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Report Name: Oilseeds and Products Update

Country: India

Post: New Delhi

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Report Highlights:

FAS New Delhi reduced its initial forecast for India's 2025/26 rapeseed harvested area and production, primarily due to farmers shifting from rapeseed to wheat cultivation in pursuit of higher returns. Post also revised down rapeseed meal production from initial projections, mainly due to ongoing geopolitical tensions between India and Bangladesh that have disrupted trade. Despite this, strong demand from the domestic market and China is expected to keep production above 2024/25 levels. Post revised down the rapeseed oil production estimate by two percent to 4.2 MMT, reflecting updated acreage and output figures, though production remains above last year's level due to favorable weather, improved seed varieties, and higher oil content. Consumption estimates have also been lowered to 4 MMT based on revised crushing figures; however, consumption still exceeds 2024/25 levels, supported by steady demand for rapeseed oil's health benefits and its continued popularity, especially in rural households.

OILSEEDS

Table 1: Oilseed, Rapeseed, Production, Supply and Distribution

Oilseed, Rapeseed Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	9250	9250	9300	8950	9400	9300
Area Harvested (1000 HA)	9250	9250	8900	8900	9250	9100
Beginning Stocks (1000 MT)	619	619	569	569	539	569
Production (1000 MT)	11600	11600	11520	11700	12000	11900
MY Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	12219	12219	12089	12269	12539	12469
MY Exports (1000 MT)	0	0	0	0	0	0
Crush (1000 MT)	10450	10450	10350	10500	10750	10700
Food Use Dom. Cons. (1000 MT)	650	650	650	650	650	650
Feed Waste Dom. Cons. (1000 MT)	550	550	550	550	575	550
Total Dom. Cons. (1000 MT)	11650	11650	11550	11700	11975	11900
Ending Stocks (1000 MT)	569	569	539	569	564	569
Total Distribution (1000 MT)	12219	12219	12089	12269	12539	12469
Yield (MT/HA)	1.25	1.25	1.29	1.31	1.29	1.31

(1000 HA) ,(1000 MT) ,(MT/HA)
OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Data source for oilseed table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Area Harvested and Production: FAS New Delhi revised down India's 2025/26 rapeseed harvested area to 9.1 million hectares (MHa)—down 1.6 percent from the initial 9.25 MHa estimate (see: [Oilseeds and Products Annual](#)). The main driver for this reduction is a shift by farmers to wheat after the strong southwest monsoon of 2025 which boosted soil moisture and water resources in favor of the crop. The improved moisture conditions led farmers in Rajasthan (the largest rapeseed producer) and neighboring regions of Uttar Pradesh and Haryana to favor wheat, which offers a higher average yield of approximately 3.5 MT/Ha compared to rapeseed's 1.2 to 1.4 MT/Ha. In Kota and Alwar districts of Rajasthan, water availability prompted some farmers to plant rice first, then switch to wheat after late harvests. Additionally, in some areas, rain spells in early October—during the rapeseed sowing period—necessitated resowing which also impacted the rapeseed area harvested.

Despite the reduction, 2025/26 acreage exceeds last year's by over two percent, driven by strong MY 2024/25 market prices. The crop shows good health with no major pest issues, supporting relative growth in acreage compared to the previous marketing year. See Figure 1.

Figure 1: Rapeseed field from January 13 through 16, 2026



Source: FAS crop survey – Bharatpur, Rajasthan

FAS New Delhi also cut its 2025/26 rapeseed production estimate from the initial forecast by two percent to reflect reduced harvested area. See Table 1. Yield is expected to reach 1.31 MT/Ha, boosted by favorable weather, efficient fertilizer use, and high-yielding varieties like Pioneer (1.2-1.4 MT/Ha). Late January rainfall will further sustain yields. Post reports robust pod development with oil content of 39 to 42 percent, occasionally hitting 43 percent. See Figure 2.

