

Turmeric Outlook – September 2021

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%).

In 2020-21, India had exported 1.71 lakh tonnes of turmeric compared to 1.37 lakh tonnes of the previous year. Major turmeric importing countries from India are Bangladesh (49,522 tonnes), UAE (12,182 tonnes), Iran (10,964 tonnes), USA (9,712 tonnes) and Morocco (8,522 tonnes).

According to Government 2nd advance estimates, all India turmeric production in 2020-21 is at 11.02 lakh tonnes. The major states producing turmeric in India are Telangana (3.13 lakh tonnes), Maharashtra (2.26 lakh tonnes), Karnataka (1.30 lakh tonnes), Tamil Nadu (0.86 lakh tonnes), Andhra Pradesh (0.73 lakh tonnes), Madhya Pradesh (0.60 lakh tonnes) and West Bengal (0.45 lakh tonnes).

In Telangana during the year 2020-21, area covered under turmeric was 0.41 lakh hectares (1.01 lakh acres) as against 0.55 lakh hectares (1.37 lakh acres) in the corresponding period of last year. Major turmeric growing districts in Telangana are Jagtial, Nizamabad, Nirmal, Warangal and Mahbubabad. According to Telangana State Government 4th advance estimates, turmeric production in 2020-21 is at 2.64 lakh tonnes with productivity of 6439 Kg/ha (2606 Kg/acre).

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

Market	% Change over Previous Month	August 2021	July 21	August 2020
Nizamabad	-22.43	37,000	47,700	37,000
Duggirala	-50.54	4550	9200	23500
Salem	-56.25	0.7	1.6	312.4
Erode	-21.91	58,100	74,400	44,300
Sangli	-25.26	5680	7600	22500
Warangal	--	NA	NA	NA
Total	-24.17	1,05,331	1,38,902	1,27,612

Source: www.agriwatch.com

Table 2: Turmeric Spot Prices (Rs/q)

State	Market	Grade	% Change Over Previous Month	Aug 21	July 21	Aug 20
Telangana	Nizamabad	Nizam quality	4.11	7600	7300	5800
		Double polish finger	3.75	8300	8000	6700
		Gattah (unpolished)	4.62	6800	6500	5500
		Gattah (double polished)	2.74	7500	7300	6500
	Warangal	Finger	4.92	6400	6100	5600
		Round	5.26	6000	5700	5200
Tamil Nadu	Erode	Finger	1.41	7200	7100	6000
		Gattah	1.52	6700	6600	5600
		Sellem	1.33	7600	7500	6700
	Coimbatore	Bulb	Unchanged	8000	8000	5500
		Finger	Unchanged	8300	8300	6000
	Salem	Bulb	Unchanged	NA	NA	NA
Finger		-0.07	7075	7080	6150	
Andhra Pradesh	Duggirala	Bulb	-3.33	5800	6000	4900
		Bilty	-3.33	6322	6540	5341
		Finger	-3.33	5800	6000	4900
Maharashtra	Sangli	Rajpuri/Salem Finger	-3.33	6322	6540	5341
		Rajpuri Medium	-22.76	9500	12300	8500
		DesiKadappa	Unchanged	8700	8700	6500
	Nanded	Turmeric Finger Polished	4.17	7500	7200	6000
		Turmeric Bulb Polished	4.76	6600	6300	5600
		Turmeric Mix	6.25	6800	6400	5400

Source: www.agriwatch.com

Table 3: Turmeric (Bulb and Finger) Prices at Nizamabad Market in August 2021

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)
4	739	6,459	4,506	5,510	1,560	7,459	5,006	6,550
5	417	6,310	4,500	5,810	828	7,019	5,006	6,509
6	473	6,259	4,500	5,556	1,120	7,470	5,510	6,666
9	330	6,479	4,606	5,218	1,514	7,212	5,454	6,550
10	233	5,806	4,506	5,266	1,050	6,912	5,001	6,447
11	395	6,533	4,660	5,821	946	7,119	5,171	6,575
12	351	6,270	4,506	5,355	478	7,109	5,010	6,611
13	208	6,451	4,506	691	823	7,089	5,000	6,828
16	769	6,847	4,511	5,860	1,235	7,451	5,001	6,666
17	351	6,827	4,906	5,791	693	7,329	5,127	6,919
18	221	6,669	4,506	5,666	493	7,227	5,048	6,411
19	231	6,852	5,009	5,805	488	7,816	5,006	6,729
23	556	7,049	4,506	5,555	1,310	7,552	5,166	6,850
24	429	6,979	4,527	6,569	1,068	7,719	5,006	6,700
25	467	7,047	4,506	6,025	1,305	7,255	5,353	6,900
26	679	7,158	4,555	6,566	1,769	7,455	5,422	6,888
27	359	6,319	4,522	5,822	353	7,319	5,011	6,686
30	118	6,269	4,555	5,289	723	7,429	5,029	6,685

Source: <http://tsmarketing.in>

In Nizamabad market during the current year (2021), Turmeric arrivals were around 76,069 MT from 1st January 2021 till 31st August 2021 compared to 64,918 MT of the previous year, same period (17.18% up). In Maharashtra Sangli and Karnataka Belgaum districts, Turmeric standing crop was submerged due to recent floods. Around 10 to 12% area was affected. Overall area is likely to increase current year in Telangana, Andhra Pradesh, some parts of Maharashtra and Tamil Nadu. For the 2021-22 marketing period, Agriwatch expects 0.62 lakh MT ending stocks, which is lower than 0.98 lakh MT from last year. This may be attributed to lower production, as well as increasing exports and domestic consumption, is likely to support prices from the current level.

Under these circumstances, Agricultural Market Intelligence Centre, PJTSAU expects that Turmeric may trade in price range between **Rs. 6500 – 6800** per quintal during September 2021.