

S.No.1

Presentation on  
India's Khariff Oilseeds Crop Prospects for

2009-10

By

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At

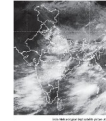
SEA Annual General Meeting

On 25th Sept. 2009

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S.No.2



## RAINFALL

This year, the monsoon in India was very much erratic and not satisfactory. The temporal distribution was also bad. The onset of monsoon was late by around 2/3 weeks. This resulted into late sowing and arrival of crops may also be late than usual time.

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### RAINFALL DETAILS

#### :: Gujarat ::

Rain 28.7% above the LPA (Long Period Average) – Temporal distribution so bad that yields are bad – GN crop extremely sensitive to distribution of rain – GN crop acreage down by 10% - Gujarat is the largest producer of Cotton in India – Area under Cotton has increased by about 6% - Cotton crop is less sensitive to temporal distribution of rain.

#### :: Madhya Pradesh ::

By August end 31% below LPA in West M.P. & 38% below LPA in East M.P. – 37 districts out of 50 districts declared drought affected – Soybean crop is relatively less sensitive to the temporal distribution of rains – No major change in Soybean area – Cotton crop prospects almost as good as 2008.

#### :: Andhra Pradesh ::

Second largest producer of GN – Highly dependent on rain – Rains below 30% of LPA – GN crop area down by 35% because of poor rains – Compounded effect will be very damaging – Cotton crop is also affected badly.

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### RAINFALL DETAILS (2)

#### :: Karnataka ::

Received good rains – 13% & 17% higher than LPA in North & South Karnataka respectively till August end. – Normal in June & July but deficient in August – In spite of good rain, area under GN decreased by 10% & slightly increased for Soybean from 2 Lac Ha. (in 2008) to 2.40 Lac Ha. – Cotton crop prospects are bright.

#### :: Maharashtra ::

By end August, rainfall was 22% below LPA – Vidharbha, Marathawada, Konkan & Goa recorded deficient rains while central Maharashtra received normal rains – of the 33 districts, 21 received deficient rains – of the 353 sub-districts, 221 have been declared drought affected – Maharashtra is second largest producer of Cotton in India – Area under Cotton increased by 7% – Cotton crop prospects bright.

**Recent rains During end of August & beginning of September in almost all the Oilseeds growing States, have improved the crop prospects and it is not as gloomy as it was till middle of August.**

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**CUMULATIVE RAINFALL**

	Cumulative Rainfall variation % from Normal				
	North West	Central	South Penna sula	North East	All India
24 <sup>th</sup> June'09	-49	-73	-38	-55	-68
29 <sup>th</sup> July'09	-33	1	-15	-39	-18
26 <sup>th</sup> August'09	-40	-20	-14	-25	-25
16 <sup>th</sup> Sept'09	-32	-17	-8	-26	-21

As stated in this Table, All India LPA was deficient by 68% till 24th June, 18% by 29th July, 25% by 16th August and improved to deficiency of 21% by 16th September (IMD data).  
Two drought years in India within last 10 years – In 2002 & 2004 – The LPA deficiency was 22% in 2002 & 24% in 2004. During these two drought years Khariff Oilseeds production had decreased by 28% in 2002-03 & by 13% in 2004-05 against previous years. Although deficiency in 2009 is as bad as, 2002, but Khariff production is likely to be less by 5% only against 2008-09 – The last rain from end August to beginning of September has saved us from disastrous situation. But GN crop is very badly affected.  
IMD may declare monsoon withdraw this week for current year.

S.No.6

**TABLE - "A"**  
KHARIFF EDIBLE OILSEEDS AREA DURING  
2008-09 AND 2009-10

Oilseeds	2008-09 Area Lac Ha.	2009-10 Area Lac Ha.	+/- against 2008-09
Groundnut	52.89	44.00	-8.89
Soybean	96.42	95.70	-0.72
Sunflower	6.73	6.00	-0.73
Sesameseed	15.66	14.80	-0.86
Nigerseed	4.02	3.00	-1.02
<b>TOTAL</b>	<b>175.72</b>	<b>163.50</b>	<b>-12.22</b>

Khariff Oilseeds area decreased by around 12 Lac Ha.