Figure 2: Rapeseed Pod Formation from January 13 through 16, 2026



Source: FAS crop survey - Alwar, Rajasthan

Figure 3 depicts a rapeseed field in Gandoli village, located in Bundi district, Rajasthan. The image highlights the advanced stage of pod development, with the crop nearing maturity. According to local observations, the rapeseed plants are approximately three weeks from harvest, showing healthy growth and favorable conditions leading up to the final stages of the production cycle. This stage is critical, as proper pod development directly influences both yield and oil content, and the field's condition suggests a promising outlook for the upcoming harvest.

Figure 3: Rapeseed field from January 13 through 16, 2026

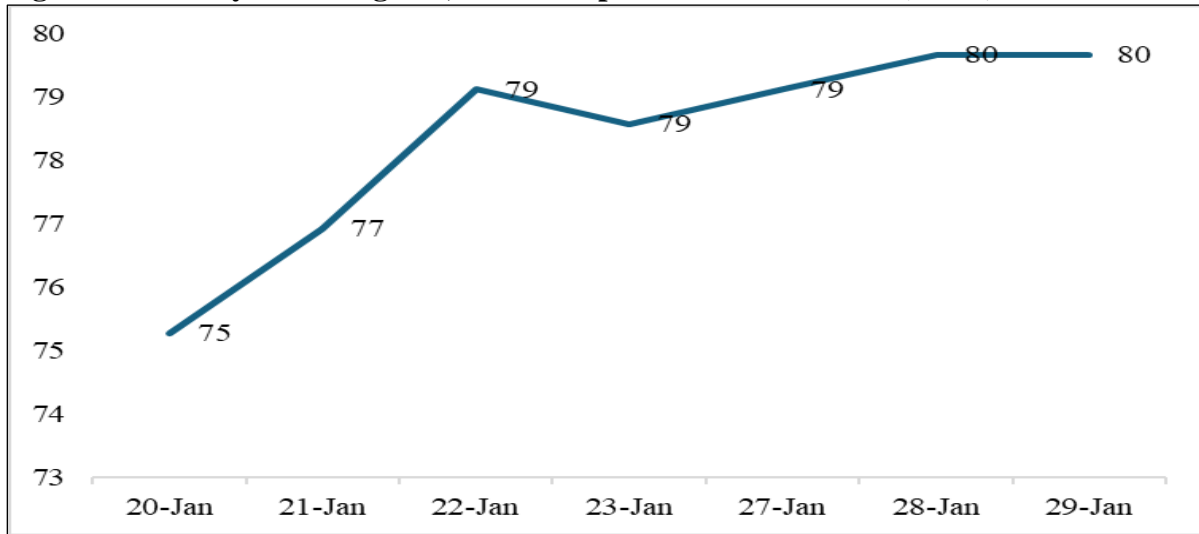


Source: FAS crop survey - Bundi, Rajasthan

Consumption: Post reduced the rapeseed crushing estimate to 10.7 MMT, down from the initial forecast of 10.9 MMT, reflecting the decreases in acreage and production. Despite this adjustment, the current estimate is still two percent higher than last year's figure of 10.5 MMT. This growth across marketing years is driven by sustained demand from crushers and millers, who continue to meet the traditional preference for rapeseed oil among Indian consumers. Rapeseed oil consumption is maintaining its popularity in both urban and rural households. Furthermore, rapeseed meal demand from China has also increased in the past few months after a 100 percent retaliatory tariff on rapeseed meal and oil imports from Canada. Concurrently, following a correction to food use and feed waste data, total domestic consumption has been revised downward to 11.9 MMT, representing a 2.2 percent decrease over the initial forecast of 12.1 MMT.

