

Preview of Comprehensive Castor Oil Report

A report on castor oil & castor oil derivatives

CastorOil.in

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An Invaluable Guide to the Castor Oil and Castor Oil Derivatives Industry

Castor oil is possibly the plant oil industry's most underappreciated asset. It is one of the most versatile of plant oils, being used in over ten diverse industries. Owing to its unique chemical structure, castor oil can be used as the starting material for producing a wide range of end-products. The plant itself requires relatively less fertilizers, pesticides, water and maintenance than most other cultivated crops, and it can grow in marginal land. With so many unique advantages, one would expect the castor crop to be widely grown world over. Strangely, it is not so.

This is all set to change, as many companies, entrepreneurs and governments are waking up to the potential of the castor crop, castor oil and castor oil derivatives. In the past few years alone, a number of countries which have little or no land under castor cultivation have started making serious exploratory efforts at growing castor. A number of companies are doing cutting edge research on the use of castor to produce bioplastics and biopolymers such as polyurethane, nylon and more. With the increasing use of biolubricants and bio-greases, castor oil is emerging as the preferred feedstock choice, owing to the already prevalent applications of castor oil derivatives for these purposes.

These accelerated research and commercial efforts in castor oil require a comprehensive information support resource that will ensure that all the relevant and critical information on the product, industry and market are available to the relevant entities. The Comprehensive Castor Oil Report was developed in order to satisfy this clear need.

The Comprehensive Castor Oil Report is the most detailed report dealing with all aspects of the castor oil industry. The report focuses on providing detailed insights on the following aspects:

Production

- detailed inputs on the technology and processes for producing all major castor oil derivatives

Market segments

- inputs on the key end-user market segments

Cultivation

- extensive details on the critical aspects of castor crop cultivation

Companies

- profiles and details on the leading companies in this industry

The objective of the Comprehensive Castor Oil Report is to facilitate tangible steps for a castor oil venture. The emphasis hence is on providing practical data, updates and insights.

The report has been developed with over three years of in-depth research, and has been developed with inputs from castor oil industry experts, chemical engineering researchers, and professionals who have been constantly interacting with the castor oil industry for over a decade.

The Comprehensive Castor Oil Report will be an invaluable guide to those keen on venturing into an industry with exciting future potential.

Chapter 1 Castor Oil Manufacturing

The production process for the basic grades of castor oil are well known and well established. There are however a number of innovative processes and emerging technologies for the production of value added castor oil chemicals and derivatives. This chapter provides detailed inputs on the production processes of castor oil, its basic grades and for a diverse range of castor oil based derivatives and chemicals.

Key Sections

1.1 Key Manufacturing Processes for Castor Oil & Derivatives

1.1.1 Castor Oil Manufacturing Processes – Summary

- Castor Oil Extraction – Summary
- Castor Oil Filtration & Purification - Summary
- Castor Oil Refining - Summary
- Production of Castor Oil Grades & Derivative Chemicals - Summary

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Production Process for Dehydrated Castor Oil

Dehydrated Castor Oil

Castor oil has only one double bond in each fatty acid chain and so is classified as non-drying oil. However, it can be dehydrated to give semi-drying or drying oil which is used extensively in paints and varnishes. Being a polyhydroxy compound, its hydroxyl functionality can be reduced through dehydration or increased by inter-esterification with a polyhydric alcohol.

It must be noted that coatings that incorporate castor oil alone will never achieve complete cure through oxidative cross-linking as do coatings that contain oil with multiple double bonds in their fatty acid components. For this reason, dehydrated castor oil assumes special significance.

The dehydration process is carried out at about 250°C in the presence of catalysts (e.g., concentrated sulphuric acid, activated earth) and under an inert atmosphere or vacuum. Under this condition of dehydration, the hydroxyl group and adjacent hydrogen atom from the C-11 or C-13 position of the ricinoleic acid portion of the molecule is removed as water. This yields a mixture of two acids, each containing two double bonds but in one case, they are conjugated. The presence of an acid containing conjugated double bonds results in an oil resembling tung oil in some of its properties. Thus, castor oil, which is non-drying, can be treated and converted into a semi-drying or drying oil known as dehydrated castor oil.

Details of manufacturing the following castor oil grades & derivatives are also explained in this chapter

- Industrial / Commercial Castor Oil
- First Special Grade Castor Oil
- Cold Pressed Castor Oil
- Pale Pressed Castor Oil
- Pharma Grade Castor Oil
- Hydrogenated Castor Oil
- Sulfonated Castor Oil
- Blown Castor Oil
- Ricinoleic Acid
- 12-HSA
- Methyl 12-HSA
- Sebacic Acid
- Undecylenic Acid
- Methyl Ricinoleate
- Methyl Undecylenate
- 2-Octanol
- Heptaldehyde, Heptanoic Acid & Heptyl Alcohol

Chapter 2 Castor Oil Market

The end user market for castor oil and castor oil derivatives is already quite diverse. With new applications of castor oil being explored, especially in areas such as pharmaceuticals and biopolymers / bioplastics, these end user markets for castor oil and its derivatives are expected to expand significantly over the next few years. This chapter provides insights into the characteristics and dynamics of the castor oil, chemicals and derivatives markets, supported by rich data and analysis. A detailed demand-supply analysis of the key castor oil chemicals and derivatives is also provided.

