



Profit through Knowledge

India's Oilseeds Crop Scenario for 2017/18 & Demand and Supply of Edible Oils

By

Govindbhai G. Patel

Managing Partner

G. G. Patel & Nikhil Research Company

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Why GGN



GGN Research Co. is a well recognized research company in the Oil & Oilseed Industry world over.

- ❖ **A non- biased and grass root statistics** provider relating to imports, port stocks, indigenous crop arrivals, S/d, Market developments, Factors affecting prices, Weather reports, etc.
- ❖ **An organized, updated and a well compiled data source**, which is a basic need for the industry and trading community.
- ❖ A Path with the help of which you get **most accurate and prompt** information regarding **Oil/Oilseeds Complex**.

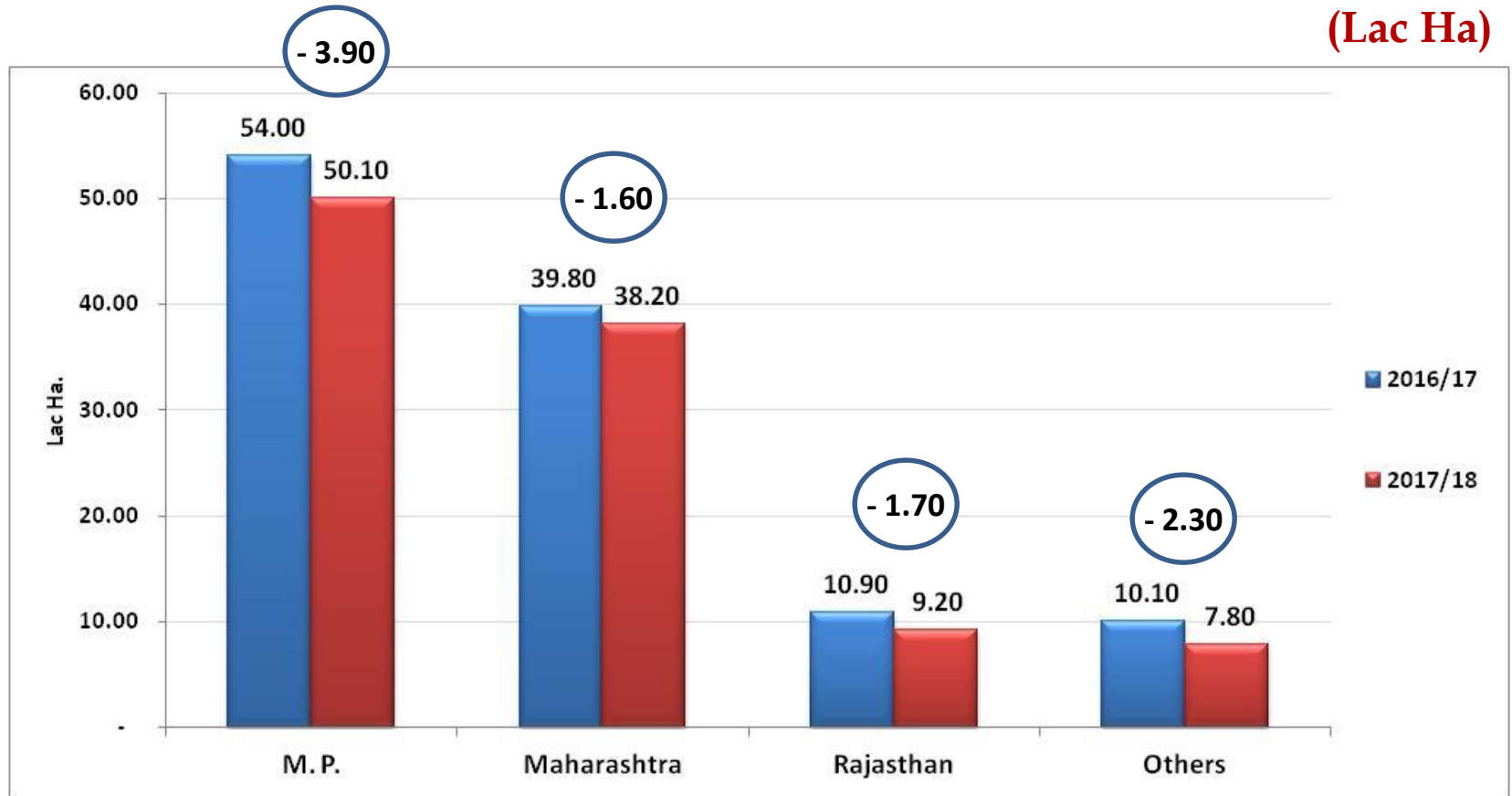


Rainfall During 2017

- 1. Monsoon started on excellent note in almost all over India. Sowing had taken place between 10th June to end of June.**