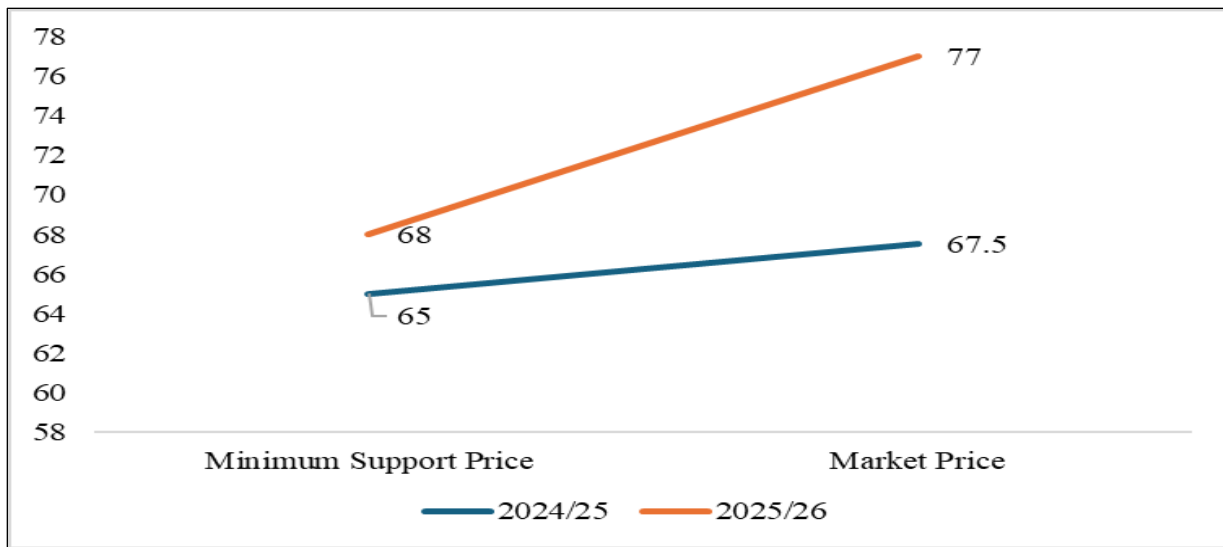
Prices: In October 2025, [the Indian government raised the Minimum Support Price \(MSP\)](#) for rapeseed by four percent, setting it at \$68 per quintal (INR 6,200 per quintal). Post's observations of last year's stock arrivals at mandis indicate that current market prices are exceeding the MSP, ranging from \$75 to \$80 per quintal (INR 6,800 to 7,250 per quintal) in major trading centers during the first three weeks of January 2026. See Figure 4. These prices are notably higher than those recorded during the same period in 2025 ranging from \$66 to \$70 per quintal (INR 6,050 to 6,300 per quintal). See Figure 5.

Figure 4. January 20 through 29, 2026 – Rapeseed Market Prices (\$/MT)



Source: FAS market survey

Figure 5. January 2024/25 and 2025/26 – Rapeseed Prices (\$/MT)



Source: FAS market survey

Industry sources indicate expectations that Rajasthan will introduce a price support program, [Bhavantar Yojana](#), similar to the program for soybeans in the state of Madhya Pradesh. The expectation is that the program would be implemented to support any decline in rapeseed prices. This type of program generally compensates farmers when market rates fall below the MSP, helping to stabilize incomes amid market fluctuations. It was recently reintroduced and implemented by the state government of Madhya Pradesh for Kharif 2025 (summer planting season) to address significant price drops for soybeans.

Stocks: Post projects ending stocks to remain unchanged at 569 thousand metric tons (TMT), based on steady demand from crushers. Field reports show that local markets have limited

supplies, a result of last year's consistently tight stock levels. These conditions are likely to keep oilseed prices high. See Figure 5.

Figure 5: Rapeseed Market-yard arrival from January 13 through 16, 2026



Source: FAS crop survey – Kota Market-yard, Rajasthan

As there are no significant market developments in the remaining oilseeds, Post maintains the initial forecast from the 2025 annual report or estimates from subsequent updates.

Table 2: Oilseed, Copra, Production, Supply and Distribution

Oilseed, Copra Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	2200	2200	2200	2200	2200	2202
Area Harvested (1000 HA)	2160	2160	2160	2160	2160	2161
Trees (1000 TREES)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	10	10	10	12	10	12
Production (1000 MT)	935	935	935	935	935	940
MY Imports (1000 MT)	9	9	10	6	10	6
Total Supply (1000 MT)	954	954	955	953	955	958
MY Exports (1000 MT)	17	17	20	16	20	16
Crush (1000 MT)	900	900	900	900	900	904
Food Use Dom. Cons. (1000 MT)	15	15	15	15	15	15
Feed Waste Dom. Cons. (1000 MT)	12	10	10	10	10	10
Total Dom. Cons. (1000 MT)	927	925	925	925	925	929
Ending Stocks (1000 MT)	10	12	10	12	10	13
Total Distribution (1000 MT)	954	954	955	953	955	958
Yield (MT/HA)	0.43	0.43	0.43	0.43	0.43	0.43
(1000 HA) ,(1000 TREES) ,(1000 MT) ,(MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oilseed table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Table 3: Oilseed, Cottonseed, Production, Supply and Distribution

