

Turmeric Outlook –July 2020

Turmeric is an important spice grown in India since ancient times. It is referred as Indian saffron and commonly called as Haldi. India is the largest producer, consumer and exporter of turmeric in the world. The global production of turmeric is around 11 lakh tonnes per annum. India dominates the world production scenario contributing 80% followed by China (8%), Myanmar (4%), Nigeria (3%) and Bangladesh (3%). Major turmeric importing countries from India are Bangladesh (15,888.88 tonnes), Iran (11,859.50 tonnes), Morocco (7,225.72 tonnes), USA (6,318.45 tonnes) and UAE (5,938.10 tonnes).

In India during 2019-20, about 2.54 lakh ha (6 lakh acres) area was covered under turmeric. The important turmeric growing states in India are Telangana 55,443 ha (1,37,000 acres), Odisha 27,864 ha (68,852 acres), Tamil Nadu 18,296 ha (45,209 acres), West Bengal 17,711 ha (43,764 acres), Karnataka 17,598 ha (43,895 acres), Assam 16,550 ha (40,895 acres), Maharashtra 14,511 ha (35,857 acres) and Andhra Pradesh 13,223 ha (32,674 acres).

In Telangana during the year 2019-20, area covered under turmeric was 0.55 lakh hectares (1.37 lakh acres) as against 0.53 lakh hectares (1.31 lakh acres) in the corresponding period of last year. Major turmeric growing districts in Telangana are Jagtial 13,707 ha (33,870 acres), Nizamabad 13,549 ha (33,480 acres), Nirmal 8,005 ha (19,780 acres), Warangal (Rural) 4,612 ha (11,396 acres) and Mahabubabad 4,424 ha (10,932 acres). According to 3rd advance estimates, turmeric production in Telangana State during 2019-20 was 3.07 lakh tonnes with productivity of 5543 Kg/ha (2243 Kg/acre).

Table 1: Turmeric Arrival Scenario in India (in bags of 65 Kg each)

Market	% Change over Previous Week	19 th June to 25 th June 2020	12 th June to 18 th June 2020	19 th June to 25 th June 2019
Nizamabad	-26.09	34,000	46,000	18,000
Duggirala	42.31	37,000	26,000	17,000
Salem	147.22	89	36	336
Erode	-26.55	13,000	17,700	19,500
Sangli	--	NA	NA	50,000
Warangal	-6.68	54,500	58,400	15,000
Total	-6.44	138,589	148,136	119,836

Source: www.agriwatch.com

Table 2: Turmeric Spot Prices (Rs/q)

State	Centre	Grade	% Change Over Previous Week	25-June-20	18-June-20	25-Apr-20	29-June-19
Telangana	Nizamabad	Nizam quality	3.64	5700	5500	Closed	6300
		Double polish finger	4.69	6700	6400	Closed	7300
		Gattah (unpolished)	1.89	5400	5300	Closed	6000
		Gattah (double polished)	3.23	6400	6200	Closed	7000
	Warangal	Finger	10.64	5200	4700	Closed	6200
		Round	13.95	4900	4300	Closed	5800
Tamil Nadu	Erode	Finger	Unchanged	6500	6500	6200	6600
		Gattah	1.72	5900	5800	5600	6100
		Sellem	2.78	7400	7200	6600	7600
	Coimbatore	Bulb	Unchanged	5500	5500	NR	0
		Finger	Unchanged	6500	6500	NR	0
	Salem	Bulb	--	NR	NR	NR	0
Finger		--	NR	NR	NR	6450	
Andhra Pradesh	Duggirala	Bulb	-3.00	4850	5000	5150	5700
		Bilty	-3.00	5287	5450	5614	6213
		Finger	-11.82	4850	5500	5150	5700
		Bilty	-11.82	5287	5995	5614	6213
Maharashtra	Sangli	Rajpuri/Salem Finger	16.00	8700	7500	Closed	9000
		Rajpuri Medium	3.08	6700	6500	Closed	7800
		DesiKadappa	9.62	5700	5200	Closed	6000
	Nanded	Turmeric Finger Polished	3.33	6200	6000	5500	6800
		Turmeric Bulb Polished	7.41	5800	5400	5000	6300
		Turmeric Mix	7.55	5700	5300	5000	6000

Source: Agriwatch.com

In Nizamabad market during current year (2020), Turmeric arrivals are reported around 76,048 MT from 2nd January till 25th June compared to last year same period 94,388 MT, i.e., 19.43% down from last year. Last year total Turmeric supply in Nizamabad market from 1st January 2019 to 31st December 2019, stands at around 97,342 MT as compared to 86,842 MT in the corresponding period of previous year, supply up by 12.09%. In Warangal spot market, new crop supply continued in the spot market, on an average daily basis 6,000 – 7,000 bags were reported. In Erode spot market, daily on an average 2,000 – 2,500 bags of turmeric new crop is

arriving. Andhra Pradesh Government started Turmeric procurement in Kadapa, Duggirala, Krishna, Kurnool and Nellore districts from 4th May till 16th June and around 21,880 MT was procured accounting for 44% of total production.

First freight rake being loaded from the state of Telangana to Bangladesh during the recent pandemic. So far, the turmeric produced from fields is transported by road to Bangladesh, which is expensive and time taking. With the continuous marketing efforts by Railways and after several discussions, consignors have come forward for loading the turmeric produce by Rail. Accordingly, the first rake has been loaded to Benapole in Bangladesh with 42 wagons weighing around 2,474 tonnes.

Table 3: Turmeric (Bulb and Finger) Prices at Nizamabad Market in June 2020

Date	BULB				FINGER			
	Arrivals (Qtls)	Maximum Price (Rs/q)	Minimum Price (Rs/q)	Modal Price (Rs/q)	Arrivals (Qtls)	Maximum Price (Rs/q)	Minimum Price (Rs/q)	Modal Price (Rs/q)
1	2459	5721	4055	4886	5554	6162	4500	5025
2	1393	5206	4500	4856	3072	6339	4500	5050
3	3089	5189	4500	4860	5736	6291	4500	5050
4	2199	5279	4500	4848	4638	6329	4500	5056
8	3425	5267	4500	5020	5897	6289	4500	5150
9	2207	5812	4501	5190	4145	6395	4500	5250
10	1723	5349	4500	5060	3214	6409	4500	5252
11	2034	5349	4501	5058	3801	6211	4500	5222
15	2465	5367	4501	5025	5755	6265	4500	5222
16	2203	5400	4501	5090	5240	6363	4500	5182
17	2099	5347	4500	5115	4370	6421	4505	5262
18	2042	5391	4501	5255	3608	5955	4510	5316
19	1403	5487	4500	5169	2552	6415	4500	5355
23	2782	5603	4500	5255	4308	6468	4501	5358
24	1737	5850	4500	5255	3138	6866	4501	5550
25	1620	4500	5255	5699	2535	6866	4501	5555
26	1451	5628	4500	5355	2874	6285	4501	5712
29	2042	5680	4500	5440	4087	6556	4500	5650
30	1108	4500	5355	5549	2460	6262	4509	5678

Source: <http://tsmarketing.in>

Under these circumstances, Agricultural Market Intelligence Centre, PJTSAU expect that Turmeric is likely to trade in price range between **Rs. 5800 – 5900** per quintal during July 2020.