- 2. Till 6th Sept, Gujarat region received 18% excess rain, Saurashtra and Kutch region received 46% excess rain, West Rajasthan received 50% excess rain while West M.P. and East M.P. was deficient in rain by 25%. Marathwada was deficient by 11%, Vidarbha region was deficient by 28%.**
- 3. There was stress of moisture to Soybean crop in M.P. and Maharashtra during August month.**
- 4. In some parts of Gujarat and Saurashtra, there was slight damage to the crop due to excessive rain, particularly to the Cotton Crop.**
- 5. Generally, all over India, there was satisfactory rain. Till 6th Sept, according to IMD, rainfall was 95% of normal.**
- 6. In some States, there is still requirement of one rain during Sept.**



Soybean Area



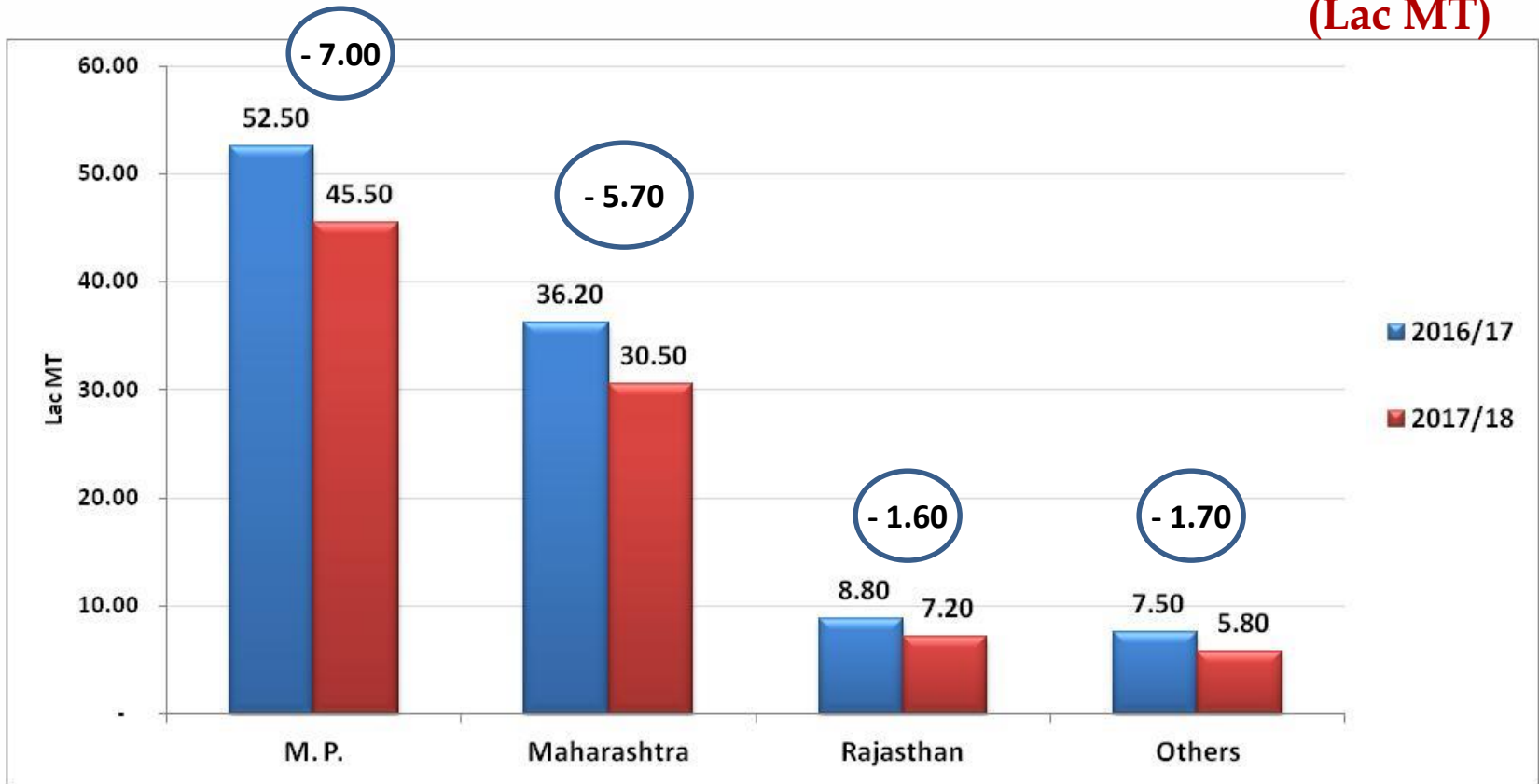
Total Area decreased by 9.50 lac Ha (-8.3%) from 114.8 to 105.30 in 2017/18.