Oilseed, Cottonseed Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (Cotton) (1000 HA)	12900	12900	12700	12700	0	12600
Area Harvested (Cotton) (1000 HA)	12680	12700	11484	12100	11200	11900
Seed to Lint Ratio (RATIO)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	376	376	424	424	298	424
Production (1000 MT)	10783	10783	9849	10450	9977	10250
MY Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	11159	11159	10273	10874	10275	10674
MY Exports (1000 MT)	0	0	0	0	0	0
Crush (1000 MT)	9400	9400	8800	9000	8850	8800
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	1335	1335	1175	1450	1100	1465
Total Dom. Cons. (1000 MT)	10735	10735	9975	10450	9950	10265
Ending Stocks (1000 MT)	424	424	298	424	325	409
Total Distribution (1000 MT)	11159	11159	10273	10874	10275	10674
Yield (MT/HA)	0.8504	0.8491	0.8576	0.8636	0.8908	0.8613
(1000 HA) ,(RATIO) ,(1000 MT) ,(MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oilseed table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Table 4: Oilseed, Peanut, Production, Supply and Distribution

Oilseed, Peanut Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	5500	5300	5600	5600	5600	5620
Area Harvested (1000 HA)	5000	4950	5500	5500	5600	5600
Beginning Stocks (1000 MT)	328	328	305	434	357	476
Production (1000 MT)	6000	6100	7100	7200	7500	7500
MY Imports (1000 MT)	2	2	2	2	2	2
Total Supply (1000 MT)	6330	6430	7407	7636	7859	7978
MY Exports (1000 MT)	1000	800	1200	750	1200	928
Crush (1000 MT)	3400	3400	3800	4100	4000	4200
Food Use Dom. Cons. (1000 MT)	1400	1446	1500	1735	1600	1750
Feed Waste Dom. Cons. (1000 MT)	225	350	550	575	700	600
Total Dom. Cons. (1000 MT)	5025	5196	5850	6410	6300	6550
Ending Stocks (1000 MT)	305	434	357	476	359	500
Total Distribution (1000 MT)	6330	6430	7407	7636	7859	7978
Yield (MT/HA)	1.2	1.23	1.29	1.30	1.33	1.33
(1000 HA) ,(1000 MT) ,(MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oilseed table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Table 5: Oilseed, Soybean, Production, Supply and Distribution

Oilseed, Soybean Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	13300	13300	13600	13600	13700	12500
Area Harvested (1000 HA)	13200	13150	13000	13500	12000	11500
Beginning Stocks (1000 MT)	1584	1584	935	950	659	1065
Production (1000 MT)	11875	12240	12582	12582	10500	10700
MY Imports (1000 MT)	634	634	4	150	400	50
Total Supply (1000 MT)	14093	14458	13521	13682	11559	11815
MY Exports (1000 MT)	8	8	12	25	20	25
Crush (1000 MT)	11300	11600	11000	10542	9275	9500
Food Use Dom. Cons. (1000 MT)	700	700	750	750	700	820
Feed Waste Dom. Cons. (1000 MT)	1150	1200	1100	1300	900	720
Total Dom. Cons. (1000 MT)	13150	13500	12850	12592	10875	11040
Ending Stocks (1000 MT)	935	950	659	1065	664	750
Total Distribution (1000 MT)	14093	14458	13521	13682	11559	11815
Yield (MT/HA)	0.89	0.93	0.96	0.93	0.87	0.93

(1000 HA) ,(1000 MT) ,(MT/HA)
OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Data source for oilseed table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Table 6: Oilseed, Sunflowerseed, Production, Supply and Distribution

