3rd Production Estimates (Final Estimates)

SEA Castor Crop Survey: 2024-25

Conducted by

Indian Agribusiness Systems Ltd, New Delhi (AgriWatch)

Submitted to

THE SOLVENT EXTRACTORS' ASSOCIATION OF INDIA
(A Premier Association of Vegetable Oil Industry & Trade)
ISO 9001: 2015 Organisation

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Executive Summary

- AgriWatch completed the 4th round of castor yield survey in May 2025 (last picking stage) to revalidate earlier yield estimates from the 1st round (Sep–Oct 2024, early vegetative–flowering stage), 2nd round (late Jan–early Feb 2025, capsule formation–early maturity–1st picking), and 3rd round (early–mid April 2025, 2nd and 3rd pickings). Weather data till May 31 was also reviewed to assess any final yield influence.
- Crop production estimation is based on government-reported acreage, while yield estimates have been derived from field observations and farmer feedback collected during the April- May survey rounds. Accordingly, production figures have been revised.
- In Gujarat, castor acreage declined to 646.3 thousand hectares (from 724.2 thousand hectares last year), with yield estimated at 1,942 kg/ha (down from 2,174 kg/ha). The slight yield improvement over the second estimate reflects field-level feedback during the final survey round. Total production is revised to 12.55 lakh tonnes, 2% higher than the second estimate, but remains lower than last year's 15.74 lakh tonnes.
- In Rajasthan, acreage reduced to 170 thousand hectares (from 192.5 thousand hectares last year), with yield estimated at 1,609 kg/ha, slightly up from the second estimate of 1,594 kg/ha, mainly based yield revalidation during last round of survey in May month. Total production is projected at 2.73 lakh tonnes, compared to 3.14 lakh tonnes last year.
- Andhra Pradesh and Telangana reported an acreage decline to 37.5 thousand hectares (from 60.1 thousand hectares last year). Yield remained stable at 1,440 kg/ha, and production is estimated at 54 thousand tonnes, down from 80.2 thousand tonnes last year, owing primarily to reduced acreage.
- At the national level, total castor acreage is estimated at 8.68 lakh hectares (compared to 9.88 lakh hectares last year), with an average yield of 1,833 kg/ha (lower than last year's 2,000 kg/ha). The reduction in yield reflects early-season weather disturbances affecting sowing and resowing in key growing pockets, along with high temperatures in April. The final production estimate stands at 15.9 lakh tonnes, below 19.76 lakh tonnes in 2023–24.

Gujarat

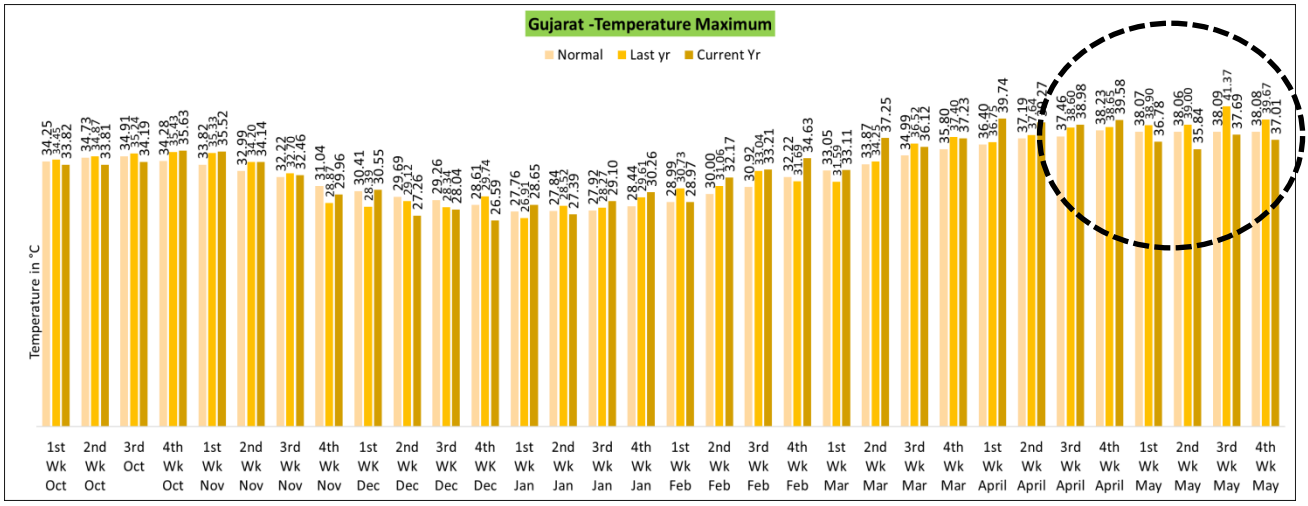
- Based on the 4th and final round of the survey, total castor production in Gujarat is revised and estimated to increase by 2% to 12.55 lakh tonnes, compared to the 2nd estimate of 12.26 lakh tonnes. However, production for the 2024–25 season is expected to be 20% lower than last year's 15.74 lakh tonnes.
- Total sown area remains unchanged from the first estimate for 2024–25 at 6.46 lakh hectares, reflecting an 11% decline from 7.24 lakh hectares in 2023–24 (Government estimate).
- Average yield in Gujarat improved by 2% in the final estimate compared to the second estimate, rising from 1,897 kg/ha to 1,942 kg/ha. This improvement is primarily attributed to field observations and feedback from farmers during the final round of the survey in May.
- The castor crop was harvested across most regions before the first week of May, so the rainfall and lower temperatures during May month did not have any impact on yield.
- The slight increase in yield observed in the final estimate is based on final round of re validation survey of the farmers during May, which indicated better-than-expected performance as reported during March/April survey, especially in pockets where farmers had extended the picking window.