Key Sections

2.1 Value Chain for the Castor Industry

2.2 The Castor Oil Market

- Characteristics of Castor Seed and Oil Market
- Market Influencing Factors in Castor Trade

2.3 Supply & Demand of Castor Oil

- Castor Oil Production (in '000 T) – Jan 2005 to Dec 2009
- Castor Oil Imports ('000 T) – Jan 2005 to Dec 2009
- Castor Oil Exports ('000 T) - Jan 2005 to Dec 2009
- Summary of Production, Imports and Exports from Prominent Countries/Regions 2009 data (in '000 Tons)
- Castor seed - World Area, Production and Productivity – 2010-11
- India Castor Seed Area, Production and Yield
- Country-wise production of castor seed in the world
- The US Supply Scenario
- Castor Oil Production from Minor Producing Countries

2.4 Indian Castor Oil Industry

2.4.1 Castor Oil Exports - Historical Scenario (2000 – 2007)

2.4.2 Castor Oil Exports - Current Scenario (2008-11)

2.4.3 Castor Seed Production & Acreage in India

- Castor Growing Areas in India & its Production
- Major Trading Centers of Castor in India

2.4.4 India-wide Data from Castor Crop Survey 2009-10

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2.4.7 India's Status in the Global Castor Oil Industry

2.5 Demand-Supply Estimates for Castor Oil Derivatives

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2.5.2 Future Demand-supply Estimates for the Various Grades of Castor Oil and Derivatives

- Growth of Key End-User Segments
- Growth Prospects for Bio-based Products
- Demand-Supply Estimates

2.3 Supply & Demand of Castor Oil

Castor Oil Production (in '000 T)

Countries	Jan-Dec 2009	Jan-Dec 2008	Jan-Dec 2007	Jan-Dec 2006	Jan-Dec 2005
Russia	1.0	1.0	1.0	1.0	1.0
Ethiopia	2.3	2.4	2.0	1.5	1.5
Brazil	42.5	52.3	43.3	48.7	70.2
China,PR	81.4	83.1	81.5	90.2	101.7
India	375.8	413.0	367.6	351.2	335.2
Thailand	5.4	5.7	5.6	5	4.5
Oth countries	24.4	23.8	22.5	21.9	21.2
Total	531.8	580.3	522.6	518.5	534.3

Source – CastorOil.in and derived from data obtained from sources such as Oilworld - www.oilworld.biz

*Summary of Production, Imports and Exports from Prominent Countries/Regions
2009 data (in '000 Tons)*

Country	Production
India	375.8
China	81.4
Brazil	42.5
Total	499.7
Country	Imports
China	124.2
Europe (27)	87.2
USA	32.1
Japan	13
Thailand	12
Total	268.5
Country	Exports
India	280
USA	6.7
EU (27)	1.9
Brazil	0.9
Total	289.5

Source – CastorOil.in and derived from data obtained from sources such as Oilworld - www.oilworld.biz

Future demand-supply estimates for the various grades of castor oil and derivatives

Growth of Key End-User Segments

The major end-use industries for castor oil derivatives castor oil are:

- Lubricants & Greases
- Coatings
- Personal Care & Detergent
- Surfactants
- Oleochemicals

Growth of Key End-user Industry Segments for Castor Oil Derivatives

Industry	% Growth (CAGR), based on 2005 data	Potential
Lubricants & Greases	2	44 million T by 2012
Coatings	4.9% (about 11% in Asia!)	-
Personal Care & Detergent	6%	\$375 billion by 2012
Surfactants	4%	\$16.65 billion by 2012
Oleochemicals	4%	8.5 million T by 2012

Detailed information on castor oil market, castor oil production worldwide and current and future demand- supply estimates of castor oil and its derivatives are provided in this chapter. The chapter also talks in detail about the castor industry in India.

India Export of Castor Oil (Excluding Derivatives)

Year April-March	Quantity M.T	Value Rs.Cr
2000-01	227,033	806.07
2001-02	204,877	556.22
2002-03	163,862	520.85
2003-04	161,619	603.27
2004-05	208,176	788.56
2005-06	182,159	627.43
2006-07	186,610	653.05
2007-08	176,177	757.29
2008-09*	308,625	1821.57
2009-10*	345,333	1780.31
2010-11* (Apr'10-Jan'11)	305,513	1795.50

Source: SEA Data Bank

* Including bulk and container

Country-wise production of castor seed in the world

Country	Area ('000 ha)	Production (000' t)	Yield (kg/ha)
Angola	13.5	3.5	259
Brazil	156.4	120.5	770
China PR	225.0	220.0	978
Ethiopia	6.8	7.0	1029
Haiti	2.9	1.6	552
India	880	1123.0	1276
Indonesia	6.0	1.0	167
World	1524.7	1580.6	1037.0

Source: Adapted from Global Castor Conference, 2011

Chapter 3 Castor Oil Chemicals & Derivatives

Castor oil derives its unique properties from its distinct chemical structure. Many of the valuable derivatives of castor oil also owe their advantages to this unique structure. Data on the chemical structure and composition of the derivative are crucial to determine its suitability for specific applications and end uses. This chapter provides detailed inputs on the chemical structures, compositions and properties of castor oil, its various grades, and the diverse chemicals and derivatives.