Oilseed, Sunflowerseed Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	290	290	290	290	300	290
Area Harvested (1000 HA)	150	150	180	180	180	180
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	112	112	113	113	113	113
MY Imports (1000 MT)	6	6	12	6	6	6
Total Supply (1000 MT)	118	118	125	119	119	119
MY Exports (1000 MT)	2	2	1	1	1	1
Crush (1000 MT)	95	95	100	95	100	95
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	21	21	24	23	18	23
Total Dom. Cons. (1000 MT)	116	116	124	118	118	118
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	118	118	125	119	119	119
Yield (MT/HA)	0.7467	0.7467	0.6278	0.6278	0.6278	0.6278
(1000 HA) ,(1000 MT) ,(MT/HA)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oilseed table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

OILSEED MEALS

Table 7: Oil meal, Rapeseed, Production, Supply and Distribution

Meal, Rapeseed Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	10450	10450	10350	10500	10750	10700
Extr. Rate, 999.9999 (PERCENT)	0.59	0.59	0.59	0.59	0.59	0.59
Beginning Stocks (1000 MT)	197	197	224	224	204	326
Production (1000 MT)	6219	6219	6189	6200	6399	6400
MY Imports (1000 MT)	17	17	21	2	2	2
Total Supply (1000 MT)	6433	6433	6434	6426	6605	6728
MY Exports (1000 MT)	1609	1609	1870	1500	1700	1490
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	4600	4600	4360	4600	4700	4750
Total Dom. Cons. (1000 MT)	4600	4600	4360	4600	4700	4750
Ending Stocks (1000 MT)	224	224	204	326	205	488
Total Distribution (1000 MT)	6433	6433	6434	6426	6605	6728
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oilmeal table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Production: Post has revised the rapeseed meal production estimate downward by one percent. In the past, India’s rapeseed crushing was motivated by strong demand for both oil and meal. However, since the last two years due to geopolitical tensions between India and Bangladesh, the primary impetus for crushing is the heightened demand for oil. Despite the slight reduction from the earlier MY2025/26 forecast, the current production figure remains three percent above the 2024/25 level, reflecting increased crushing activity due to domestic demand of oil and a rising demand of Indian rapeseed meal in China.

Post maintains consumption at 4.8 MMT and export at 1.5 MT. Although ongoing tensions between India and Bangladesh have disrupted rapeseed meal trade, strong demand from China has helped stabilize the market in recent months. In MY 2024/25, China imported over 500 TMT of Indian rapeseed meal, making it the largest buyer.

Stock: Post has revised the ending stock estimate to 488 TMT, down from the initial projection of 569 TMT, in response to domestic feed consumption and a considerable demand from China. Even with this downward adjustment, current stock levels remain 50 percent higher than last year, largely because exports to Bangladesh have declined. As a result, more rapeseed meals have remained within the domestic market, contributing to the higher stock levels compared to the previous year.

As there are no significant market developments in the remaining meals, Post maintains the initial forecast from the 2025 annual report or estimates from subsequent updates.

Table 8: Oil meal, Copra, Production, Supply and Distribution

Meal, Copra Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	900	900	900	900	900	904
Extr. Rate, 999.9999 (PERCENT)	0.34	0.34	0.34	0.34	0.34	0.34
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	310	310	310	310	310	312
MY Imports (1000 MT)	136	136	178	150	150	150
Total Supply (1000 MT)	446	446	488	460	460	462
MY Exports (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	10	10	10	10	10	10
Feed Waste Dom. Cons. (1000 MT)	436	436	478	450	450	452
Total Dom. Cons. (1000 MT)	446	446	488	460	460	462
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	446	446	488	460	460	462
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oilmeal table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Table 9: Oil meal, Cottonseed, Production, Supply and Distribution

Meal, Cottonseed Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
India						
Crush (1000 MT)	9400	9400	8800	9000	8850	8800
Extr. Rate, 999.9999 (PERCENT)	0.46	0.46	0.46	0.46	0.46	0.46
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	4395	4395	4114	4150	4137	4050
MY Imports (1000 MT)	30	30	87	22	20	19
Total Supply (1000 MT)	4425	4425	4201	4172	4157	4069
MY Exports (1000 MT)	16	16	13	25	20	25
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	4409	4409	4188	4147	4137	4044
Total Dom. Cons. (1000 MT)	4409	4409	4188	4147	4137	4044
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	4425	4425	4201	4172	4157	4069
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oilmeal table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Table 10: Oil meal, Peanut, Production, Supply and Distribution

