INTFLOAT
CONSULTING

SAMPLE EDITION

Indian Sal Seed *Report*

2 September 2026 · 5 of 12 pages

A preview of our monthly commodity research. This sample shows public-domain market data with a portion of our analysis. The full report includes price forecasts, balance sheets and procurement advice.

INSIDE THE FULL REPORT

- Season average price guidance for 2026
- Processor-wise procurement breakup
- Stockist activity and price-floor analysis
- State-wise production model
- 2027 crop outlook by bearing cycle

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Sal seed collection falls 13% as Jharkhand's crop slumps

India collected about 109 KMT of Sal seed in 2026, down from 126 KMT. Strong crops in Odisha and Chhattisgarh only partly offset a 59% fall in Jharkhand.

STATE	2025	2026	CHANGE
Odisha	28.09	**39.13**	+39%
Chhattisgarh	25.22	**35.27**	+40%
Jharkhand	56.89	**23.45**	-59%
Madhya Pradesh	9.81	**7.71**	-21%
Others	6.19	**3.68**	-41%

Sal seed collected, KMT

109 KMT

Sal seed collected in 2026, down 13.4% year on year

–59%

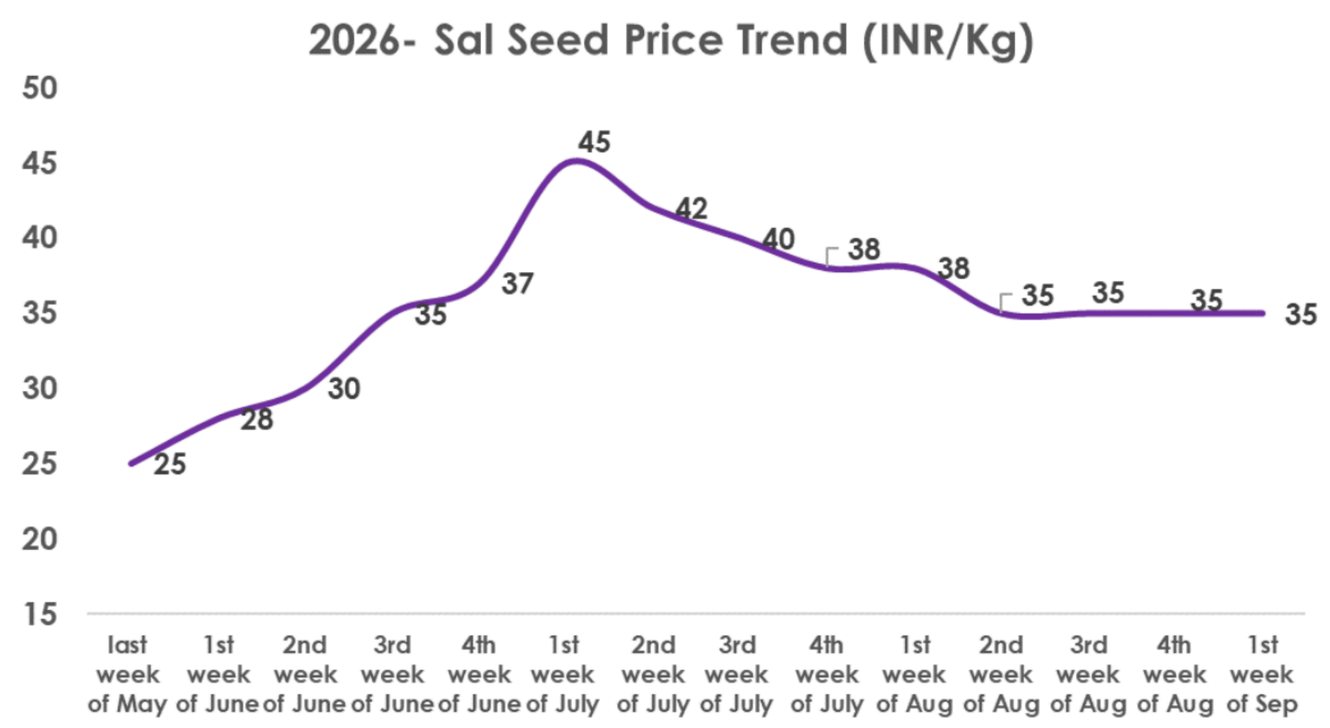
Fall in Jharkhand, the largest producer in 2025

- Odisha (+39%) and Chhattisgarh (+40%) had strong on-bearing crops.