NOTE :

Area for 2009-10 as reported by the Government on 17-09-09

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**TABLE - "B"**  
ESTIMATE OF KHARIFF EDIBLE OILSEEDS  
CROPS DURING 2009-10 & COMPARISON  
WITH 2008-09

Oilseeds	2008-09 Lac MT	2009-10 Lac MT	+/- Against 2008-09
Groundnut	42.20	32.00	-10.20
Soybean	85.00	90.00	5.00
Sunflower	4.00	3.50	-0.50
Sesameseed	3.50	3.30	-0.20
Nigerseed	0.80	0.60	-0.20
Rape/Toria	1.50	1.50	0.00
<b>TOTAL</b>	<b>137.00</b>	<b>130.90</b>	<b>-6.10</b>

The Khariff Oilseeds crops may decrease by 6 Lac MT during 2009-10 against 2008-09.

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**TABLE - "C"**  
GROUNDNUT KHARIFF AREA DURING  
2008-09 AND 2009-10

State	2008-09 Area Lac Ha.	2009-10 Area Lac Ha.	+/- against 2008-09
Gujarat	17.91	16.00	-1.91
Maharashtra	2.47	2.50	0.03
Andhra Pra.	14.55	9.70	-4.85
Tamil Nadu	3.62	2.60	-1.02
Karnataka	6.40	5.70	-0.70
M. P. / CG.	2.54	2.45	-0.09
Rajasthan	3.29	3.15	-0.14
Pun/Har/UP	1.15	0.95	-0.20
Orissa	0.90	0.85	-0.05
Others	0.06	0.10	0.04
<b>TOTAL</b>	<b>52.89</b>	<b>44.00</b>	<b>-8.89</b>

Among all the Oilseeds area for Khariff in 2009-10, the largest shortfall is in Groundnut area where it decreased by 9 Lac Ha. The largest shortfall is in A.P. where it decreased by 4.85 Lac Ha. followed by Gujarat and Tamil Nadu where it decreased by 1.90 and 1 Lac Ha.

NOTE :

Area for 2009-10 as reported by the Government on 17-09-09

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**TABLE - "D"**  
ESTIMATE OF KHARIFF GROUNDNUT  
CROP  
DURING 2009-10 & COMPARISON WITH  
2008-09

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State	2008-09 Lac MT	2009-10 Lac MT	+/- against 2008-09
Gujarat	19.00	12.50	-6.50
Maharashtra	2.00	1.70	-0.30
Andhra Pra.	7.50	4.80	-2.70
Tamil Nadu	2.00	1.70	-0.30
Karnataka	3.50	4.00	0.50
M. P. / CG.	1.50	1.50	0.00
Rajasthan	4.50	4.00	-0.50
Pun/Har/UP	1.00	0.70	-0.30
Orissa	0.70	0.60	-0.10
Others	0.50	0.50	0.00
<b>TOTAL</b>	<b>42.20</b>	<b>32.00</b>	<b>-10.2</b>

All India Groundnut crop is estimated to decreased by 10 Lac MT in 2009-10 against 2008-09. The largest shortfall is in Gujarat and in A.P.



S.No.10

**TABLE - "E"**  
SOYBEAN KHARIFF AREA  
DURING  
2008-09 AND 2009-10

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State	2008-09 Area Lac Ha.	2009-10 Area Lac Ha.	+/- against 2008-09
M.P.	51.42	51.00	-0.42
Maharashtra	30.68	30.70	0.02
Rajasthan	8.52	7.20	-1.32
Others	5.80	6.80	1.00
<b>TOTAL</b>	<b>96.42</b>	<b>95.70</b>	<b>-0.72</b>

All India Soybean area during 2009-10 decreased by around 70,000 Ha. but Rajasthan area decreased by 1,30,000 Ha. and in other States it increased by 1 Lac Ha.

NOTE :  
Area for 2009-10 as reported by the Government on 17-09-09

S.No.11

**TABLE - "F"**  
ESTIMATE OF KHARIFF SOYBEAN CROP  
DURING 2009-10 & COMPARISON WITH  
2008-09

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State	2008-09 Lac MT	2009-10 Lac MT	+/- against 2008-09
M.P.	53.00	56.00	3.00
Maharashtra	22.00	23.00	1.00
Rajasthan	5.00	5.50	0.50
Others	5.00	5.50	0.50
<b>TOTAL</b>	<b>85.00</b>	<b>90.00</b>	<b>5.00</b>

All India Soybean crop is estimated to increase by 5 Lac MT in 2009-10 against 2008-09. The largest increase is estimated in M.P. by 3 Lac MT.