Key Sections

3.1 Introduction

- Castor Plant Chemistry
- Summary List of Key Derivatives of Castor Oil

3.2 Properties & Chemical Composition of Castor Oil

- Castor Oil Chemistry and Composition
- Castor Oil Composition vs. Composition of Other Vegetable Oils
- Properties

3.3 Chemical, Physical Properties & Specifications of Castor Oil Grades & Derivatives

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Chemical, Physical Properties & Specifications of Castor Oil Grades & Derivatives

Commercial Grade Castor Oil

Appearance	Pale Dark Yellow
Colour in 1" Cell, Y+5R Lovibond	30 units max.
Iodine Value	82 – 90
Saponification Value	177 – 187
Hydroxyl Value	160 min.
Acid Value	2.0 max.
Moisture & Volatiles	0.50% max.
Specific Gravity @ 20° C	0.954 – 0.967

BP Grade Castor Oil

CAS No	8001-79-4
EINECS	292-293-8
Colour	Nearly Colourless or Faintly Yellow
Relative Density at 20°C	0.952-0.965
Moisture	0.3% max.
Iodine Value	82-90
Saponification Value	176-187
Acid Value	2.0 max.
Unsaponifiables w/w	0.8% max.
Optical Rotation	between +3.5° and 6.0°
Hydroxyl Value	150 min.
Peroxide Value	5.0 max
Light Absorption	1.0 max

Detailed insights on unique properties of castor oil and its derivatives are provided in this chapter.

Chapter 4 Castor Oil Prices

Castor oil and castor seeds are known for the volatility in their prices. Castor crop cultivators, castor oil derivatives producers, and consumers have a critical need to factor in this price volatility in their business modeling and planning. This chapter provides detailed inputs on the historical prices and price variations of castor seeds and castor oil, and also an analysis of factors that are responsible for this volatility.

Key Sections

4.1 Historical & Current Price Data for Castor Oil, Castor Seeds

- Castor Seed Prices
- Castor Oil Prices
- A Snapshot of Castor Seed, Castor Oil & Castor Cake Prices in Jul/Aug 2008 and Jan 2009

4.2 Castor Oil and Castor Seed Price Volatility

- Pricing Pattern
- Rationale for the Castor Seed Contract
- Importance of Castor Seed and Castor Oil Futures

4.3 Factors that Affect Prices

- Characteristics of Castor Seed and Oil Market
- Market Influencing Factors in Castor Trade

4.4 Castor Oil Futures Market

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Historical & Current Price Data for Various Grades of Castor Oil, Castor Seeds

Castor Oil Prices (average price for commercial grade) – US\$/T, FOB Mumbai

Year	2002	2003	2004	2005	2006	2007	2008 (Feb)	2008 (Jun)	2009 (Jan)	2009 (Jun)	2010 (Jan)
Price	675	925	850	925	775	1025	1160	1350	1050	1104	1330

A Snapshot of Castor Seed, Castor Oil & Castor Cake Prices in Jul/Aug 2008 and Jan 2009

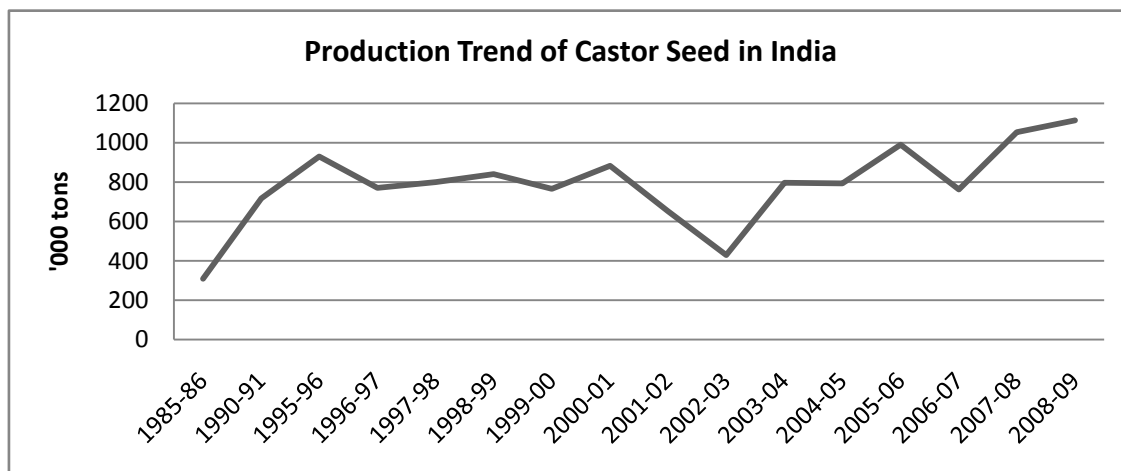
All castor products hit a record high in Jul/Aug 2008. A look at the average prices below will tell the story.

