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Monsoon and Sowing: Update

The advancement of South West monsoon (way earlier than anticipated) across the country has resulted in above normal rainfall at 2% above LPA till 8 Jul 2024. This has resulted in overall improvement in sown area, with higher acreage of both paddy and pulses compared with last year. The actual rainfall for this period has exceeded and moved past the normal range. Out of 36, 21 subdivisions have received normal rainfall during this period and 7 states are in the deficient zone. Regionwise, Central and North Eastern regions have recorded lower rainfall. A major portion of sowing occurs during the July and August period. Coming weeks remain crucial in terms of distribution of rainfall and impact of the same will be reflected on kharif sowing.

Where does Kharif sowing stand?

As of 5th Jul 2024, overall sown area has improved by 14% compared with last year. Total sown area of rice (19.4%) and oilseeds (54.7%) has risen. Amongst coarse cereals, the sowing area of crops such as Bajra and Jowar has dropped the most. However, higher acreage has been registered for pulses (19.4%), and sugarcane (2.6%) for the same period. Within pulses, sown area of Arhar and Urad has increased the most. Notably, sown area for cotton and jute and Mesta crops has fallen.

Table 1: Kharif Sowing

	Area sown in 2024-25 (Lakh ha)	Area sown in 2023-24 (lakh ha)	Growth (YoY %)
Coarse Cereals	54.5	82.1	(33.6)
Paddy	36.8	23.8	19.4
Pulses	36.8	23.8	54.8
Oilseeds	80.3	51.9	54.7
Cotton	80.6	62.3	(29)
Sugarcane	56.8	55.4	2.6
Jute and Mesta	5.6	6.0	(6.5)
All Crops	378.7	331.9	14.1

Source: CEIC, Bank of Baroda | Data as of 5 Jul 2024

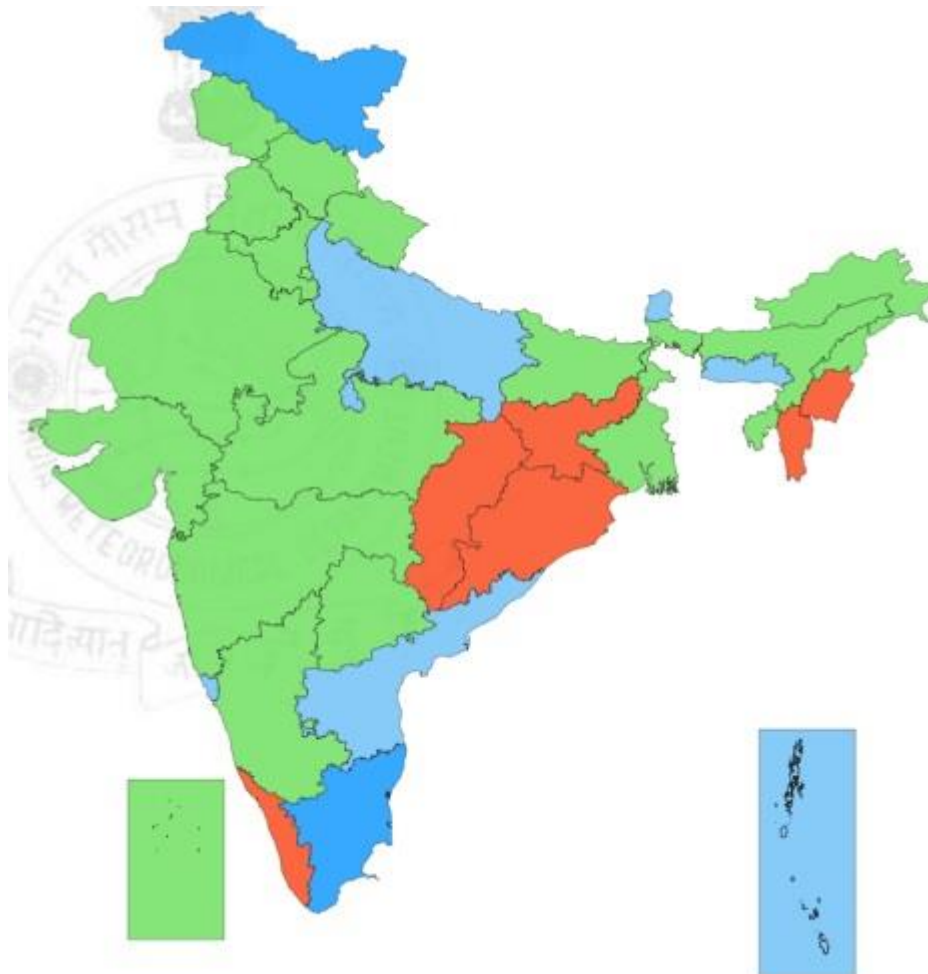
Monsoon:

For the period 1 Jun 2024 to 8 Jul 2024, South West Monsoon is 2% above LPA compared with last year.

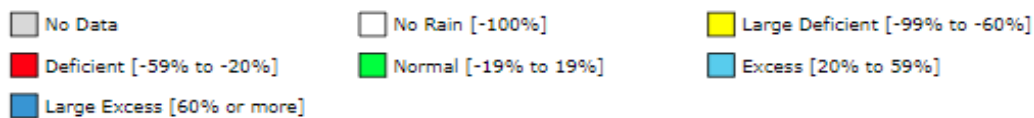
- Western and Central region of India including states such as Rajasthan, Gujarat, Maharashtra, Madhya Pradesh have received normal rainfall. Other states such as Karnataka, Telangana and parts of North East region have also recorded normal rainfall during the same period.
- Eastern region of the country including states such as Jharkhand, Chhattisgarh and Odisha have witnessed deficient rainfall.

- On the other hand, states such as Tamil Nadu, Andhra Pradesh, Uttar Pradesh and Ladakh have received excess rainfall.

Fig 1: Distribution pattern of South-West Monsoon

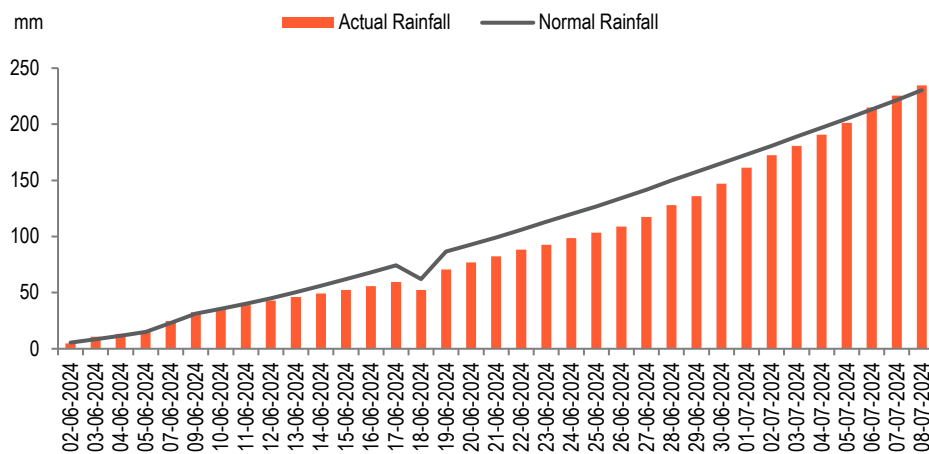


Source: IMD, Bank of Baroda Research | Period from 1 Jun-8 Jul 2024.