Meal, Peanut Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	3400	3400	3800	4100	4000	4200
Extr. Rate, 999.9999 (PERCENT)	0.41	0.41	0.41	0.41	0.41	0.41
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	1427	1400	1594	1690	1679	1750
MY Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1427	1400	1594	1690	1679	1750
MY Exports (1000 MT)	21	25	34	65	50	65
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	5	5	5	5	5	5
Feed Waste Dom. Cons. (1000 MT)	1401	1370	1555	1620	1624	1680
Total Dom. Cons. (1000 MT)	1406	1375	1560	1625	1629	1685
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	1427	1400	1594	1690	1679	1750
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oilmeal table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Table 11: Oilmeal, Soybean, Production, Supply and Distribution

Meal, Soybean Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	11300	11600	11000	10542	9275	9500
Extr. Rate, 999.9999 (PERCENT)	0.8	0.8	0.8	0.8	0.8	0.8
Beginning Stocks (1000 MT)	195	195	223	386	252	665
Production (1000 MT)	9040	9280	8800	8434	7420	7600
MY Imports (1000 MT)	29	29	10	20	250	50
Total Supply (1000 MT)	9264	9504	9033	8840	7922	8315
MY Exports (1000 MT)	1966	1968	1781	1300	750	1235
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	450	450	475	475	375	475
Feed Waste Dom. Cons. (1000 MT)	6625	6700	6525	6400	6600	6150
Total Dom. Cons. (1000 MT)	7075	7150	7000	6875	6975	6625
Ending Stocks (1000 MT)	223	386	252	665	197	455
Total Distribution (1000 MT)	9264	9504	9033	8840	7922	8315
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oilmeal table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Table 12: Oilmeal, Sunflowerseed, Production, Supply and Distribution

Meal, Sunflowerseed Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	95	95	100	95	100	95
Extr. Rate, 999.9999 (PERCENT)	0.48	0.48	0.48	0.48	0.49	0.48
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	46	46	48	46	49	46
MY Imports (1000 MT)	128	128	6	129	100	129
Total Supply (1000 MT)	174	174	54	175	149	175
MY Exports (1000 MT)	0	0	0	0	0	0
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	0	0	0	0	0	0
Feed Waste Dom. Cons. (1000 MT)	174	174	54	175	149	175
Total Dom. Cons. (1000 MT)	174	174	54	175	149	175
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	174	174	54	175	149	175
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oilmeal table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

OILSEED OILS

Table 13: Oil, Rapeseed, Production, Supply and Distribution

Oil, Rapeseed Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	10450	10450	10350	10500	10750	10700
Extr. Rate, 999.9999 (PERCENT)	0.38	0.38	0.38	0.38	0.38	0.38
Beginning Stocks (1000 MT)	402	402	393	393	357	358
Production (1000 MT)	3975	3975	3956	4050	4090	4150
MY Imports (1000 MT)	6	6	26	5	40	5
Total Supply (1000 MT)	4383	4383	4375	4448	4487	4513
MY Exports (1000 MT)	10	10	13	10	10	10
Industrial Dom. Cons. (1000 MT)	80	80	80	80	80	80
Food Use Dom. Cons. (1000 MT)	3900	3900	3925	4000	4000	4063
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	3980	3980	4005	4080	4080	4143
Ending Stocks (1000 MT)	393	393	357	358	397	360
Total Distribution (1000 MT)	4383	4383	4375	4448	4487	4513
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oil table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Production: Post has revised the rapeseed oil production estimate for MY 2025/26 to 4.2 MMT, representing a two percent decrease from the earlier projection. This adjustment reflects Post’s updated figures for both acreage and rapeseed oilseed output. However, production remains 2.5 percent higher than last year. Observations from the recent crop tour and feedback from field sources indicate that favorable temperatures and the use of improved seed varieties have supported the podding stage, likely resulting in increased oil content and extraction rates exceeding 38 percent. Additionally, rainfall in the last week of January 2026 is expected to further enhance oil content. See Table 13.