Collection estimates: Intfloat Consulting field and trade sources.

Prices spiked to ₹45/kg before settling at ₹35/kg

Aggressive stocking and trader quotes above processors' buying levels drove a sharp early-season rally. Quality issues in August and cautious processor buying brought prices back down.



Sal seed price trend, 2026 season, ₹ per kg (weekly)

₹25 → ₹45

Price rise from late May to early July

₹35/kg

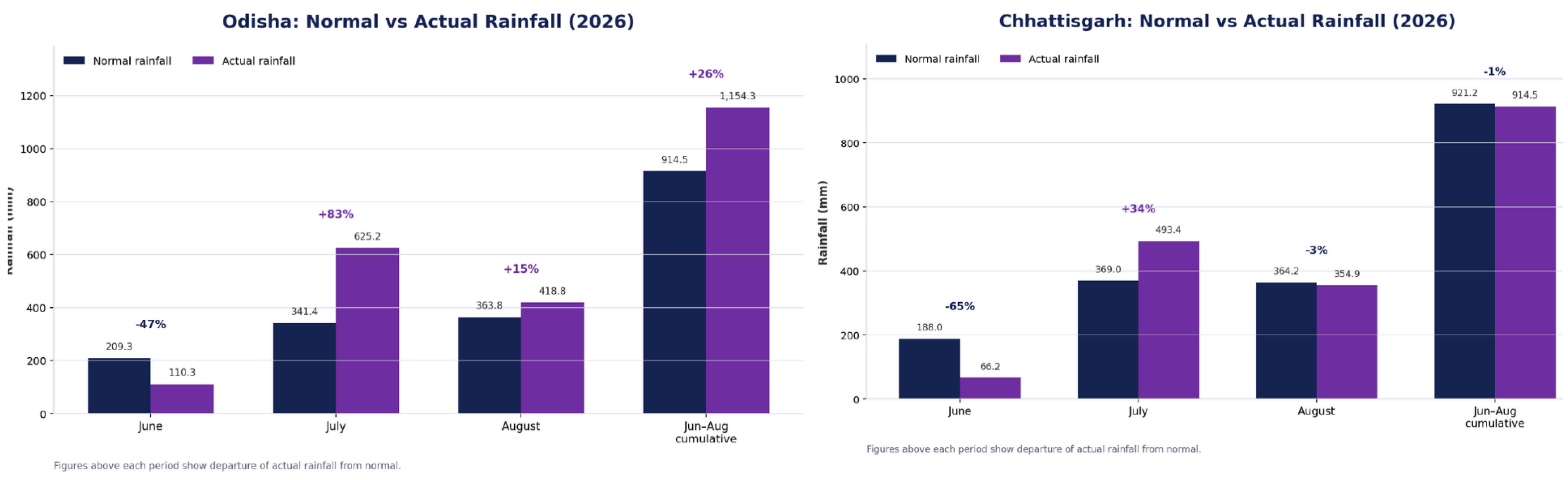
Price by early September after quality-related discounting

- About half of June’s traded material went to stockists, as local traders quoted ₹3–4/kg above processors.

SAMPLE EDITION

Good monsoon rains support Sal tree growth

Odisha and Chhattisgarh saw above-normal July rains, which help soil moisture and vegetative growth ahead of next season.



