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Jahnavi Prabhakar
Economist

Monsoon and Sowing: Update

After a delayed start, South-West monsoon has picked up pace and registered below normal rainfall at only 13% (below LPA) till 29 Jun 2023. This has resulted in overall improvement in sown area. Though, acreage of pulses and rice continue to be lower compared with last year. The actual rainfall for this period has exceeded and moved past the normal range. Out of 36, 20 subdivisions have received deficient rainfall during this period and 16 states are in the deficient zone. On storage levels, Southern and Eastern region continue to record lower rainfall. The storage levels have also been lower in the Southern region. IMD expects the rainfall is expected to be normal 'most likely' in July. A major portion of sowing occurs during this 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 30th Jun 2023, overall sown area has improved by 0.4% compared with last year. Total sown area of cereals (7.4%) and oilseeds (14.6%) has risen. Amongst coarse cereals, the sowing area of crops such as Bajra and Jowar has risen the most. However, lower acreage has been registered for pulses (1.9%), cotton (13.9%) and jute & mesta (11.8%) for the same period. Within pulses, sown area of Arhar has declined the most, while that of Urad and Moong has grown by 6.8% and 28.6% respectively.

Table 1: Kharif Sowing

	Area sown in 2023-24 (mn ha)	Area sown in 2022-23 (mn ha)	Growth (YoY %)
Cereals	6.3	5.8	7.4
Rice	2.7	3.6	(26.3)
Pulses	1.8	1.9	(1.9)
Oilseeds	2.2	1.9	14.6
Cotton	4.0	4.7	(13.9)
Sugarcane	5.4	5.3	2.8
Jute and Mesta	0.6	0.7	(11.8)
All Crops	20.32	20.2	0.4

Source: CEIC, Bank of Baroda | Data as of 30 Jun 2023

Monsoon:

For the period 1 Jun 2023 to 29 Jun 2023, South West Monsoon is 13% below LPA compared with last year.

- Western region of India including states such as Rajasthan and Gujarat have received excess rainfall. Furthermore states such as Punjab, Haryana and Himachal Pradesh too have registered excess rainfall.
- Madhya Pradesh, Tamil Nadu, Chhattisgarh, West Bengal and other North Eastern states such as Assam, Sikkim and Meghalaya have received normal rainfall.

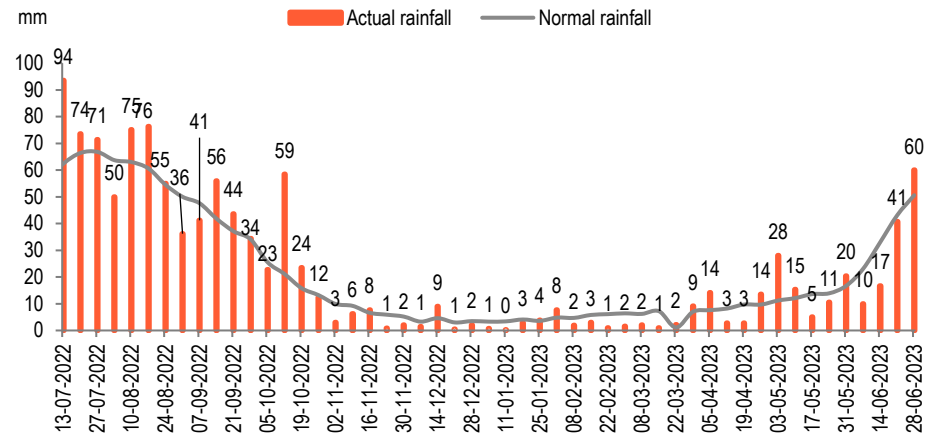
- On the other hand, following states including Delhi, Uttar Pradesh, Bihar, Jharkhand and Odisha have been lagging behind other dates and have received deficient rainfall. Other states such as Maharashtra, Telangana, and Karnataka have also received less rainfall.

Fig 1: Distribution pattern of South-West Monsoon

Source: IMD, Bank of Baroda Research | Period from 1 Jun-29 Jun 2023.