S.No.12

**TABLE - "G"**  
POTENTIAL OF AVAILABILITY OF  
EDIBLE OILS OUT OF KHARIFF CROPS  
DURING 2009-10 & COMPARISON  
WITH 2008-09

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Oils	2008-09 Lac MT	2009-10 Lac MT	+/- against 2008-09
Groundnut	4.20	1.76	-2.44
Soybean	11.90	13.60	1.70
Sunflower	1.37	1.19	-0.18
Sesameseed	0.36	0.27	-0.09
Nigerseed	0.12	0.06	-0.06
Rape/Toria	0.50	0.50	0.00
Cottonseed	9.36	10.46	1.10
Ricebran (Ref.)	7.40	6.65	-0.75
S.E. Oils	1.90	1.55	-0.35
Misc. Edi. Oils	0.85	0.85	-
<b>TOTAL</b>	<b>37.96</b>	<b>36.89</b>	<b>-1.07</b>

The largest shortfall may be in Groundnut Oil which may reduce by around 2.40 Lac MT and the net availability may remain only 1.75 Lac MT. The availability of Soybean Oil may increase by 1.70 Lac MT. Overall deficit is estimated at 1 Lac MT.

Production of Cottonseed Oil is bases on 290 Lac Bales Cotton crop in 2008-09 & 320 Lac Bales in 2009-10

S.No.13

TABLE - "H"

CALCULATION OF AVAILABILITY OF  
GROUNDNUT OIL

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GROUNDNUT

Particulars	2008-09	2009-10
	Lac MT	Lac MT
Crop in-shell	42.20	32.00
Kernel @ 70%	29.50	22.40
Use - Kernel	19.00	18.00
M. S. - Kernel	10.50	4.40
Oil @ 40%	4.20	1.76

GN KERNEL USE DETAILS  
(Approx.)

Particulars	Lac MT
For sowing	7.00
Export	1.50
For Direct Consumption	9.50
<b>TOTAL</b>	<b>18.00</b>

S.No.14

TABLE - "I"

ESTIMATE OF COTTON CROP AREA & PRODUCTION  
DURING 2009-10 & COMPARISON WITH 2008-09

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State	2008-09		2009-10	
	Area	Prod.	Area	Prod.
	Lac Ha.	Lac bales	Lac Ha.	Lac bales
Punjab	5.37	17.50	5.56	20.00
Haryana	4.55	14.00	5.45	17.00
Rajasthan	2.23	7.50	3.19	8.00
North TTL	12.15	39.00	14.20	45.00
Gujarat	24.00	88.00	25.50	105.00
Maharashtra	31.50	67.00	33.83	73.00
Madhya Pradesh	6.50	17.00	7.00	18.00
Central TTL	62.00	172.00	66.33	196.00
Andhra Pradesh	13.50	52.00	12.00	47.00
Karnataka	4.00	8.00	4.00	12.00
Tamil Nadu	1.25	5.00	1.00	5.00
South TTL	18.75	65.00	17.00	64.00
Others	1.00	2.00	2.00	3.00
TOTAL	93.90	278.00	99.53	308.00
Loose	-	10.00	-	10.00
<b>GRAND TOTAL</b>	<b>93.90</b>	<b>288.00</b>	<b>99.53</b>	<b>318.00</b>

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PROSPECTS FOR RABI CROPS

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Recent rains during end August to beginning of September has improved the prospects for Rabi crops. We have 2 major crops in Rabi

**:: RAPESEED ::**

Area under Rapeseed may increase by 5/7 Lac Ha. against current year's area of 66 Lac Ha. due to following reasons :-

- (a) In the Rapeseed growing States there was more deficiency of rains in June & July. Hence vacant land is available.
- (b) Rapeseed requires less water in comparison with Wheat & Gram.
- (c) During 2004-05 & 2005-06 area under Rapeseed had increased to 73 Lac Ha. Hence it is quite possible that this year area may increase by 5/6 Lac Ha.
- (d) Rapeseed crop may increase by 5/7 Lac MT if weather is favourable during sowing time and thereafter.



**:: GROUNDNUT ::**

Groundnut crop may increase to its normal level to 17/18 Lac MT against current year's 15 Lac MT

But the only worry is, as reported by the Government on 18<sup>th</sup> September '09, water level in Nation's 81 main reservoirs are up to 57%. Farmers use this water for Rabi crops. 57% water level is not considered satisfactory.