Area for 2017/18 as on 07/09/17 as reported by Govt.



Soybean Crop

(Lac MT)

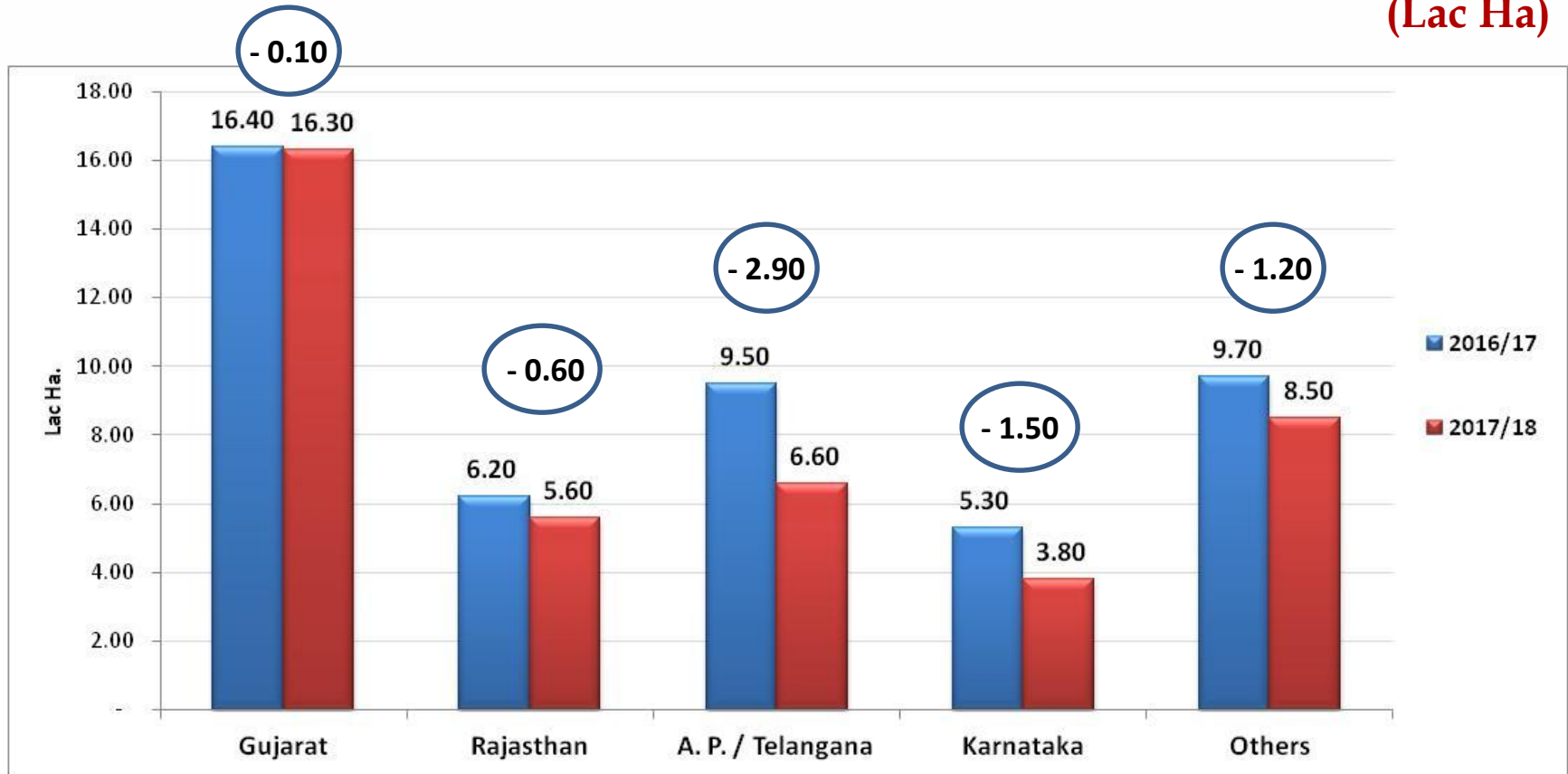


Total Crop may decrease by 16 Lac MT (-15%) to 89 Lac MT in 2017/18.



