

3 Sep 2024

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Monsoon and Sowing: Update

Rainfall is currently 8% above the LPA till 2 Sep 2024. Momentum remains stable, with cumulative rainfall at 66.6mm between 27 Aug and 2 Sep 2024, compared with 70.1mm between 20 and 26 Aug. Between 1 Jun and 2 Sep 2024, out of 36 sub-divisions, 31 (85% of the country) have received normal or above normal rainfall so far and 8 states are in the deficient zone. Region-wise, except East & North East (-13%) which continues to report deficient rainfall, all others have received higher than normal rainfall so far. Southern peninsula (+25%) and Central region (+17%) continue to record excess rainfall. Supported by higher than normal rainfall, there has been continued improvement in the sown area (+1.9% YoY), with acreage of, paddy, oilseeds, sugarcane and coarse cereals exceeding its normal sown area. Latest data shows, that when compared with normal area of last year, this year ~99% of sowing has been completed so far. As sowing is almost complete, harvesting of crops will be critical. Excess/large excess of rainfall or deficient rainfall can be damaging for sown crops.

Where does Kharif sowing stand?

As of 2 Sep 2024, overall sown area has improved by another 1.9% compared with last year.

- With the exception of Jute and cotton, total sown area of other crops continues to increase. Once again, most notable jump is visible in pulses (7.3%), coarse cereals (3.7%) and paddy (3.8%).
- Within pulses, except Urdbean, rise in acreage was recorded for all others.
- Sown area for Arhar (12.4%), Moong bean (12.6%) and Moth bean (12%), rose in double digits.
- Acreage of Kulthi was up by 7.1% and that of other pulses by 5.3%.
- Within Coarse Cereals, sown area of only Bajra fell (-1.8%) further, while that of Ragi rose significantly. Sown area for other crops such as Maize, Jowar, and small millets also inched up.
- Oilseeds have also registered 1% increase in sown area. Within this, sown area of Soybean, Groundnut and Sunflower inched further up.
- That of Sesamum, Niger, and Castor continues to decline.
- Sown area of Jute & Mesta was down by (-) 13.1% and that of Cotton fell by (-) 9.2% compared with last year.
- This data shows that compared with normal sown area of last year, ~99% of the sowing has been completed so far.

Table 1: Kharif Sowing

(Lakh ha)	Normal Sown Area (2018-19 – 2022-23)	Area sown in 2023-24	Area sown in 2024-25	Growth (YoY %)
Coarse Cereals	180.9	181.1	187.7	3.7
Paddy	401.6	393.6	408.7	3.8
Pulses	136.0	116.7	125.1	7.3
Oilseeds	190.2	188.8	190.6	1.0
Cotton	129.3	123.1	111.7	(9.2)
Sugarcane	51.2	57.1	57.7	1.0
Jute and Mesta	6.7	6.6	5.7	(13.1)
All Crops	1095.8	1066.9	1087.3	1.9

