

Monsoon and Sowing: Update

As South-West monsoon picked up pace, resulting in cumulative rainfall of 8% above LPA as of 12 Aug 2022. The actual rainfall (weekly distribution) for this period is also higher than the past year levels. However, Eastern region continues to receive deficient rainfall. The impact of scanty rainfall is already been visible in the lower sowing area. Acreage of pulses and oilseeds have declined. Rice sowing is expected to be hit further. Out of 36 subdivisions, 6 have received deficient rainfall during this period and 6 states are in the deficient zone. On storage levels, the southern states have recorded highest storage levels compared with other regions. The higher storage levels bodes well for rabi sowing.

Where does Kharif sowing stand?

As of 12th Aug 2022, sown area of pulses (4%) and oilseeds (0.8%) has declined compared with last year. Within pulses, significant drop in sown area has been registered in Arhar (11.7%) and Urad (4.6%). Area sown for Jute and Mesta has also declined by 1%. Total sown area of rice had also registered a dip in the previous week. On the other hand, acreage of cotton and sugarcane had improved by 5.3% and 0.2% respectively.

Table 1: Kharif Sowing

	Area sown in 2022-23 (mn ha)	Area sown in 2021-22 (mn ha)	Growth (YoY %)
Cereals	37.4	40.2	(7.1)
Rice	23.2	26.7	(13.3)
Pulses*	12.2	12.7	(4.0)
Oilseeds*	18.0	18.2	(0.8)
Cotton	11.8	11.2	5.3
Sugarcane	5.5	5.4	0.2
Jute and Mesta	0.7	0.7	(1.0)

Source: CEIC, Bank of Baroda | *Data as of 12 Aug 2022. For cereals, rice, cotton and Sugarcane-5 Aug 2022. For others, data as of 29 Jul 2022

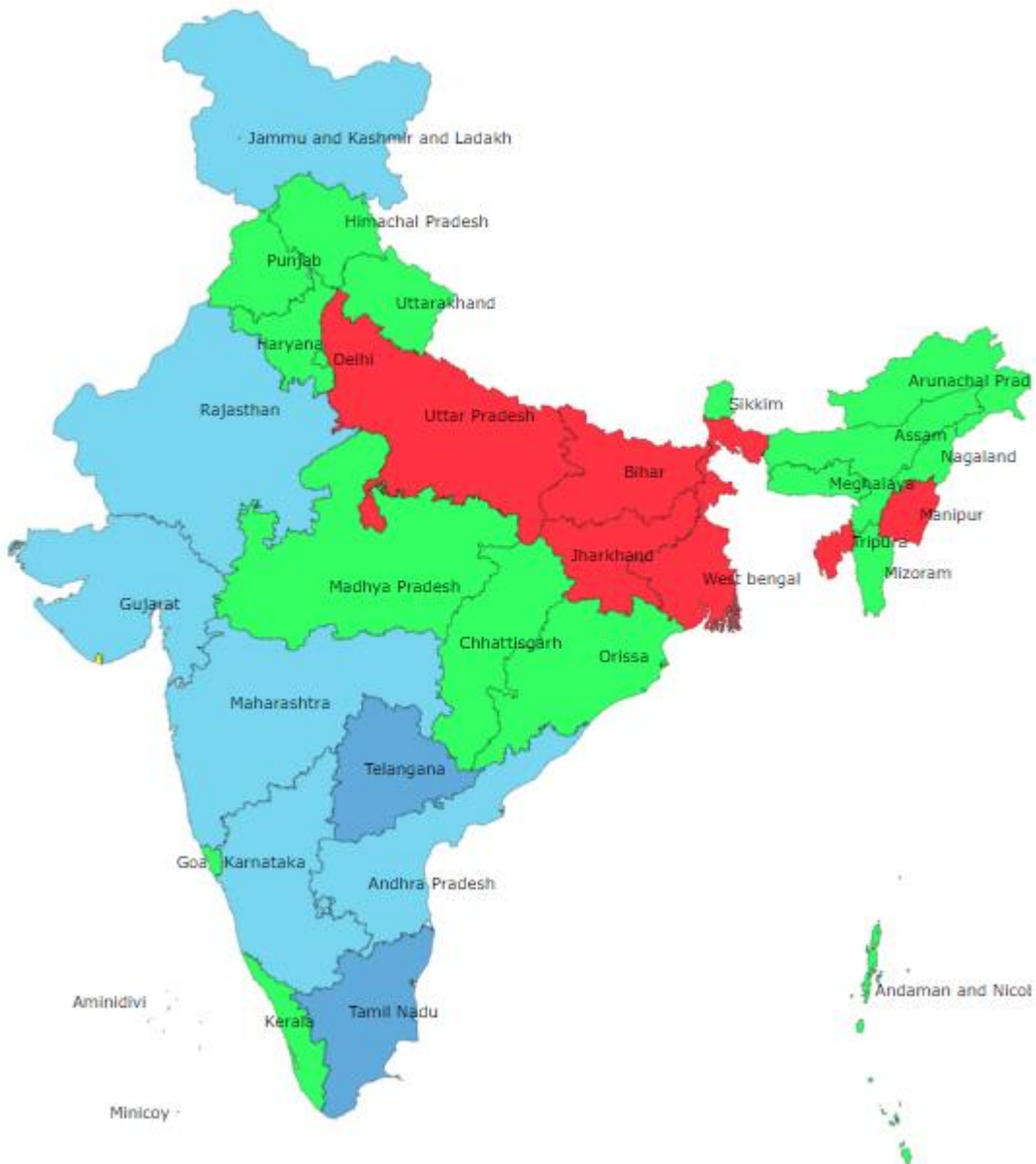
Monsoon:

For the period 1 Jun 2022 to 12 Aug 2022, South West Monsoon is 8% above LPA compared with last year.

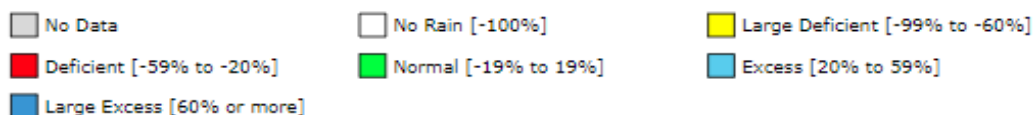
- For Fig 1, states in the Eastern Region such as Uttar Pradesh, Bihar, Jharkhand, West Bengal and Manipur continue to receive much lower rainfall. Delhi too has been receiving end of the deficient rains.
- On the other hand, Western region including states such as Rajasthan, Gujarat and Maharashtra is witnessing excess rainfall. States in the Southern region have also received heavy rainfall, during this period.
- IMD in its forecast stated there are active monsoon conditions forming in the Central part of India in the coming days.

- However, IMD expects subdued rainfall in the Eastern region including Uttar Pradesh, Bihar and North Eastern states.
- The Climate Prediction Centre in its monthly forecast stated La Nina conditions are likely to continue, though the chances of La Nina has dipped from 86% to 60% for Dec-Feb'23.

Fig 1: Distribution pattern of South-West Monsoon



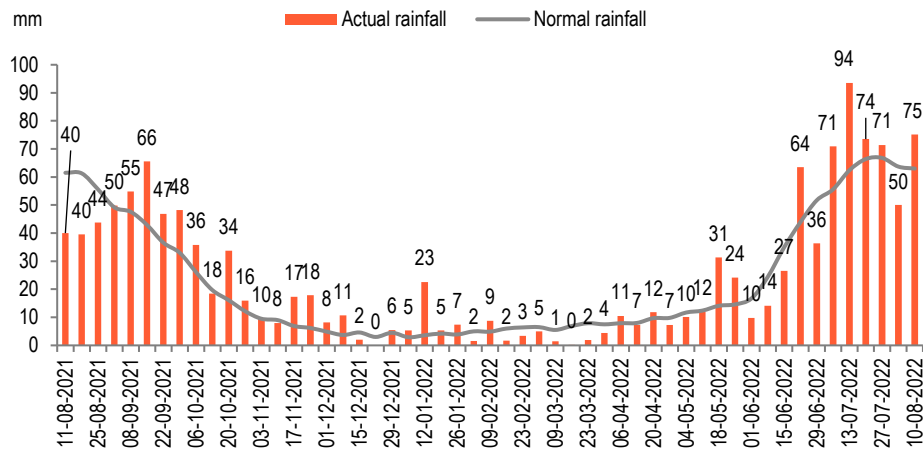
Source: IMD, Bank of Baroda Research | Period from 1 Jun-12 Aug 2022.