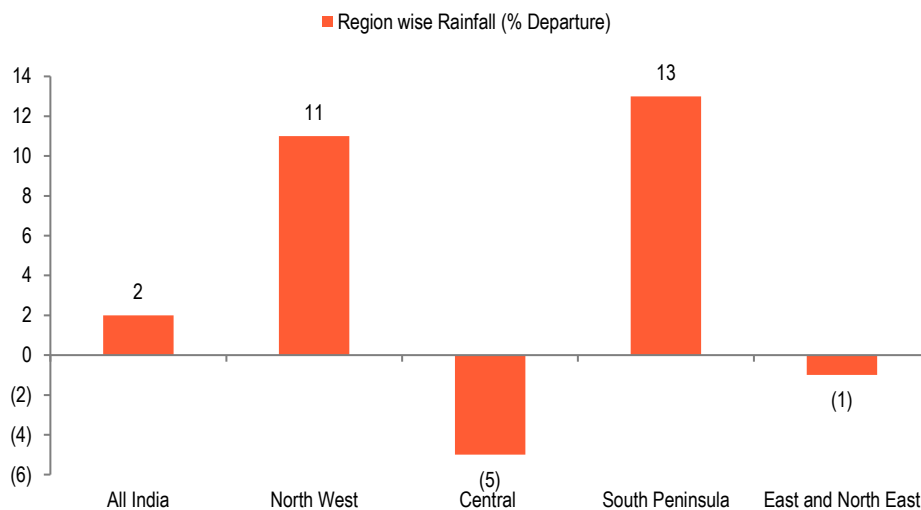
In Fig2, cumulative actual rainfall this year has been comparatively less than last year (234.6mm versus 227.9mm). It is much higher than the normal rainfall. Fig 3, explains regions wise distribution of rainfall. With the exception of Central (5% below LPA) and East and North East region (1% below LPA), other regions such as South Peninsula (13% above LPA) and North West region (11% above LPA), have been witnessing heavy rainfall.

Fig 2: Cumulative 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 21 subdivision have received normal rainfall for cumulative period ranging from 1 Jun-8 Jul'24 and over 5 subdivisions have received deficient rainfall. Amongst states too, there are over 7 states that have received deficient rainfall during this period.

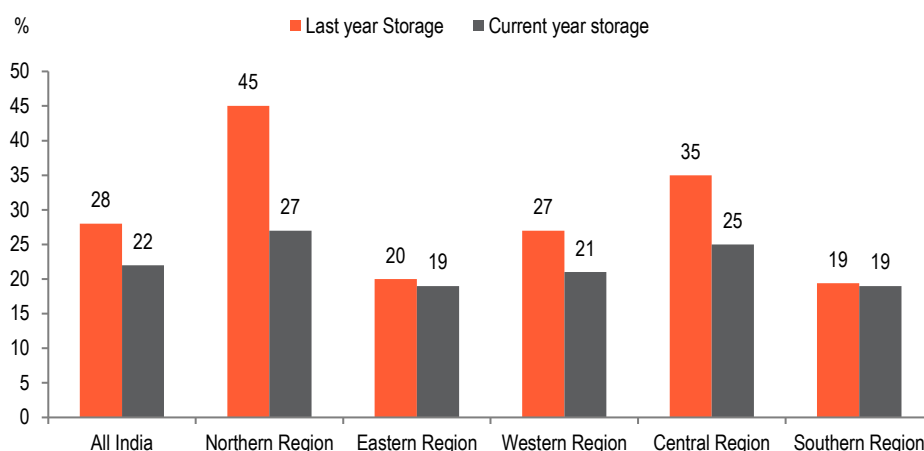
In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 22% as on 4 Jul 2024. Reservoir levels are much lower this year when compared with last year, across all the regions, with the exception of Southern region. Amongst regions, Northern region has the highest reservoir level (27% against 45% last year), followed by Central (25% versus 35% last year), Western (21% versus 27% last year), Eastern region (19% against 20%).

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2024-8 Jul 2024)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	3	7%
Excess	7	20%
Normal	21	58%
Deficient	5	15%
Large Deficient	0	0%
No Rain	0	0%

Source: IMD, Bank of Baroda

Fig 4: Reservoir level across regions



Source: Central Water Commission, Bank of Baroda

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