Groundnut Area

(Lac Ha)



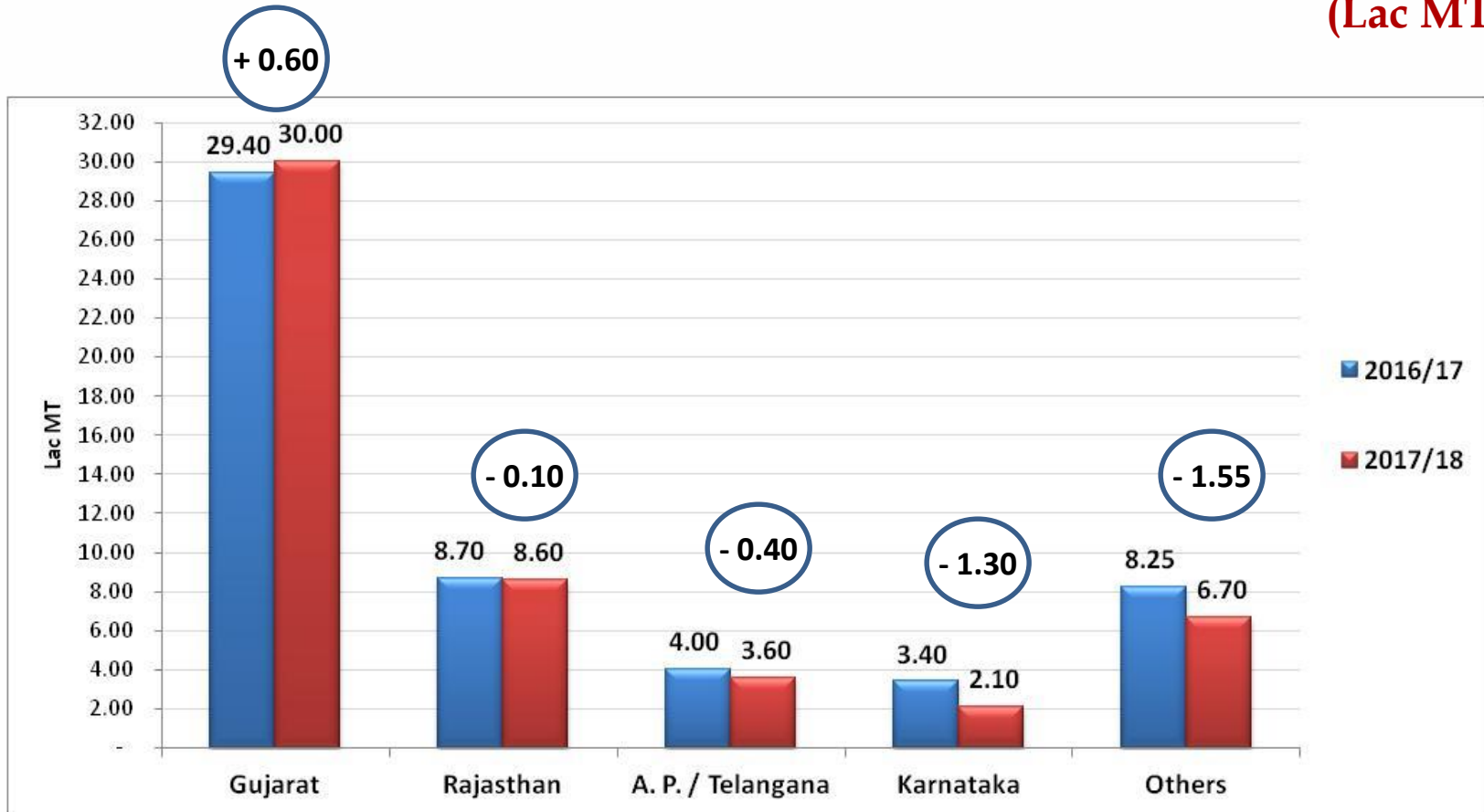
Total Area decreased by 6.30 Lac Ha (- 13.4%) from 47.10 to 40.80 in 2017/18.