Normal vs actual rainfall, June–August 2026, mm: Odisha (left) and Chhattisgarh (right)

+26%

Odisha rainfall above normal, June–August cumulative

+34%

Chhattisgarh rainfall above normal in July

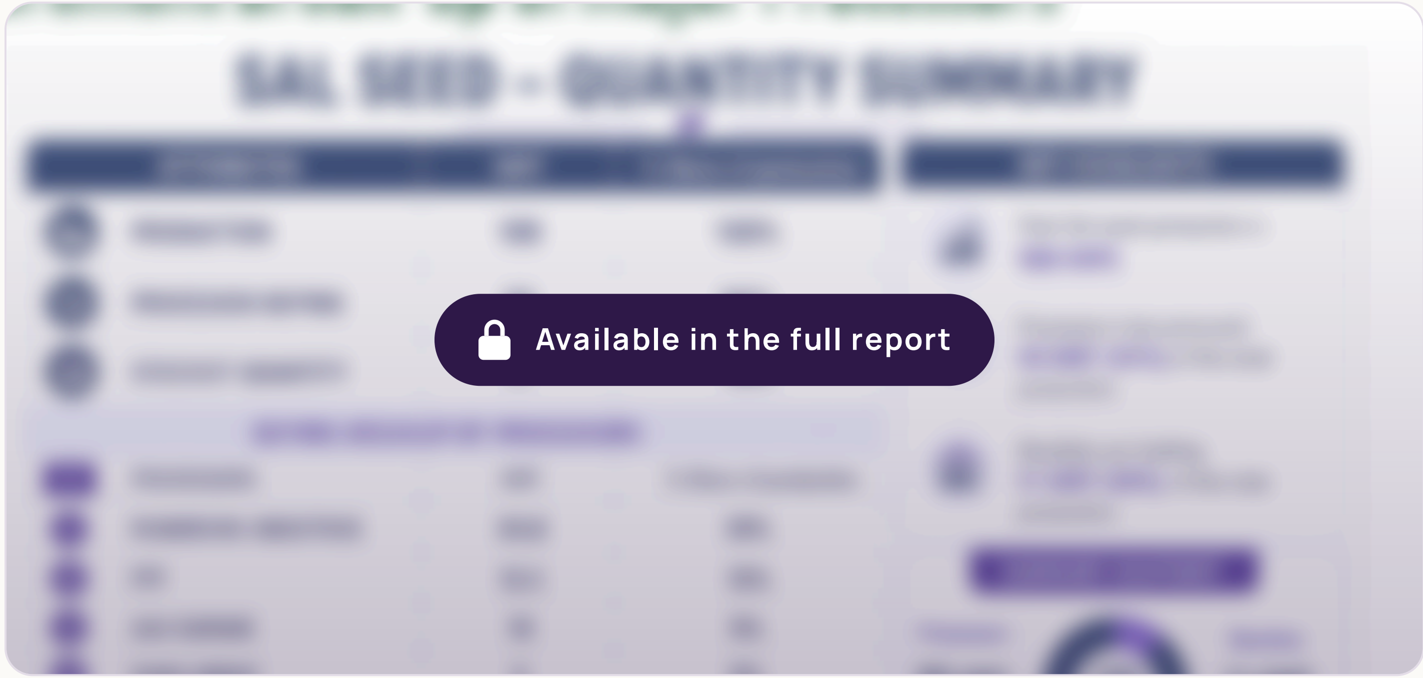
- Rainfall helps growth, but Sal's alternate-bearing cycle remains the main driver of seed output.

What the full report tells you

This sample covers the public data. Our subscribers also get the forecasts, balance sheets and buying strategy built on it.

A GLIMPSE OF OUR ANALYSIS

Processors have already bought about 90% of the 2026 crop, leaving stockists with only around 10%. What that means for prices and the 2027 crop is in the full report.



- **Season average price guidance**
  Our 2026 price benchmark for procurement planning
- **Processor-wise procurement breakup**
  Volumes and market share by major processor
- **Stockist activity analysis**
  How June stocking may set next season's price floor
- **State-wise production model**
  Area, trees, yield and collection by state
- **2027 crop outlook**
  Bearing-cycle view for Odisha, Chhattisgarh, Jharkhand and MP

Get the full report

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