Consumption: Post has lowered its food use rapeseed oil consumption estimate from the initial forecast of 4.1 MMT to 4 MMT, reflecting adjustments made to crushing figures. Despite this downward revision, consumption is still two percent above the 2024/25 level, underscoring the steady demand for rapeseed oil driven by its recognized health benefits and enduring popularity in both urban and rural households. While urban consumers are increasingly turning to alternatives such as sunflower and refined oils for their lighter taste and cooking qualities,

rapeseed oil remains the preferred choice in rural areas due to its robust flavor and suitability for traditional dishes. Nearly all rapeseed oil produced in India is used domestically, with minimal trade activity.

Stocks: Post maintains ending stocks steady at 360 TMT, supported by strong rapeseed production and sustained demand for edible oil.

Table 14: Oil, Palm, Production, Supply and Distribution

Oil, Palm	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (1000 HA)	0	0	0	0	0	0
Area Harvested (1000 HA)	129	129	129	129	129	129
Trees (1000 TREES)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	2419	2419	2615	2615	1898	1853
Production (1000 MT)	305	305	305	305	305	305
MY Imports (1000 MT)	8886	8886	7786	7786	9050	7314
Total Supply (1000 MT)	11610	11610	10706	10706	11253	9472
MY Exports (1000 MT)	5	5	8	3	3	3
Industrial Dom. Cons. (1000 MT)	650	650	650	650	650	650
Food Use Dom. Cons. (1000 MT)	8340	8340	8150	8200	8475	7200
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	8990	8990	8800	8850	9125	7850
Ending Stocks (1000 MT)	2615	2615	1898	1853	2125	1619
Total Distribution (1000 MT)	11610	11610	10706	10706	11253	9472
Yield (MT/HA)	2.36	2.36	2.36	2.36	2.36	2.36

(1000 HA) ,(1000 TREES) ,(1000 MT) ,(MT/HA)
 OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Data source for oil table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Trade: Post has adjusted its earlier estimate for MY 2025/26 palm oil imports from 7.1 MMT to 7.3 MMT, representing a 3 percent rise (See: [Oilseeds and Products Annual](#)). This upward revision is attributed to declining palm oil prices from October 2025 onwards, resulting from higher stock levels in Indonesia and Malaysia. The current prices have encouraged Indian buyers to secure additional palm oil contracts in November and for the following two months. Nevertheless, palm oil imports for MY 2025/26 are still projected to be six percent below the previous year, as buyers shift toward more affordable soybean and sunflower oils.

In contrast, Post has revised its estimate for palm oil imports in MY 2024/25 downward, from 8 MMT to 7.8 MMT. This adjustment reflects a reduced supply of Indonesian palm oil, driven by higher benchmark prices and Indonesia’s biodiesel policy. Consequently, the projected ending stock has also been lowered from 2 MMT to 1.8 MMT to account for the tighter supply.

As there are no significant market developments in the remaining oils, Post maintains the initial forecast from the 2025 annual report or estimates from subsequent updates.

Table 15: Oil, Coconut, Production, Supply and Distribution

Oil, Coconut Market Year Begins	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	900	900	900	900	900	904
Extr. Rate, 999.9999 (PERCENT)	0.63	0.63	0.63	0.63	0.63	0.63
Beginning Stocks (1000 MT)	118	118	104	104	93	104
Production (1000 MT)	570	570	570	570	570	573
MY Imports (1000 MT)	0	0	2	0	0	0
Total Supply (1000 MT)	688	688	676	674	663	677
MY Exports (1000 MT)	19	19	18	15	12	15
Industrial Dom. Cons. (1000 MT)	195	195	195	195	195	195
Food Use Dom. Cons. (1000 MT)	370	370	370	360	370	363
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	565	565	565	555	565	558
Ending Stocks (1000 MT)	104	104	93	104	86	104
Total Distribution (1000 MT)	688	688	676	674	663	677
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oil table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Table 16: Oil, Cottonseed, Production, Supply and Distribution

