25th August 2022

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Monsoon and Sowing: Update

For the cumulative period, South West Monsoon is 9% above LPA as of 24 Aug 2022. Out of 36 subdivisions, 6 are in the deficient zone during this period along with 7 states (Uttar Pradesh, Bihar, and Jharkhand amongst others). Moreover, West Bengal has begun to receive normal rains and is a positive sign amidst dip in sowing activity. However, a large part of sowing has already been completed and hence needs to be monitored. Overall sown area of Kharif crops continues to lag and has declined by 2.5% compared to last year. Sown area of rice (8.3%) and pulses (5.3%) is much lower, in comparison with last year and needs to be watched.

Where does Kharif sowing stand?

For the week ended 19th Aug 2022, overall kharif sown area has fallen by 2.5% compared with last year. Sown area of rice and pulses have declined by 8.3% and 5.3% respectively. Within pulses, Arhar (7.2%), Urad (5.1%) and Moong (4.6%) have registered a significant drop in acreage. Area sown for oilseeds too (0.9%) continues to remain low compared with last year levels. On the other hand, sowing area of cotton (6.7%) and sugarcane (1.5%) have registered an improvement.

Table 1: Kharif Sowing

	Area sown in 2022-23 (mn ha)	Area sown in 2021-22 (mn ha)	Growth (YoY %)
Foodgrains	64.2	67.5	(4.8)
Cereals	51.6	54.2	(4.7)
Rice	34.4	37.5	(8.3)
Pulses	12.6	13.3	(5.3)
Oilseeds	18.4	18.6	(0.9)
Cotton	12.4	11.7	6.7
Sugarcane	5.5	5.5	1.5
Jute and Mesta	0.7	0.7	0
Total	101.3	103.9	(2.5)

Source: CEIC, Bank of Baroda | *Data as of 19 Aug 2022.

Monsoon:

For the period 1 Jun 2022 to 23 Aug 2022, South West Monsoon is 9% above LPA compared with last year.

- For Fig 1, Eastern belt of the country with states like Uttar Pradesh, Bihar, Jharkhand, and Delhi continue to lag in terms of much lower rains in these regions. Nagaland and Manipur too are in the deficient zone.
- On the other hand, Western and Central Region including Rajasthan, Maharashtra, Madhya Pradesh, Gujarat and Karnataka have received excess rainfall. Tamil Nadu too has been witnessing heavy rainfall.

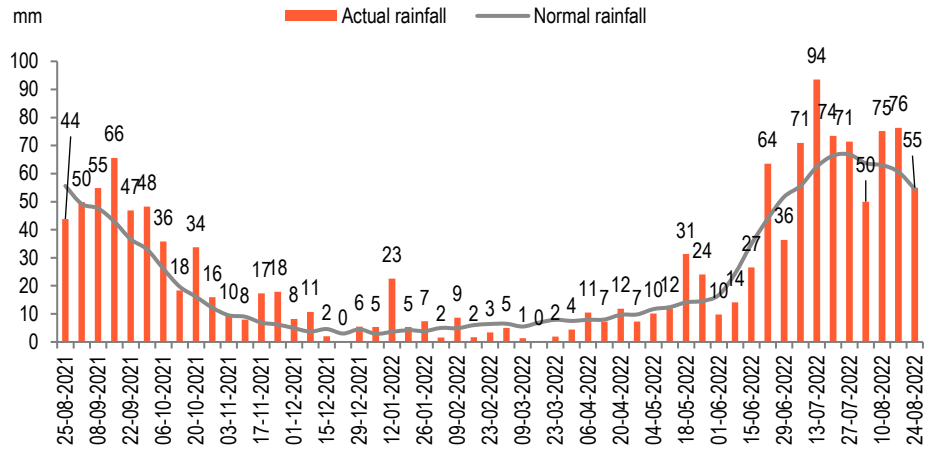
- Some States have received normal rainfall such as Odisha, Chhattisgarh, Andhra Pradesh and Kerala. Additionally, states in the Northern region such as Jammu and Kashmir, Punjab, Himachal Pradesh and Haryana have also received normal rains. Notably, after being in deficient zone for a long time, West Bengal has begun receiving normal rains.
- IMD has projected in the coming week, scattered to widespread rainfall throughout the country with the exception of states such as Maharashtra, Gujarat, Jammu and Kashmir and Rajasthan.

Fig 1: Distribution pattern of South-West Monsoon

Source: IMD, Bank of Baroda Research | Period from 1 Jun-24 Aug 2022.