District wise Area, Yield and Production of Castor Seeds in Gujarat for 2024-25 (3rd Estimates)

S.No.	Districts	Acreage 2023-24 State Govt ('000 Ha)	Acreage 2024-25 State Govt ('000 Ha)	Acreage 2024-25 Remote Sensing ('000 Ha)	Yield 2023-24 (kg/ha)	1st Est Yield 2024-25 (kg/ha)	2nd Est Yield 2024-25 (kg/ha)	3rd Est Yield 2024-25 (kg/ha)	Production 2023-24 ('000 MT)	1st Production EST 2024-25 ('000 MT)	2nd Production EST 2024-25 ('000 MT)	3rd Production EST 2024-25 ('000 MT)
1	Ahmedabad	41.5	33.7	38.3	2,089	2,088	1,736	1,803	86.7	70.4	58.5	60.8
2	Aravalli	13.9	12.1	9.9	2,305	2,284	1,920	1,960	32.0	27.6	23.2	23.7
3	Banaskantha	90.7	103.5	98.2	2,203	2,396	2,040	2,086	199.8	248.1	211.2	216.0
4	Gandhinagar	21.3	20.5	23.7	2,009	2,099	1,703	1,734	42.8	43.1	35.0	35.6
6	Kutch	190.3	162.7	159.2	2,188	2,292	1,776	1,837	416.3	372.8	288.9	298.8
5	Kheda	11.1	9.6	9.8	2,026	2,127	1,785	1,814	22.5	20.3	17.1	17.3
7	Mehsana	88.7	92.4	84.2	2,192	2,325	1,999	2,035	194.4	214.8	184.7	188.0
8	Morbi	7.5	6.0	6.3	2,146	2,168	1,864	1,901	16.1	13.0	11.2	11.4
9	Patan	98.9	85.7	83.9	2,155	2,315	2,058	2,105	213.1	198.4	176.4	180.4
10	Sabarkantha	25.2	26.4	27.4	2,295	2,309	2,027	2,018	57.8	60.8	53.4	53.2
11	Surendranagar	67.1	42.3	52.5	2,205	2,211	1,796	1,838	148.0	93.4	75.9	77.7
12	Vadodara	42.1	28.7	21.6	2,227	2,279	1,881	1,914	93.8	65.3	53.9	54.8
Total of Surveyed Districts		**698.3**	**623.4**	**615.0**	**2,181**	**2,291**	**1,908**	**1,953**	**1,523.3**	**1,428.1**	**1,189.2**	**1,217.7**
Others		25.9	22.9	22.9	1,963	2,029	1,621	1,644	50.9	46.5	37.1	37.7
State total		**724**	**646**	**638**	**2,174**	**2,281**	**1,897**	**1,942**	**1,574**	**1,475**	**1,226**	**1,255**

Note: *Production is estimated based on Government-reported acreages for 2023–24 and 2024–25. Final estimates have been derived by incorporating all relevant weather parameters and ground survey information available up to 31st May 2025.*

Effect of Maximum temperature on yields- Gujarat



Note- Temperature for 13 surveyed districts considered.