All prices in US \$ / Metric Ton, FOB India

Product	Price
Castor seed	700
Castor oil	1500
Castor cake	110

Rationale for the Castor Seed Contract

There is significant fluctuation in the production of castor seeds in India. The market participants like the farmers, traders, oil millers, exporters and industries which produce value added derivatives face an eternal price risk due to fluctuating production. Hence it is imperative to introduce a hedging mechanism for efficient price discovery and price dissemination.



Historical and current price details are provided for castor seed and oil. This chapter also talks about price volatility in castor seed & oil and the factors that affect prices and influence castor trade.

Chapter 5 Castor Cultivation

Compared to many other crops, castor crop requires relatively fewer inputs such as water, fertilizers and pesticides. The crop can also be grown on marginal land, thus providing an excellent opportunity for many regions of the world to utilize their land resources more productively. At the same time, following proper procedures during sowing and maintenance will result in much high crop yields than otherwise. In addition, use of high-yield hybrid varieties also can have a positive effect on crop and seed yields. This chapter provides critical inputs on all aspects of castor crop cultivation, maintenance and harvesting, with an emphasis on the key success factors that will result in high yields.

Key Sections

5.1 Introduction

5.2 Castor Crop Sowing

- Soil
- Land Preparation
- Sowing

5.3 Castor Crop Growth

- Fertilizers
- Water
 - Rainfall
 - Irrigation
- Climate
- Crop Protection
 - Pests that are Harmful to Castor Plant
 - Weed Control
 - Renumerative intercropping systems with castor
 - Recommended crop sequences and rotations for castor

5.4 Castor Crop Harvest

5.5 Castor Cultivation Seasons

5.6 Hybrid Castor Seeds & Genetic Engineering of Castor Plant

- Castor Verities Recommended in India - Statewise
- Castor Verities in Gujarat
- Development of Pistillate Lines
- Development of Promising Inbred Lines and Hybrids¹
- International Germplasm Center

5.7 Yields for Castor Seeds and Castor Oil from Seed

- Castor Seed Yield
- FAO Data for castor seed yields

- Castor Oil Yield

5.9 Impact of agronomic practices on productivity of castor seeds

5.8 Castor Cultivation FAQ

Castor Seed Varieties & Hybrids

Some Short Term (annual) Varieties Tested in East Africa

Variety	Time To Maturity
I123	7-10 Months
UC53	7-10 Months
Baker 44	5-7 Months
Baker 22	5-7 Months
Lynn	5-7 Months

Advantages of annual varieties: Higher yield potential, seeds seldom shatter and have uniform hull strength and thickness.

Disadvantages of annual varieties: Pest susceptibility

The varieties of castor seeds recommended for below mentioned states of India are given in the report

States

- Andhra Pradesh
- Uttar Pradesh
- Gujarat
- Tamil Nadu
- Karnataka
- Maharashtra
- Rajasthan
- Haryana
- Punjab
- For all states
- For entire country

Renumerative Intercropping Systems with Castor

Intercropping system	Row proportion	Recommended states
Castor + Pigeon pea	1:1	Gujarat, Andhra Pradesh
Castor + Cowpea	1:2	Gujarat, Andhra Pradesh
Castor + Urd bean	1:2	Gujarat, Andhra Pradesh
Castor + Mung bean	1:2	Gujarat, Andhra Pradesh
Castor + Cluster (vegetable)	1:1	Andhra Pradesh
Castor + Groundnut	1:5 or 1:7	Andhra Pradesh, Tamilnadu, Karnataka
Castor + Groundnut (Bunch)	1:3	Gujarat
Castor + Soybean	1:1	Bihar

Castor Cultivation FAQ

- Why is castor an annual crop while it is actually a perennial?
- Is harvesting done manually or is it automated?
- Intercropping of castor with other plants?
- What are the safety laws that are followed in the castor industry – especially in areas where people come in contact with the seeds and/or castor meal?
- Is spreading castor meal as fertilizer not a problem to those who spread it?
- How resistant is the crop to salinity?
- What are the fertilizers commonly used for castor crop cultivation?
- Provide more details on castor meal as fertilizer
- Is organic castor oil produced anywhere?
- How is soil fertility maintained?
- Is there a danger to the flora and fauna in the region owing to the toxicity of castor beans?

This chapter explains in detail about castor crop cultivation and also provides yield data under different soil and climatic conditions

Chapter 6 Castor Oil End-uses

The ever-expanding end uses of castor oil and its derivatives make it imperative for businesses and companies to have an updated and comprehensive knowledge of the various applications of each castor oil derivative. This chapter provides extensive details on the current, emerging and future possible end-use applications of castor oil and its derivatives. Special emphasis is given to providing real-life and exclusive data for niche applications such as the use of castor oil to produce polyurethane, nylon 6 and nylon 11. A detailed evaluation is also provided on the suitability of castor oil as a biodiesel feedstock.