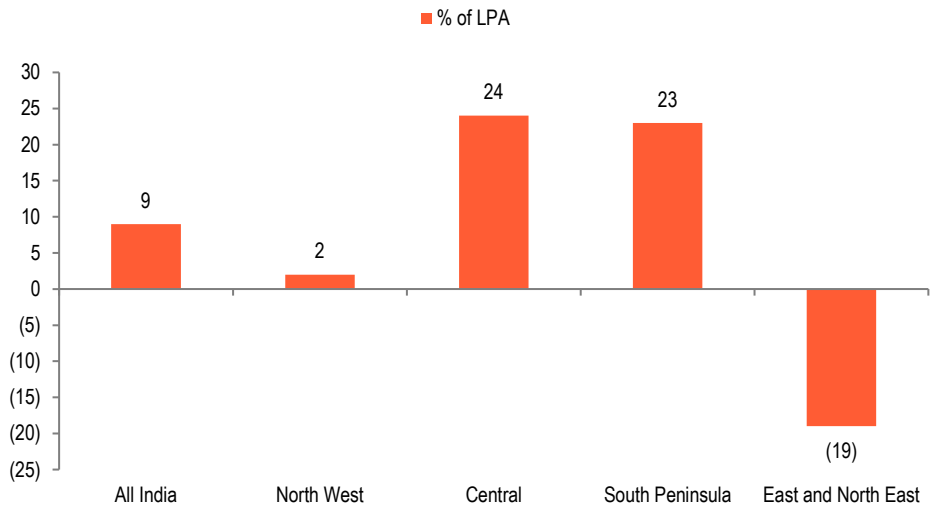
In Fig 2, actual rainfall this year has been comparatively more than last year (55mm versus 44mm). It is also marginally higher than the normal rainfall which currently stands at 54mm. Fig 3, explains regions wise distribution of rainfall. East and North Eastern region continue to lag behind other regions resulting in deficient rainfall (-19% of LPA), while other regions remain in green with Southern Peninsula (23% of LPA) and Central region (24% above LPA) receiving heavy rainfall. North West region is also back in green with rainfall 2% above LPA.

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-24 Aug'22. Amongst states, there are over 7 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 76% as of 18 Aug 2022. Amongst regions, Southern region continues to have highest reservoir level (87% against 81% last

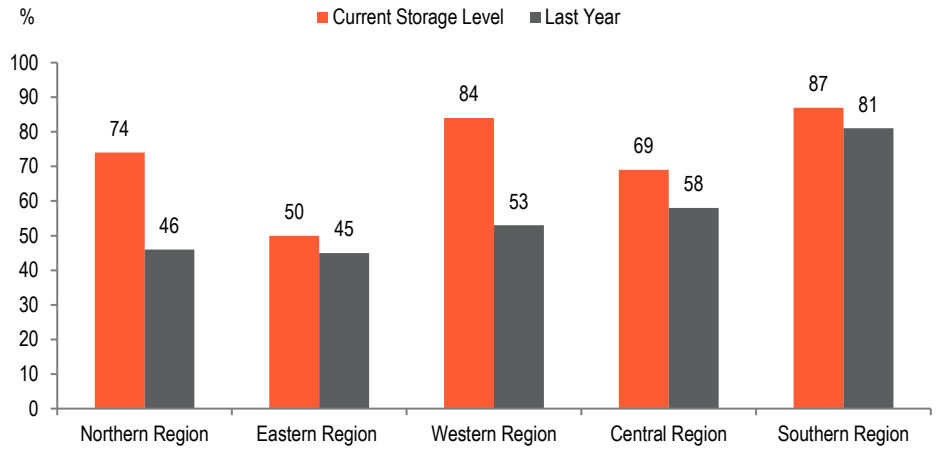
year), followed by Western (84% versus 53% last year), Central (69% against 58%), Northern (74% against 46%) and Eastern region (50% versus 45% last year).

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2022-24 Aug 2022)	No. of Subdivisions	Subdivisional % area of Country
Large Excess	2	10%
Excess	12	35%
Normal	16	38%
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

In terms of districts (Table 3) receiving deficient and largely deficient rainfall, there are over 143 districts that have on cumulative basis been in the deficient zone (-20% to -59% of LPA) due to patchy rainfall. However, there are only 24 districts that are in largely deficient range receiving rainfall in the range of -60% to -99% of LPA. The number of districts has dropped from 33 last week to 24.

Table3: Districts in the large Deficient zone

Name of Districts		
LAKHISARAI	SANTKABIRNAGAR	PAKUR
SHEIKHPURA	SAHEBGANJ	KUSHINAGAR
BALLIA	BAGHPAT	GAUTAMBUDHNAGAR
GONDA	SHAHJAHANPUR	GHAZIABAD
MAHARAJGANJ	GODDA	FARRUKHABAD
LAHUL AND SPITI	CHANDAULI	BHAGALPUR
JAMTARA	MAU	JAUNPUR
SHRAWASTI	RAMPUR	KANPURDEHAT

Source: IMD, Bank of Baroda I Note: Districts receiving rainfall in the range of -60% to -99% of LPA has been taken

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