- From the second week of February, maximum temperatures began rising across major castor-growing districts, becoming significantly higher by mid-March with an increase of around 3–4°C.
- This early rise in temperature during key crop stages negatively impacted castor yield by accelerating maturity and reducing the number of effective pickings.
- Late and re-sown crops in Gandhinagar, Kutch, Kheda, Mehsana, Patan, Sabarkantha, Surendranagar, and Vadodara suffered due to heat stress, falling short of farmers' expectations.
- Early sown crops in parts of Surendranagar and Vadodara were also affected by low initial plant population and subsequent high temperatures.
- Although rainfall occurred in the first week of May, accompanied by a 3–4°C drop in maximum temperature across major growing regions, the castor crop had already been harvested by this time in most areas, and thus the weather change did not have any significant impact on yield or quality.
- As a result, the May rains did not contribute to any yield improvement or additional pickings, and the final harvest output remained largely unaffected by the post-harvest weather conditions.

Rajasthan

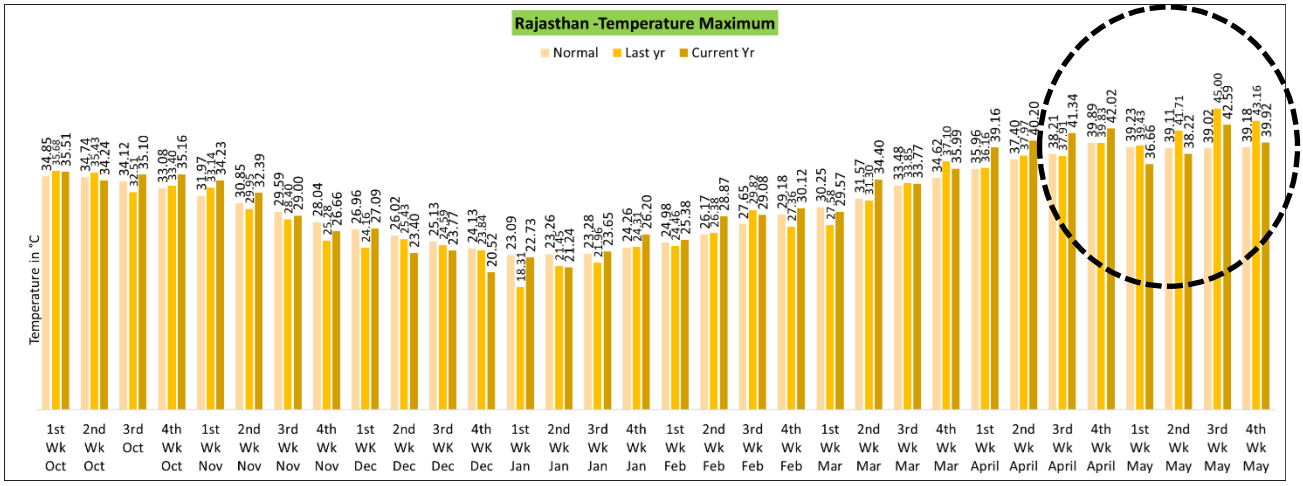
- Based on the fourth and final survey, total castor production in Rajasthan is estimated to increase by 1% over the second estimate — 2.74 lakh tonnes compared to 2.71 lakh tonnes earlier. However, production is still expected to be 13% lower than last year.
- Average yield in Rajasthan increased by 1%, rising from 1,594 kg/ha to 1,609 kg/ha compared to the second estimate.
- Total castor acreage in Rajasthan for 2024–25 stands at 1.70 lakh hectares, reflecting a 12% decline from 1.93 lakh hectares in 2023–24 (Government estimate). *(Note: The State Government's Kharif estimate shows a sudden rise to 2.03 lakh hectares, which appears unjustified based on remote sensing analysis. Hence, the earlier acreage figure has been retained.)*
- The slight increase in yield and production is primarily attributed to field observations and farmer feedback during the final survey, indicating better-than-expected performance during the last pickings, especially in pockets of Jalore, Jodhpur, and Sirohi, where some farmers extended harvesting.
- Rainfall and lower temperatures in May had no impact on the crop, as the castor crop harvesting was already completed across the state by that time.
- In contrast, Barmer district faced moisture stress and high temperatures during the critical crop stages in March-April, which resulted in relatively lower yields in that region.