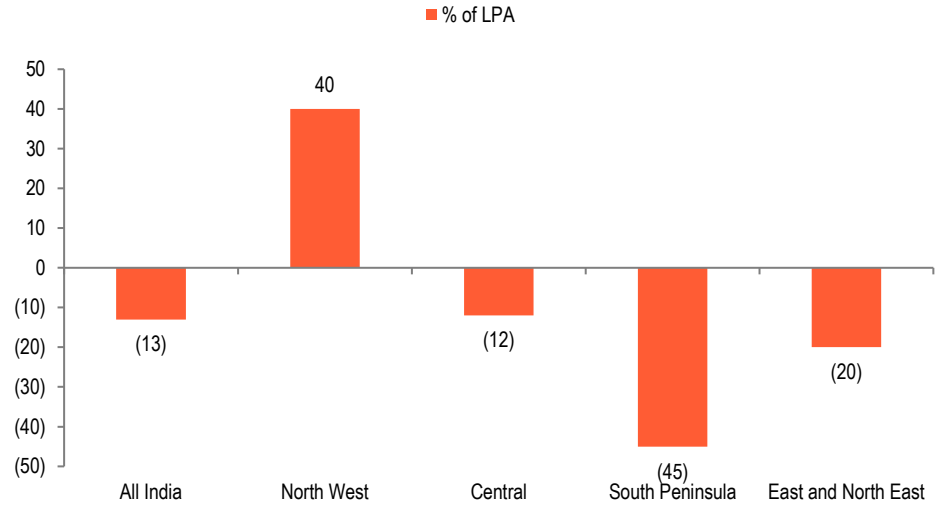
In Fig2, actual rainfall this year has been comparatively less than last year (60mm versus 71mm). It is much higher than the normal rainfall. Fig 3, explains regions wise distribution of rainfall. With the exception of North West region, all the other regions such as South Peninsula (45% below LPA), East (20% below LPA) and Central region is witnessing lower rainfall (12% below 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 20 subdivision have received deficient rainfall for cumulative period ranging from 1 Jun-29 Jun'23. Amongst states too, there are over 16 states that have received deficient rainfall during this period.

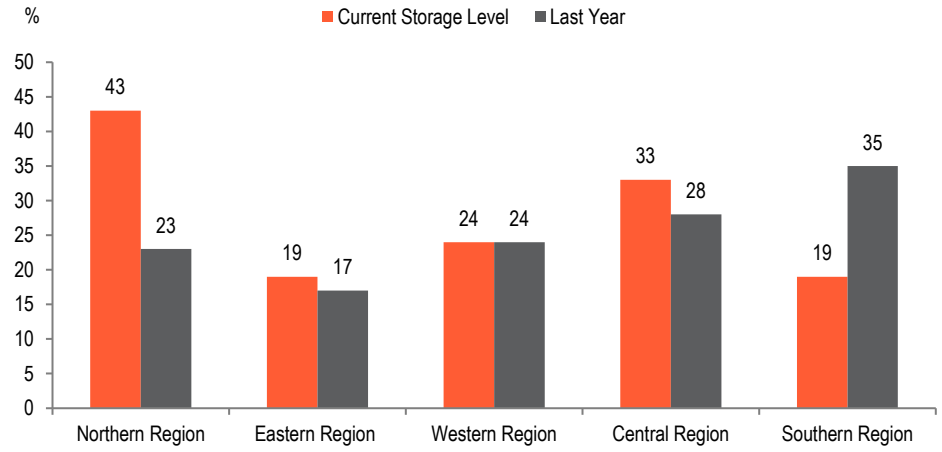
In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 27% as on 30 Jun 2023. Amongst regions, Northern region has the highest reservoir level (43% against 23% last year), followed by Central (33% versus 28% last year), Western (24%), Eastern region (19% against 17%). Reservoir level is lower in Southern region at 19% versus 35% last year.

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2023-29 Jun 2023)	No. of Subdivisions	Subdivisional % area of Country
Large Excess	3	14%
Excess	5	12%
Normal	8	27%
Deficient	17	41%
Large Deficient	3	6%
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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For further details about this publication, please contact:

Economics Research Department
Bank of Baroda
+91 22 6698 5143
chief.economist@bankofbaroda.com
jahnavi@bankofbaroda.com