



EXECUTIVE SUMMARY
CASTOR CROP SURVEY 2016-17

Executive Summary

- The Solvent Extractors' Association of India (SEA) is an all India apex body of solvent extraction industry and at present almost all-working solvent extraction units are its members. The association continuously gives feedback to the members about the developments taking place in the country and world.
- As one of its activities, SEA conducts Castor crop estimation in Gujarat, Rajasthan, Andhra Pradesh and Telangana every year. Thus SEA commissioned Nielsen India to conduct a crop estimation study for Castor Seeds in Gujarat, Rajasthan and Andhra Pradesh.
- Nielsen India is the largest market research agency in the subcontinent with the requisite experience, expertise and infrastructure to conduct such studies.
- Nielsen India is conducting such studies since 2004-05 on behalf of SEA. This year, Nielsen India will be conducting the study on behalf of SEA in Gujarat, Rajasthan Andhra Pradesh and Telangana during the period **October 2016 – May 2017**.
- Till date the study was carried out in major districts of Gujarat, Rajasthan Andhra Pradesh and Telangana in three field survey rounds during **October 2016 – February 2017** to assess the crop. Since the Castor crop cycle is long, therefore to re-assess the crop estimates two more rounds will be conducted in March & April (in Gujarat & Rajasthan) and crop estimates may be revised if necessary.

GUJARAT

- Total area under Castor crop in Gujarat for the year 2016-17 is **565,000 hectares** as per the Government's estimates. It has **decreased by 28%** as compared to the previous year, which was 781,000 hectares according to Government's estimates. The area under Castor crop has decreased across all the major Castor producing districts, except Gandhinagar, Rajkot and Kheda as compared to the previous year's government's estimates.
- Estimated total production of Castor seeds in Gujarat for the year 2016-17 is **8,61,000 tonnes**, which is **decreased by 27%** as compared to previous year.
- Average yield for the year 2016-17 is **1524 kg/hectare** as against 1502 kg/hectare during the year 2015-16. There is a slight increase in yield this year (1.5%) as compared to the previous year.

District-wise Area, Yield and Production of Castor Seeds in Gujarat (2016-17)

District	Estimated Area Under Crop ('000 ha.) #			Estimated Yield * (Kg/ha.)			Estimated Production * ('000 tonnes)		
	2015-16	2016-17	YOY % Change	2015-16	2016-17	YOY % Change	2015-16	2016-17	YOY % Change
Banaskantha	141	102	-28%	1903	1931	1%	268	197	-26%
Sabarkantha	65	17	-44%	2054	1882	-12%	134	32	-51%
Aravalli		19			1737			33	
Mehsana	84	66	-21%	1460	1561	7%	123	103	-16%
Patan	112	82	-27%	1695	1768	4%	190	145	-24%
Gandhinagar	23	24	4%	2015	1792	-11%	46	43	-7%
Kachchh	119	88	-26%	528	693	31%	63	61	-3%
Surendranagar	78	45	-42%	971	1044	8%	76	47	-38%
Jamnagar	9	8	-11%	1126	1125	--	10	9	-10%
Rajkot	8	12	50%	1433	1583	10%	12	19	58%
Vadodara	33	21	-36%	1741	1857	7%	58	39	-33%
Kheda	5	5	--	1991	1600	-20%	10	8	-20%
Ahmedabad	59	44	-25%	1988	1750	-12%	116	77	-34%
Others	45	32	-29%	1502	1500	--	67	48	-28%
Total	781	565	-28%	1502	1524	1.5%	1173	861	-27%

* Nielsen India estimates

Area as per government estimates

RAJASTHAN

- Total area under Castor crop in Rajasthan for the year 2016-17 is **170,000 hectares** as per Government area estimates. It has decreased by 14% as compared to the previous year Government estimates of area. The area has decreased in all the castor growing districts of Rajasthan, except Pali.
- Estimated total production of Castor Seeds in Rajasthan for the year 2016-17 is **123,000 tonnes**, which is **decreased by 16%** as compared to previous year.
- Average yield for the year 2016-17 is **724 kg/hectare**, which is 1.6% lower than the previous year.