Key Sections

6.1 Current End-uses for Castor Oil and Derivatives

6.1.1 End Uses – by Castor Oil Grade / Derivative

6.1.2 Castor Oil & Castor Oil Derivatives Uses – By Industry

- Agriculture
- Food
- Textile Chemicals
- Paper
- Plastics & Rubber
- Cosmetics & Perfumeries
- Electronics & Telecommunications
- Pharmaceuticals
- Paints, Inks & Additives
- Lubricants
- Bio-fuels
- Other End Products Where Castor Oil & Derivatives are Used
 - Medicinal Uses of Castor Oil
 - Anti-cancer Drugs
 - Antifungal Drugs
 - Heart & Blood Pressure Drugs
 - Human Immunodeficiency Virus (HIV) Protease Inhibitors
 - Organ Transplant Drugs
 - Use of Castor Oil to Encourage Onset of Labour

6.1.3 Use of Castor Oil in High-end Derivatives

6.2 Future Possible End-uses and End User Industries for Castor Oil and Derivatives

6.2.1 Biopolymers and Castor oil

- Building Blocks for Polymers-based on Natural Oils
 - Biopolymers in Durables
 - Castor Oil Polyurethane
- Features of Castor Oil Based Polyurethane

- A Typical Polyurethane Formulation
 - Nylon
 - Castor Oil Derivatives for Other Plastics
 - Research & Trends in Castor Oil Based Biopolymers
- 6.2.2 Castor Oil as a Feedstock for Biodiesel
- Can castor oil become an efficient bio-fuel and bio-diesel?
 - Cost of Castor Oil
 - Evaluation Table for Castor Oil as Biodiesel Candidate
 - A comparative study of physical properties of castor oil biodiesel and its blends with conventional fuel
 - Preliminary Inference for “Can Castor Oil Make a Good Biodiesel?”
 - Some useful research info on biodiesel from castor oil
- 6.2.3 Other Possible Future Uses

Current End Uses for Castor Oil & Derivatives

12-HSA

12 HSA is used in grease manufacture, plastics lubrication and as a raw material for the synthesis of more complex chemicals. It is used as a high hydroxyl castor based wax, as a wax ingredient.

When reacted with an ester, 12 HSA provides a hard finish for the automotive and small appliance industries.

Both HCO and 12 HSA have enjoyed popularity with the growth of lithium complex greases, which are growing to be the largest segment of the grease market. These greases have excellent heat tolerance like the sodium greases and the water resistance of calcium greases. The addition of 12 HSA enhances the overall performance with better texture, improved heat stability and improved dropping points. It simplifies the grease manufacturing process because it no longer requires milling and homogenization steps that were normally used with lithium type greases.

12 HSA soaps are used in mineral oil-based multipurpose greases making it possible for grease to fill the requirements of a variety of needs in the automotive and truck greases.

In cosmetics: 12 HSA may be used for gelling liquid petroleum to produce brilliance. It may be incorporated into cold creams and vanishing creams to give a jelly-like feeling.

In paints: 12-HSA is reacted with acrylic esters to produce hard, durable thermosetting polymers used in high-quality automotive, industrial appliance and metal decorative finishes.

In rubbers: 12-HSA functions as an activator and internal lubricant for natural and synthetic rubbers.

Nylon 11

The process to make Nylon 11 from castor oil is quite involved and includes several reaction steps, but briefly, it is as follows:

Castor oil is converted to methyl ricinoleate by treatment with methyl alcohol. Methyl ricinoleate is pyrolysed at high temperature yielding heptaldehyde, methyl undecylenate and a small amount of fatty acids. Methyl undecylenate is hydrolysed to produce undecylenic acid. When undecylenic acid is treated with hydrogen bromide in a non-polar solvent in the presence of peroxide, reverse Markownikoff addition occurs and the main product is x-bromoundecanoic acid. This is then treated with ammonia to give x-aminoundecanoic acid, which is a crystalline solid. Aminoundecanoic acid is the starting material for nylon-11.

Castor Oil Use in Cosmetics & Perfumeries

<i>End Products</i>	<i>Castor Products & Derivatives Used</i>
<ul style="list-style-type: none"> a. Perfumery Products b. Lipsticks c. Hair Tonics d. Shampoos e. Polishes f. Emulsifiers g. Deodorants 	<ul style="list-style-type: none"> a. Castor Oil b. Castor Oil Esters c. Undecylenic Acid d. Castor Wax e. Zinc Ricinoleate f. Heptaldehyde g. Heptanoic Acid h. Undecylenic Acid i. Heptyl Alcohol j. Ethyl Heptoate k. Heptyl Acetate

A comparative study of physical properties of castor oil biodiesel and its blends with conventional fuel

Properties	Units	Petroleum Diesel	B10	B20	B100
Specific Gravity		0.8610	0.8643	0.8703	0.9268
Density	Kg/m ³	861.0	864.3	870.3	926.8
Kinematic viscosity	mm ² /sec	3.81	4.54	4.97	15.98
Flash Point	°C	68.3	85.3	88.7	190.7
Heating value	kJ/kg	47216.4	44427.6	44780.4	37900.8
Copper strip corrosion		1a	1a	1a	1b
Carbon residue	Mass (%)	0	0.009	0.007	0.039
Cloud point	°C		-5	-7	-23
Pour point	°C	-6	-26	-30	-45