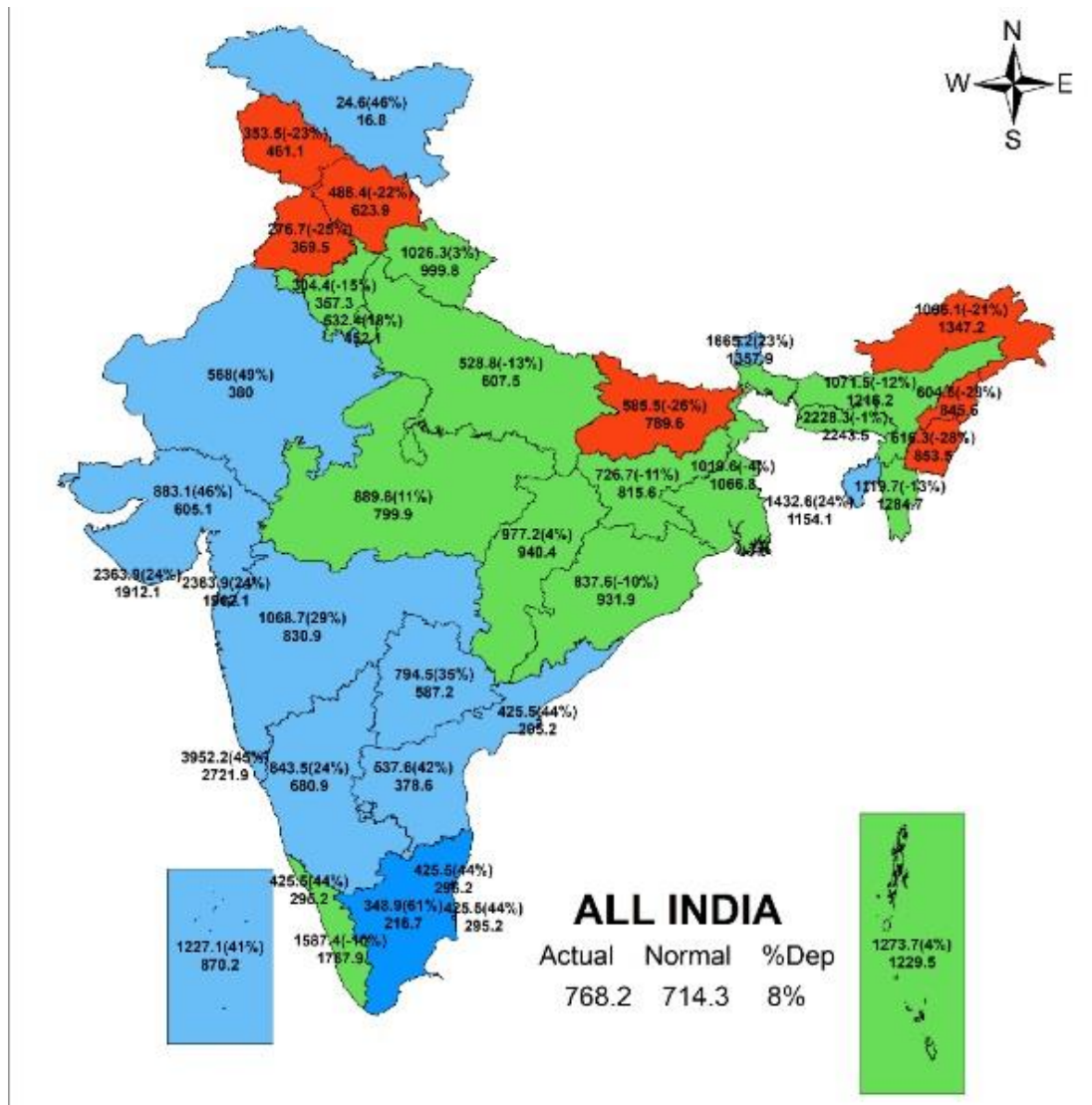
Source: PIB, Bank of Baroda Research | Data as of 2 Sep 2024

Monsoon:

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

- Most part of the country, specifically, Central, Eastern and parts of North-Eastern regions continue to receive normal rainfall so far. These include states like, M.P., U.P., Haryana, Delhi, Uttarakhand, Jharkhand, Chhattisgarh, W. Bengal, Odisha, Assam, Mizoram and Meghalaya.
- Kerala also received normal rainfall.
- Most parts of western and southern region of the country recorded excess rainfall. This includes states like Rajasthan, Gujarat, Maharashtra, Karnataka, Telangana and AP.
- Ladakh, Tripura and Sikkim also received excess rainfall.
- Tamil Nadu remains the only state to receive large excess of rainfall in this period.
- In contrast, J&K, Punjab, Himachal Pradesh, Bihar, Arunachal Pradesh, Nagaland and Manipur, have noted deficient rainfall till 2 Sep 2024.

Fig 1: Distribution pattern of South-West Monsoon



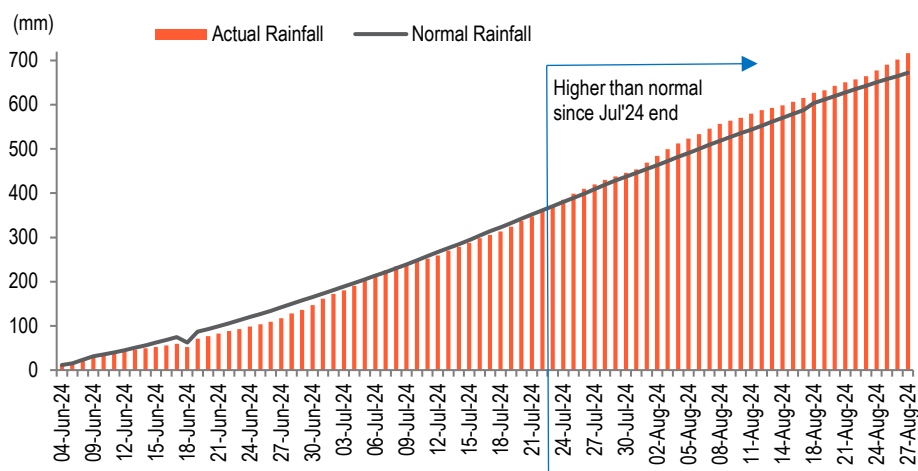
Source: IMD, Bank of Baroda Research | Period from 1 Jun-2 Sep 2024