Oil, Cottonseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	9400	9400	8800	9000	8850	8800
Extr. Rate, 999.9999 (PERCENT)	0.14	0.14	0.14	0.14	0.14	0.14
Beginning Stocks (1000 MT)	37	37	46	46	25	35
Production (1000 MT)	1355	1355	1268	1335	1275	1290
MY Imports (1000 MT)	0	0	1	5	5	5
Total Supply (1000 MT)	1392	1392	1315	1386	1305	1330
MY Exports (1000 MT)	1	1	0	1	0	1
Industrial Dom. Cons. (1000 MT)	55	55	40	50	40	50
Food Use Dom. Cons. (1000 MT)	1290	1290	1250	1300	1240	1246
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	1345	1345	1290	1350	1280	1296
Ending Stocks (1000 MT)	46	46	25	35	25	33
Total Distribution (1000 MT)	1392	1392	1315	1386	1305	1330
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oil table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Table 17: Oil, Peanut, Production, Supply and Distribution

Oil, Peanut	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
Market Year Begins	USDA	New	USDA	New	USDA	New
India	Official	Post	Official	Post	Official	Post
Crush (1000 MT)	3400	3400	3800	4100	4000	4200
Extr. Rate, 999.9999 (PERCENT)	0.33	0.33	0.33	0.33	0.33	0.33
Beginning Stocks (1000 MT)	264	264	187	155	200	236
Production (1000 MT)	1123	1123	1256	1355	1323	1400
MY Imports (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	1387	1387	1443	1510	1523	1636
MY Exports (1000 MT)	195	195	233	105	100	110
Industrial Dom. Cons. (1000 MT)	10	10	10	10	10	10
Food Use Dom. Cons. (1000 MT)	995	1027	1000	1159	1170	1280
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	1005	1037	1010	1169	1180	1290
Ending Stocks (1000 MT)	187	155	200	236	243	236
Total Distribution (1000 MT)	1387	1387	1443	1510	1523	1636
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oil table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Table 18: Oil, Soybean, Production, Supply and Distribution

Oil, Soybean	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	11300	11600	11000	10542	9275	9500
Extr. Rate, 999.9999 (PERCENT)	0.18	0.18	0.18	0.18	0.18	0.18
Beginning Stocks (1000 MT)	597	597	748	752	1527	765
Production (1000 MT)	2034	2100	1980	1920	1670	1710
MY Imports (1000 MT)	3308	3308	5471	4300	4250	4687
Total Supply (1000 MT)	5939	6005	8199	6972	7447	7162
MY Exports (1000 MT)	16	16	27	20	15	20
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	5175	5237	6645	6187	6570	6392
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	5175	5237	6645	6187	6570	6392
Ending Stocks (1000 MT)	748	752	1527	765	862	750
Total Distribution (1000 MT)	5939	6005	8199	6972	7447	7162
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oil table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Table 19: Oil, Sunflowerseed, Production, Supply and Distribution

Oil, Sunflowerseed	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
India	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Crush (1000 MT)	95	95	100	95	100	95
Extr. Rate, 999.9999 (PERCENT)	0.37	0.37	0.38	0.37	0.38	0.37
Beginning Stocks (1000 MT)	530	530	534	534	522	530
Production (1000 MT)	36	36	38	36	38	36
MY Imports (1000 MT)	3516	3516	2905	2600	2950	2200
Total Supply (1000 MT)	4082	4082	3477	3170	3510	2766
MY Exports (1000 MT)	23	23	55	10	20	10
Industrial Dom. Cons. (1000 MT)	0	0	0	0	0	0
Food Use Dom. Cons. (1000 MT)	3525	3525	2900	2630	3050	2226
Feed Waste Dom. Cons. (1000 MT)	0	0	0	0	0	0
Total Dom. Cons. (1000 MT)	3525	3525	2900	2630	3050	2226
Ending Stocks (1000 MT)	534	534	522	530	440	530
Total Distribution (1000 MT)	4082	4082	3477	3170	3510	2766
(1000 MT) ,(PERCENT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Data source for oil table: OAA New Delhi historical data series. Post forecast for 2025/26; 2024/25 and 2023/24 are estimates.

Attachments:

No Attachments