Source: <http://www.icrepq.com/full-paper-icrep/222-barajas.pdf>

Global Companies Associated with Castor Oil Based Nylon Production

Company	Grades
Arkema	11 (homopolymer)
BASF	6, 10
DuPont	6, 10: 10, 10
DSM	4, 10
EMS	6, 10 10, 10 '10T' (PPA)
(PPA)	6, 10 10, 10
Evonik	6, 10

The scope of applications and potential markets for castor oil and its derivatives are explained in this chapter. Profiles of end users of castor oil derivatives are given. In addition, this chapter also analyzes castor oil's suitability as a replacement for biodiesel.

Chapter 7 Castor Seeds

A number of research efforts have been initiated towards development of hybrid and high-yield castor seeds. These efforts will be crucial in expanding the crop cultivation worldwide. This chapter provides key inputs related to castor seeds, and has a special emphasis on providing critical data that will be of special interest to those keen on exploring investing in this industry – data related to prices, and inputs on castor seed varieties including trends in hybrid castor seeds.

Key Sections

- 7.1 Introduction to Castor Seeds
- 7.2 Castor Seeds Production & Supplies
- 7.3 Castor Seeds Prices & Trends
- 7.4 Castor Seeds Packaging & Storing
- 7.5 Castor Seed Varieties
- 7.6 Castor Seed Factoids

Castor Seed Prices & Trends

The average spot prices provided for specific months over a 3 year period to demonstrate the increase and volatility in prices

Year	Average Price (\$ / T)	Year	Average Price (\$ / T)
2005 May	400	2009 Mar	490
2005 Nov	330	2009 Jul	540
2006 Mar	340	2009 Nov	640
2006 Jul	340	2010 Mar	640
2006 Nov	400	2010 Oct	812
2007 Mar	460		
2007 Jul	480		
2007 Nov	500		
2008 Jan	510		
2008 Mar	600		
2008 Jul	700		
2008 Nov	650		

Apart from price details, this chapter also talks about castor seed production and supplies in major countries for the past ten years.

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Chapter 8 Castor Meal

Castor meal makes an excellent bio-fertilizer owing to its optimal composition of nutrients (especially N-P-K). The toxicity in castor meal makes it unsuitable for use as animal feed, thus resulting in a lower price for the meal while compared with prices of competing oilseed-meals such as soymeal or rapeseed meal. This combination of high fertilizer value and a low price has resulted in an ever increasing demand for castor meal from the organic fertilizer market worldwide. This chapter provides details on composition, supply/demand, price data and related commercials for castor meal.

Key Sections

- 8.1 Castor Meal Uses
- 8.2 Castor Meal Composition
- 8.3 Castor Meal Supply & Demand
- 8.4 Toxicity in Castor Meal
- 8.5 Energy Content in Castor Meal
- 8.6 Castor Meal – Other Points

Toxicity in Castor Meal

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The castor cake is mainly used as a fertilizer. It is unsuitable as an animal feed because of the presence of toxic protein called ricin and toxic allergen often referred to as CBA (castor bean allergen). However, it is noteworthy that none of the toxic components is carried into the oil.

Some methods for the detoxification of the cake have been attempted. These include

- Treatment with ammonia, caustic soda, lime and heat.
- When the cake is steamed, the ricin is detoxified and the allergen is inactivated.
- Another method of detoxifying castor seed meal involved the wet mixing with sal seed meal so that the toxic constituents of castor seed were neutralized by tannins.
- Detoxified and deallergized castor meal (DDCM) is a by-product of an extraction process of the castor bean in Thailand, introduced in the 1990s. It has been claimed that DDCM can be safely used as animal feed. It is claimed that the extraction process is done in such a way that due to the action of heat, together with some base solubles, the castor meal is rendered non-toxic.

Benefits of castor cake as a soil fertilizer

- Increasing yield
- Improving soil pH index
- Increasing cane yield and sucrose content in juice
- Increasing N content in grain and straw
- Controlling nematodes
- Increasing tuber yield

Plants best fertilized by castor de-oiled cake:

Maize, Sugarcane, Rice, Banana, Jute, Tomato, Wheat/Barley, Potato and Tobacco.

In addition, some people in parts of South-Eastern Nigeria have long developed a method for treating and detoxifying the unextracted seed. In this case, the method used to detoxify castor seed involves fermentation. The seeds are first dehulled and boiled in water for about 18 hours. The boiled seeds are cooled and wrapped together with leaves and allowed to ferment in the fire place for about five days. The fermented seeds are then mashed by pounding using a mortar and pestle. This is followed by addition of ash from burnt palm kernel husk which gives it a dark colour. The dark, mashed product is allowed to mature for a further period of five days after which it is packaged for sale. It is believed that most of the detoxification takes place during fermentation and it leads to the elimination of the toxic factors. Microbiological studies have shown that the bacteria involved are spore-forming bacteria, especially members of the genus *Bacillus*

Detailed inputs on castor meal composition, its uses and demand-supply information are provided in this chapter.