District wise Area, Yield and Production of Castor Seeds in Rajasthan for 2024-25 (3rd Estimates)

S.No.	Districts	Acreage 2023-24 State Govt ('000 Ha)	Acreage 2024-25 State Govt ('000 Ha)	Acreage 2024-25 Remote Sensing ('000 Ha)	Yield 2023-24 (kg/ha)	1st Est Yield 2024-25 (kg/ha)	2nd Est Yield 2024-25 (kg/ha)	3rd Est Yield 2024-25 (kg/ha)	Production 2023-24 ('000 MT)	1st Production EST 2024-25 ('000 MT)	2nd Production EST 2024-25 ('000 MT)	3rd Production EST 2024-25 ('000 MT)
1	Barmer	48.6	44.5	47	1,835	1,877	1,783	1,702	89.2	83.5	79.4	75.7
2	Jalore	66.4	52.6	61.2	1,543	1,566	1,519	1,561	102.4	82.4	79.9	82.1
3	Jodhpur	25.3	26.0	23.7	1,942	1,977	1,794	1,814	49.1	51.4	46.6	47.2
4	Sirohi	37.3	35.5	28.6	1,334	1,384	1,315	1,412	49.7	49.1	46.7	50.1
Total of Surveyed Districts		**177.6**	**158.6**	**160.5**	**1,635**	**1,680**	**1,593**	**1,609**	**290.5**	**266.5**	**252.6**	**255.1**
Others		14.9	11.4	6.8	1,570	1,630	1,613	1,614	23.4	18.6	18.4	18.4
State total		**193**	**170**	**167**	**1,630**	**1,677**	**1,594**	**1,609**	**314**	**285**	**271**	**274**

Note: *Production is estimated based on Government-reported acreages for 2023–24 and 2024–25. Final estimates have been derived by incorporating all relevant weather parameters and ground information available up to 31st May 2025.*

Effect of Maximum temperature on yields- Rajasthan



Note- Temperature for 4 surveyed districts considered.

- From the second week of February to mid-March, there was a continuous rise in maximum temperatures, reaching 3–4°C above normal, which adversely affected castor yields across most districts. The heat stress accelerated crop maturity, especially in late-sown areas, reducing the number of effective pickings.
- In districts like Barmer and Jodhpur, late-sown crops fell short of expectations as the elevated temperatures during key growth stages led to poor grain filling and lower productivity.
- By the first week of May, the castor crop had already been harvested in almost all regions. Therefore, the subsequent drop in temperatures and scattered rainfall did not have any impact on the crop's seed development, size, or productivity.
- The marginal yield improvement reflected in the final estimates is primarily based on farmer feedback and observations from the final survey round, rather than any influence from the weather conditions in May.

Andhra Pradesh & Telangana

- Since harvesting was completed in February, the yield and production figures have remained unchanged.
- Based on the third survey, total production in Andhra Pradesh and Telangana is expected to remain steady at 0.54 lakh tonnes, reflecting a 33% decline from 0.80 lakh tonnes in 2023-24, primarily due to reduced acreage.
- The current season yield is estimated at 1,440 kg/ha, showing an 8% increase compared to 1,334 kg/ha in 2023-24.
- Total castor acreage for 2024–25 stands at 37,500 hectares, marking a 38% decline from 60,100 hectares in 2023-24 (Government estimate).