District-wise Area, Yield and Production of Castor Seeds in Rajasthan (2016-17)

District	Estimated Area Under Crop ('000 ha.) #			Estimated Yield * (Kg/ha.)			Estimated Production ('000 tonnes)		
	2015-16	2016-17	YOY % Change	2015-16	2016-17	YOY % Change	2015-16	2016-17	YOY % Change
Barmer	33	28	-15%	717	786	10%	24	22	-8%
Jalore	83	62	-25%	672	694	3%	56	43	-23%
Jodhpur	32	31	-3%	436	419	-4%	14	13	-7%
Pali	0.8	2	150%	803	1000	25%	1	2	100%
Sirohi	39	38	-3%	1127	974	-14%	44	37	-16%
Others	11	9	-18%	735	667	-9%	8	6	-25%
Total	198.8	170	-14%	735	724	-1.6%	147	123	-16%

* Nielsen India estimates,

Area as per government estimates

ANDHRA PRADESH AND TELANGANA

- Total area under Castor crop in Andhra Pradesh & Telangana for the year 2016-17 is **78,000 hectares** according to the Government area estimates. It has **decreased by 31%** as compared to the previous year.
- Estimated total production of Castor Seeds in Andhra Pradesh for the year 2016-17 is **64,000 tonnes**, which is **decreased by 19%** as compared to previous year.
- Average yield for the year 2016-17 is **820 kg/hectare**, which is 18% more as compared to the yield in 2015-16

District-wise Area, Yield and Production of Castor Seeds in Andhra Pradesh and Telangana (2016-17)

District	Estimated Area Under Crop ('000 ha.) #			Estimated Yield * (Kg/ha.)			Estimated Production * ('000 tonnes)		
	2015-16	2016-17	YOY % Change	2015-16	2016-17	YOY % Change	2015-16	2016-17	YOY % Change
Andhra Pradesh									
Anantpur	10	9	-10%	850	778	-8%	8	7	-13%
Kurnool	30	23	-23%	804	652	-19%	24	15	-38%
Telangana									
Mehboob Nagar	62	42	-32%	615	929	51%	38	39	3%
Nalgonda	1	0.2	-80%	756	1000	32%	1	0.2	-80%
Rangareddy	1	1	--	636	900	42%	1	0.9	-10%
Others	10	3	-70%	693	667	-4%	7	2	-71%
Total	114	78	-31%	693	820	18%	79	64	-19%

* Nielsen India estimates

Area as per Government estimates

ALL INDIA

- Total area under Castor crop in India for the year 2016-17 is **8,45,000 hectares**, which is 26% lower than previous year.
- Estimated total production of Castor Seeds in India for the year 2016-17 is **10,67,000 tonnes**, which is **decreased by 25%** as compared to previous year.
- Average yield for the year 2016-17 is **1263 kg/hectare**, which is slightly higher than the previous year.

State-wise Area, Yield and Production of Castor Seeds in India (2016-17)

State	Area('000 ha.) #			Yield (Kg/Ha.) *			Production ('000 MT)*		
	2015-16	2016-17	YOY % Change	2015-16	2016-17	YOY % Change	2015-16	2016-17	YOY % Change
Gujarat	781	565	-28%	1502	1524	1%	1173	861	-27%
Rajasthan	199	170	-15%	735	724	-2%	147	123	-16%
Andhra Pradesh & Telangana	114	78	-32%	693	820	18%	79	64	-19%
Others	42	32	-24%	569	594	4%	24	19	-21%
Total	1136	845	-26%	1253	1263	1%	1423	1067	-25%

* Nielsen India estimates

Area as per Government estimates

Note:

- Since last year, the Crop estimation is based on the Government acreage and Nielsen yield.
- This report is on the basis of 3 rounds undertaken so far.
- Nielsen is yet to undertake the 4th round during March & 5th round during April (in Gujarat & Rajasthan)
- The final numbers of estimates would be based on 5th round.