Chapter 9 Castor Oil Distribution & Logistics

Castor oil is transported for long distances – sometimes tens of thousands of kilometers - from the place of production to the place of consumption. This transportation also takes different forms, the primary means being by road and by ship transportation. The extensive logistics required in the castor oil business implies that producers and consumers of castor oil and derivatives have in-depth knowledge of the key aspects in castor oil storage, transportation and logistics. This chapter provides these inputs.

Key Sections

9.1 Castor Oil Storing & Packaging

9.1.1 Castor Oil Storage

9.1.2 Castor Oil Packaging

9.1.3 Castor Oil Shelf Life

9.2 Castor Oil Transportation & Logistics

9.2.1 Distribution from Farms to Refinery

9.2.2 Transport

9.2.3 Cargo Handling

9.2.4 Density & Volume Expansion

9.2.5 Cargo Securing

9.2.6 Risk Factors & Loss Prevention

- Temperature
- Humidity/Moisture
- Ventilation
- Biotic Activity
- Self-heating / Spontaneous Combustion
- Odour
- Contamination
- Mechanical Influences
- Toxicity / Hazards to Health
- Shrinkage / Shortage
- Insect Infestation / Diseases
- Castor Oil Storage during Transportation

Risk Factors & Loss Prevention**Contamination**

Active behavior	<p>Leaking oil leads to massive contamination and may make whole cargoes unusable.</p> <p>Of considerable significance with regard to tank cleaning is the iodine value, which is a measure of how strong a tendency the oil has to oxidation and thus to drying. Drying is particularly detrimental to tank cleaning, as the oil/fat sticks to the walls and can be removed only with difficulty. On the basis of drying capacity, oils are divided into nondrying, semidrying and drying oils.</p> <p>With an iodine value of 81 - 100, castor oil is a non-drying oil, which means that it does not dry significantly on contact with atmospheric oxygen and so the tanks are easily cleaned.</p>
Passive behavior	<p>Castor oil is sensitive to contamination by ferrous and rust particles and water (especially seawater).</p> <p>The tanks or barrels must be clean and in a thoroughly hygienic condition before filling.</p>

More such risk factors and prevention methods are discussed in this chapter

Chapter 10 Prominent Castor Oil Producers

India is by far the largest producer and exporter of castor oil, followed by China and Brazil. However, many other countries – especially from South East Asia, Africa and South America - are showing significant interest in being large-scale producers of castor crop, castor oil and castor chemicals in future. This chapter provides profiles and details of the key companies involved in the castor oil industry, with a special focus on the leading Indian castor oil and castor oil derivative producers.

- 10.1 Producers in India
- 10.2 Producers in China
- 10.3 Producers in Brazil
- 10.4 Other Suppliers

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RPK Agrotech

Main Line of Business: Castor oil and derivatives producer and trader

Background: RPK Agrotech was established in 2004 and focuses on castor oil exports.

Products: The Company focused on producing the basic castor oil grades. The company has also started trading of castor oil derivatives mainly HCO and 12 HSA, which the company gets made on job work basis. The company has a capacity to crush over 9000 MT of castor seed per month. It is currently (Dec 2008) setting up new plant with crushing capacity of castor seed with 250 MT per day.

For a complete list of products, please see the following URL –

<http://rpkagrotech.com/products.php>

Financials: Approximately \$25 million

Location: The Company operates a manufacturing facility at KSEZ Kandla in the state of Gujarat. The other unit is at Bhachau, also in Gujarat.

Address:

Plot No 351, 2nd Floor,
Sector 1/A, Gandhidham,
Gujarat - 370201

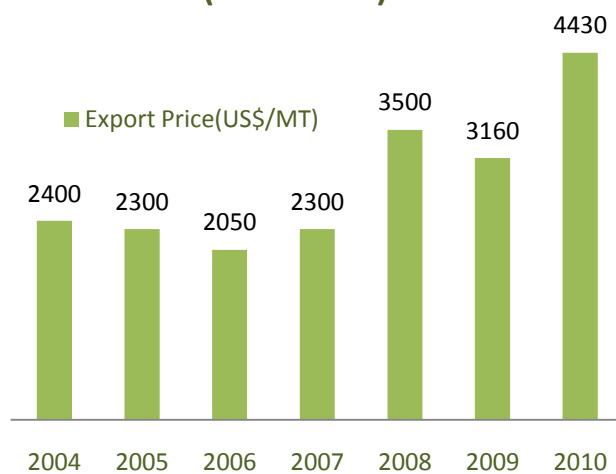
www.rpkagrotech.com

Detailed profiles are provided for over 10 prominent companies from India, China and Brazil that have ventured into the castor oil industry.

Appendix 1

SAMPLE TOPIC

Chinese Export Price of Sebacic Acid (2004-2010)



Source: From the Global Castor Conference, 2011.