District wise Area, Yield and Production of Castor Seeds in AP & Telangana for 2024-25

S.no.	Districts	Acreage 2023-24 State Govt ('000 Ha)	Acreage 2024-25 State Govt ('000 Ha)	Acreage 2024-25 Remote Sensing ('000 Ha)	Yield 2023-24 (kg/ha)	Yield 2024-25 (kg/ha)	Production 2023-24 ('000 MT)	Production 2024-25 ('000 MT)
1	Anantapur	28.1	15.9	17.3	1,228	1,368	35	22
2	Kurnool	19.7	11.1	10.9	1,472	1,537	29	17
3	AP-Others	10.7	9.4	9.1	1,350	1,453	14	14
4	Telangana	1.6	1.2	1.2	1,405	1,405	2	2
State Total		**60.1**	**37.5**	**38.5**	**1,334**	**1,440**	**80**	**54**

All India

- Gujarat, the largest castor-producing state, shows a decrease in acreage from 724.2 thousand hectares in 2023–24 to 646.3 thousand hectares in 2024–25. Yields declined to 1,942 kg/ha (third estimate) from 2,174 kg/ha last year. The slight improvement in yield over the second estimate is attributed to final round of field survey and farmer feedback. Total production for 2024–25 is estimated at 12.55 lakh tonnes, down from 15.74 lakh tonnes last year.

- In Rajasthan, acreage declined to 170 thousand hectares from 192.5 thousand hectares last year. Elevated temperatures during February–March affected yields by accelerating crop maturity and reducing pickings, particularly in Barmer and Jodhpur. A marginal yield improvement to 1,609 kg/ha over the second estimate was noted based on field observations in Jalore, Jodhpur, and Sirohi. Total production is estimated at 2.73 lakh tonnes, compared to 3.14 lakh tonnes last year.

- Andhra Pradesh and Telangana recorded a sharp drop in acreage from 60.1 thousand hectares to 37.5 thousand hectares. Yields remained stable at 1,440 kg/ha, but production declined to 54 thousand tonnes from 80.2 thousand tonnes last year, primarily due to reduced acreage.

- At the all-India level, castor acreage is estimated at 8.68 lakh hectares, down from 9.88 lakh hectares in 2023–24. The average yield declined to 1,833 kg/ha due to early-season weather stress, with the final estimate showing a slight improvement based on final round of survey observations. Total production is projected at 15.9 lakh tonnes, lower than 19.76 lakh tonnes last year.

State wise Area, Yield and Production of Castor Seeds in All India for 2024-25 (3rd Estimates)

S.No.	State	Acreage 2023-24 State Govt ('000 Ha)	Acreage 2024-25 State Govt ('000 Ha)	Acreage 2024-25 Remote Sensing ('000 Ha)	Yield 2023-24 (kg/ha)	1st Est Yield 2024-25 (kg/ha)	2nd Est Yield 2024-25 (kg/ha)	3rd Est Yield 2024-25 (kg/ha)	Production 2023-24 ('000 MT)	1st Production Est 2024-25 ('000 MT)	2nd Production Est 2024-25 ('000 MT)	3rd Production EST 2024-25 ('000 MT)
1	Gujarat	724.2	646.3	637.9	2,174	2,281	1,897	1,942	1,574.2	1,474.6	1,226.4	1,255.3
2	Rajasthan	192.5	170.0	167.3	1,630	1,677	1,594	1,609	313.9	285.0	271.0	273.5
3	AP/Telangana	60.1	37.5	38.5	1,334	1,440	1,440	1,440	80.2	54.0	54.0	54.0
Total Surveyed State		**976.8**	**853.8**	**843.7**	**2,015**	**2,124**	**1,817**	**1,854**	**1,968.2**	**1,813.6**	**1,551.4**	**1,582.9**
Others		11.5	13.7	14.0	636	636	509	509	8.0	8.7	7.0	7.0
India Total		**988**	**868**	**858**	**2,000**	**2,101**	**1,796**	**1,833**	**1,976**	**1,822**	**1,558**	**1,590**

Note: *Production is estimated based on Government-reported acreages for 2023–24 and 2024–25. Final estimates have been derived by incorporating all relevant weather parameters and ground information available up to 31st May 2025.*

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