In Fig 2, actual rainfall this year has been comparatively more than last year (75mm versus 40mm). It is also higher than the normal rainfall which currently stands at 63mm. Fig 3, explains regions wise distribution of rainfall. East and North Eastern region continue to witness lower rainfall (-16% of LPA),

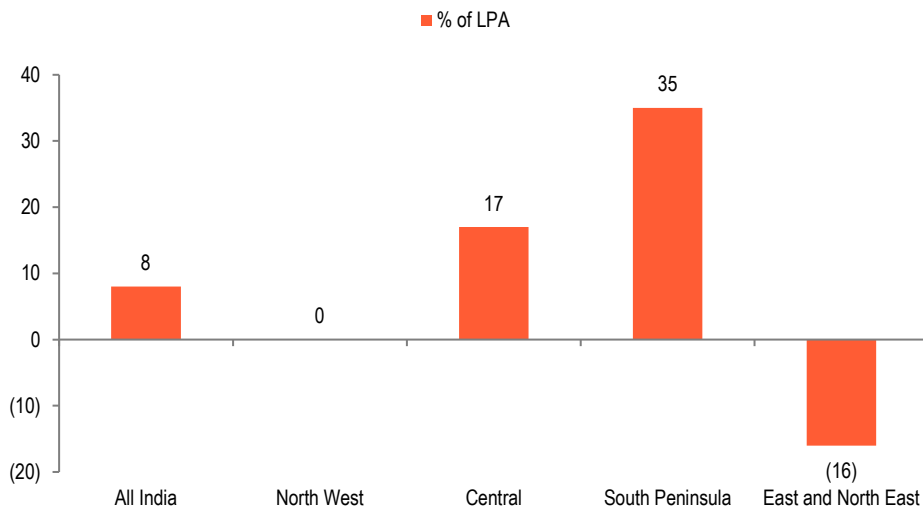
while other regions are in green with Southern Peninsula (35% of LPA) and Central region (17% above LPA) receiving heavy rainfall.

Fig 2: Weekly distribution of rainfall



Source: CEIC, Bank of Baroda

Fig 3: Region-wise deviation of rainfall



Source: CEIC, Bank of Baroda

In the table 2, mentioned below, over 6 subdivisions have received deficient rainfall (-20% to -59% of LPA) for cumulative period ranging from 1 Jun-12 Aug'22. Amongst states too, there are over 6 states that have received deficient rainfall during this period.

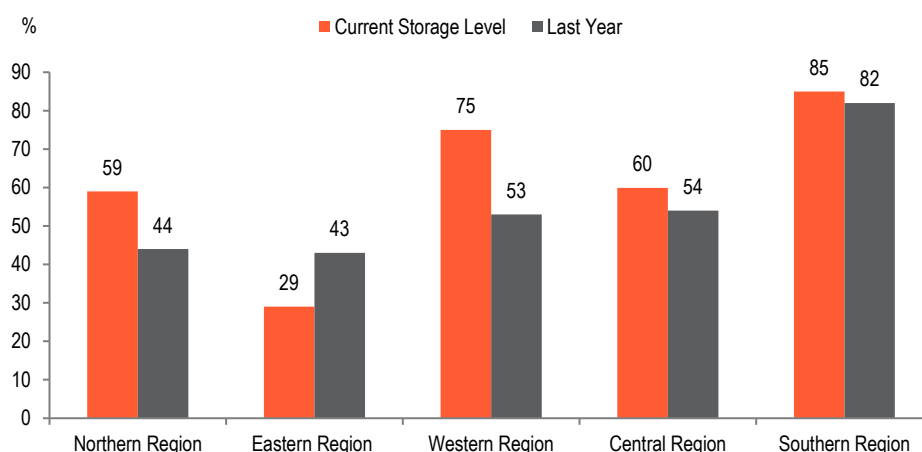
In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 67% as of 11 Aug 2022. Amongst regions, Southern region continues to have highest reservoir level (85% against 82% last year), followed by Western (75% versus 53% last year), Central (60% against 54%), Northern (59% against 44%) and Eastern region (29% versus 43% last year).

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2022-12 Aug 2022)	No. of Subdivisions	Subdivisional % area of Country
Large Excess	4	16%
Excess	10	31%
Normal	16	36%
Deficient	6	17%
Large Deficient	0	0%
No Rain	0	0%

Source: IMD, Bank of Baroda

Fig 4: Region-wise deviation of rainfall



Source: Central Water Commission, Bank of Baroda

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