Appendix 2

Nation wise export data for castor oil derivative-Undecylenic acid

S.No	Country	Values in Rs. Lakhs			
		Year			Growth (%)
		2008-09	2009-10	2010-11	
1	Argentina	6.06	4.96	15.38	209.96
2	Australia	2.72	NA	NA	NA
3	Belgium	33.40	NA	1.38	100.0
4	Brazil	279.21	373.22	0.84	-99.77
5	Chile	NA	NA	NA	NA
6	China PR	21.18	5.22	48.86	836.95
7	Columbia	53.90	25.11	20.06	-20.13
8	Czech Republic	0.41	0.15	NA	-100.0
9	Equador		52.68	104.66	98.66
10	France	1.68	NA	0.23	100.0
11	Germany	185.83	215.87	169.13	-21.65
12	Indonesia	6.64	2.97	NA	-100.0
13	Japan	NA	42.70	219.45	413.97
14	PR Korea	NA	NA	1.34	100
15	Mexico	15.26	47.78	NA	-100.0
16	Netherland	134.83	35.48	28.81	-18.80
17	New Zealand	2.25	9.04	4.68	-48.30
18	Peru	33.15	NA	60.96	100.0

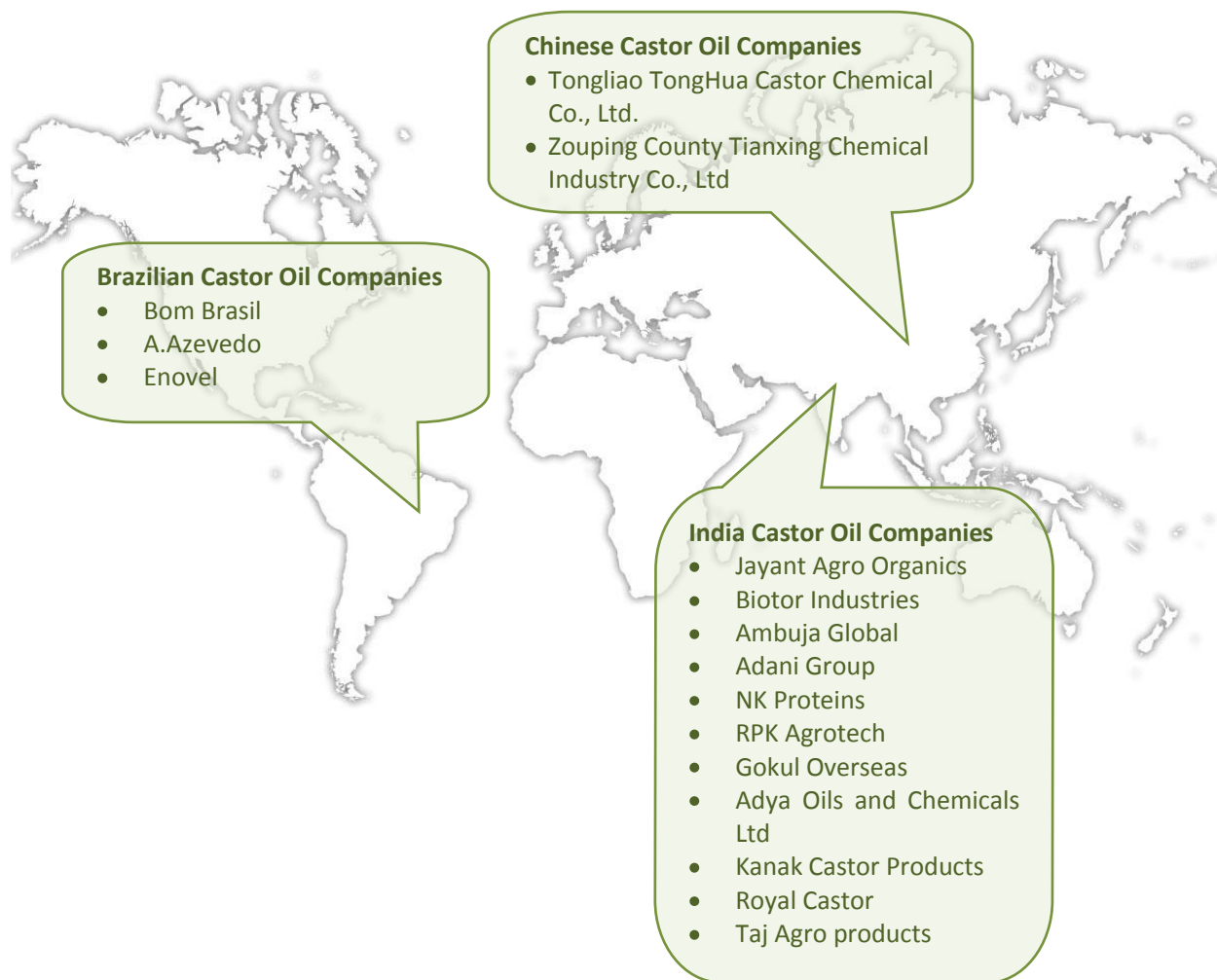
Source: Ministry of Commerce, Government of India

Prominent Castor Oil Players

India Castor Oil Companies

Chinese Castor Oil Companies

Brazilian Castor Oil Companies



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