Area for 2017/18 as on 07/09/17 as reported by Govt.



Groundnut Crop

(Lac MT)



Total Crop may decrease by 2.75 lac MT (- 5%) from 53.75 to 51.00 lac MT in 2017/18.



Kharif Oilseed Production During 2016/17 & 2017/18 Projection

Oilseed	Production Lac MT		
	2016/17	2017/18	+/-
Groundnut	53.75	51.00	-2.75
Soybean	105.00	89.00	-16.00
Sunflowerseed	1.45	0.80	-0.65
Sesameseed	4.15	3.50	-0.65
TOTAL	164.35	144.30	-20.05



Projection of Rabi Oilseeds Production During 2017/18 and Comparison with 2016/17

Oilseed	Production Lac MT	
	2016/1	2017/18
Groundnut	14.00	15.00
Rapeseed	67.30	63.00
Sunflower	1.50	2.50
Sesame	3.00	3.00
Safflower	0.50	0.50
Total	86.30	84.00



Projection of Availability of Domestic Edible Oils During 2017/18 & Comparison with 2016/17

(Figures in Lac MT)

Oils	2016/17	2017/18	+/- against 2016/17
1. Groundnut Oil	5.70	7.10	1.40
2. Soybean Oil	14.40	14.70	0.30
3. Rapeseed Oil	18.70	21.10	2.40
4. Sunflower Oil	1.00	1.20	0.20
5. Sesame Oil	1.20	0.90	-0.30
6. Safflower Oil	0.10	0.10	-
7. Cottonseed Oil	12.40	13.20	0.80
8. Copra Oil – Edible Use	1.70	1.80	0.10
9. Ricebran Oil (Edible)	9.60	10.00	0.40
10. S.E. Oils (GN, Rape, Sun)	2.00	2.50	0.50
11. Misc. Edible Oils	3.70	4.00	0.30
Total	70.50	76.60	6.10

Total Domestic Edible Oils production may increase by 6.10 Lac MT mainly due to large carry-in stock of oilseeds.