Legend

Large Excess [60% or more] Excess [20% to 59%] Normal [-19% to 19%] Deficient [-59% to -20%] Large Deficient [-99% to -60%] No Rain [-100%] No Data

Overall, cumulative rainfall this year remains much higher so far at 768.2mm, compared with 634.1mm last year. It is even higher than the normal rainfall (714.3mm) received during this period.

Fig 2: Cumulative Distribution of rainfall



Source: CEIC, Bank of Baroda Research

Table 2 shows, 31 subdivision, which account for 85% of the total area, have received normal or above rainfall for cumulative period ranging from 1 Jun-2 Sep'24 and 5 sub-divisions have received deficient rainfall. Amongst states, there remain 8 states that have received deficient rainfall during this period.

Table 2: Subdivision wise distribution of Rainfall

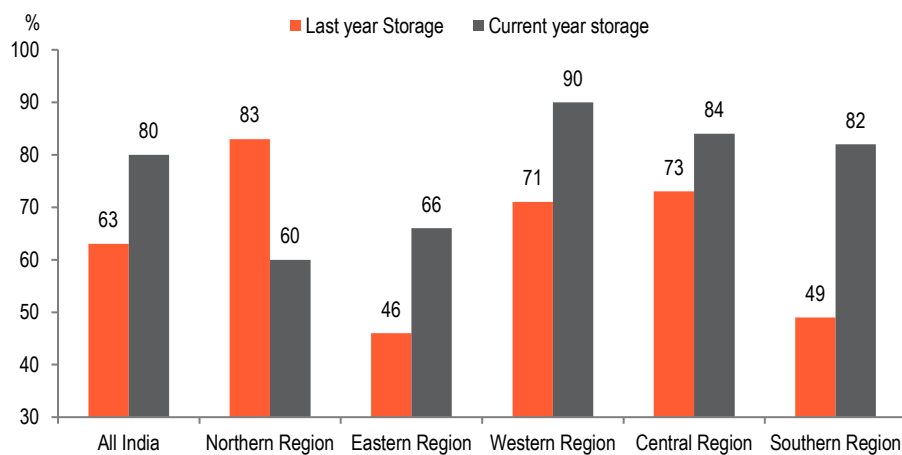
Period (1 Jun 2024-2 Sep 2024)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	3	13
Excess	10	23
Normal	18	49
Deficient	5	15
Large Deficient	0	0
No Rain	0	0

Source: IMD, Bank of Baroda Research

Reservoir storage status:

In terms of storage (Fig 3), the reservoir level as a % of total capacity stands at 80% as on 29 Aug 2024 (63% last year). All regions have noted an improvement over the last year, except for the Northern region (60% this year versus 83% last year). Amongst other regions, Western region has the highest reservoir level (90%), followed by Central (84%) and Southern (82%) regions.

Fig 3: Reservoir level across regions



Source: Central Water Commission, Bank of Baroda Research

Key points to note:

- Cumulatively (1 Jun-2 Sep 2024), India has received 768.2mm rainfall, which is higher than 634.1 mm recorded last year during the same period.
- It is even higher than the normal level of rainfall of 714.3mm.
- This implies the South-west monsoon is 8% above LPA compared so far.
- Higher than normal rainfall has helped the sown area. The acreage of paddy, coarse cereals, sugarcane and oilseeds has seen an improvement (YoY basis) till 2 Sep 2024 and even exceeded its normal sown area (2018-19 —2022-23).
- As of 29 Aug 2024, water reservoir levels remain higher than last year, with All India reservoir level at 80% of the total storage capacity versus 63% last year during the same period.

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