Projection of Import Required for 2017/18 & Comparison with 2016/17

(Figures in Lac MT)		
	2016/17	2017/18
Opening Stock	19.20	24.20
Domestic Production (+)	70.50	76.60
Total	89.70	100.80
Consumption	217.50	227.00
Deficit	127.80	126.20
Closing Stock (+)	24.20	25.00
Import Required – Edi. Oils	152.00	151.20
Per Capita Consumption (Kg.)	16.185	16.765
Per Capita Consumption Growth	3.10%	3.60%
Consumption Growth – In Quantity	9.40	9.50

Non-Edible Oil import during 2016/17 is estimated at 3.50 Lac MT & in 2017/18 it is projected at 2.50 Lac MT.



Oil-wise Import of Edible Oils During 2016/17 and Projection for 2017/18

(Figures in Lac MT)			
Oil	2016/17	2017/18	+/-
CPO	62.90	69.10	6.20
RBD OLN	29.00	21.00	-8.00
CPKO	0.90	1.20	0.30
Total Palm Oil (Edible)	92.80	91.30	-1.50
Soybean Oil	34.90	34.00	-0.90
Sun Oil	21.30	23.00	1.70
Rapeseed Oil	3.00	3.00	-
TOTAL	152.00	151.30	-0.70

2017/18 Import based on present import duty structure.



Soybean S/d. for 2016/17 (Oct-Sep)

(Figures in Lac MT)

<u>Soybean</u>	<u>Soymeal</u>
4.60 Opening Stock	18.00 Export including SAARC @
105.00 Production	4.00 Food Use
11.00 (-) Sowing	47.00 Feed Use
4.00 (-) Export & direct Use	<u>69.00</u>
83.00 (-) Crush *	
<u>11.60 Carry-out</u>	
* Note :	@ Note :
77.00 Crush during Oct to Aug	16.40 Export during Oct to July
6.00 Estimate of Crush during Sept.	1.60 Estimate of Export during Aug-Sep
<u>83.00</u>	<u>18.00</u>

Carry-out stock of Soybean is estimated at 11.60 Lac MT.



Indian S/d. of Edible Oils

(Figures in 000 MT)

Years	2008/09	2010/11	2013/14	2016/17	Increase in 9 Years
Opening Stock	788	1,438	1,409	1,924	1,136
Domestic Production	6,343	7,253	7,107	7,049	706
Import					
CPO & CPKO	5,312	5,461	6,382	6,380	1,068
RBD OLN	1,241	1,089	1,576	2,896	1,655
Total Palm Oil	6,553	6,550	7,958	9,276	2,723
Soybean Oil	990	1,008	1,951	3,491	2,501
Sunflower Oil	590	803	1,507	2,126	1,536
Rapeseed Oil	49	12	203	300	251
Total Soft Oils	1,629	1,823	3,661	5,917	4,288
Total Import	8,182	8,373	11,619	15,193	7,011
Total Supply	15,313	17,064	20,135	24,165	8,852
Consumption	14,059	15,740	18,280	21,750	7,691
Closing Stock	1,254	1,324	1,854	2,415	1,161



Major Edible Oils Consumption - Yearly

	2001/02		2008/09		2012/13		2016/17	
	Qty (000T)	% of Total	Qty (000T)	% of Total	Qty (000T)	% of Total	Qty (000T)	% of Total
GN	1,216	12.0%	591	4.2%	134	0.8%	531	2.4%
SBO	2,258	22.3%	2,112	15.0%	2,671	15.4%	4,895	22.5%
Mustard	1,721	17.0%	1,610	11.5%	2,055	11.9%	2,121	9.8%
Sun	309	3.1%	846	6.0%	1,208	7.0%	2,126	9.8%
CSO	443	4.4%	965	6.9%	1,123	6.5%	1,189	5.5%
Palm	2,944	29.1%	6,392	45.5%	8,592	49.6%	9,105	41.9%
Others	1,234	12.2%	1,543	11.0%	1,537	8.9%	1,783	8.2%
Total Consum.	10,125	100%	14,059	100%	17,320	100%	21,750	100%
Per Capita Consum. (In Kg)	9.391		11.581		13.531		16.187	

Others : Sesame, Safflower, Copra, RBO, SE Oils, Domestic Palm Oil & Misc. Edible Oils



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contact@ggnresearch.com