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Monsoon and Sowing: Update

India's South-West monsoon cumulatively stands at 10% below LPA till 11 Sep 2023. Sparsity of rainfall has resulted in kharif sowing standing at the same levels as last year, with lower sowing area of pulses, oilseeds and cotton. All regions have recorded lower rainfall. Furthermore, 8 subdivisions and 6 states, have received scanty rainfall during this period (1 June-11 Sep 2023). Erratic rainfall is expected to impact crop output and push domestic prices higher. However, supply side intervention by government might keep a check on rising prices. RBI also expects inflation will start easing in Q3FY24.

Where does Kharif sowing stand?

Overall total kharif sowing as of 8 Sep 2023 stands at the same level as last year levels at 1088.5 lakh ha. Sowing of coarse cereals has improved by 0.5% supported by higher sowing of Maize (2.9% and Bajra (0.5%). Rice and sugarcane sown area has expanded further by 2.7% and 7.6% respectively. Conversely, acreage of pulses lags behind by (-) 8.6% led by lower sowing area of Arhar (5.9%) and Urad (14%). Additionally, Sowing area of cotton and jute & mesta has declined by (-) 1.5% and (-) 5.7% compared with the last year levels. Even oilseeds area is down by (-) 0.9%, though soybean registered an improvement.

Table 1: Kharif Sowing

	Area sown in 2023-24 (Lakh ha)	Area sown in 2022-23 (Lakh ha)	Change (YoY %)
Coarse Cereals	182.2	181.2	0.5
Jowar	14.1	15.6	(9.6)
Bajra	70.8	70.5	0.5
Maize	83.3	81.0	2.9
Rice	403.4	392.81	2.7
Pulses	119.9	131.2	(8.6)
Oilseeds	191.5	193.3	(0.9)
Cotton	125	126.9	(1.5)
Sugarcane	59.9	55.7	7.6
Jute and Mesta	6.6	7.0	(5.7)
All Crops	1088.5	1088.1	0

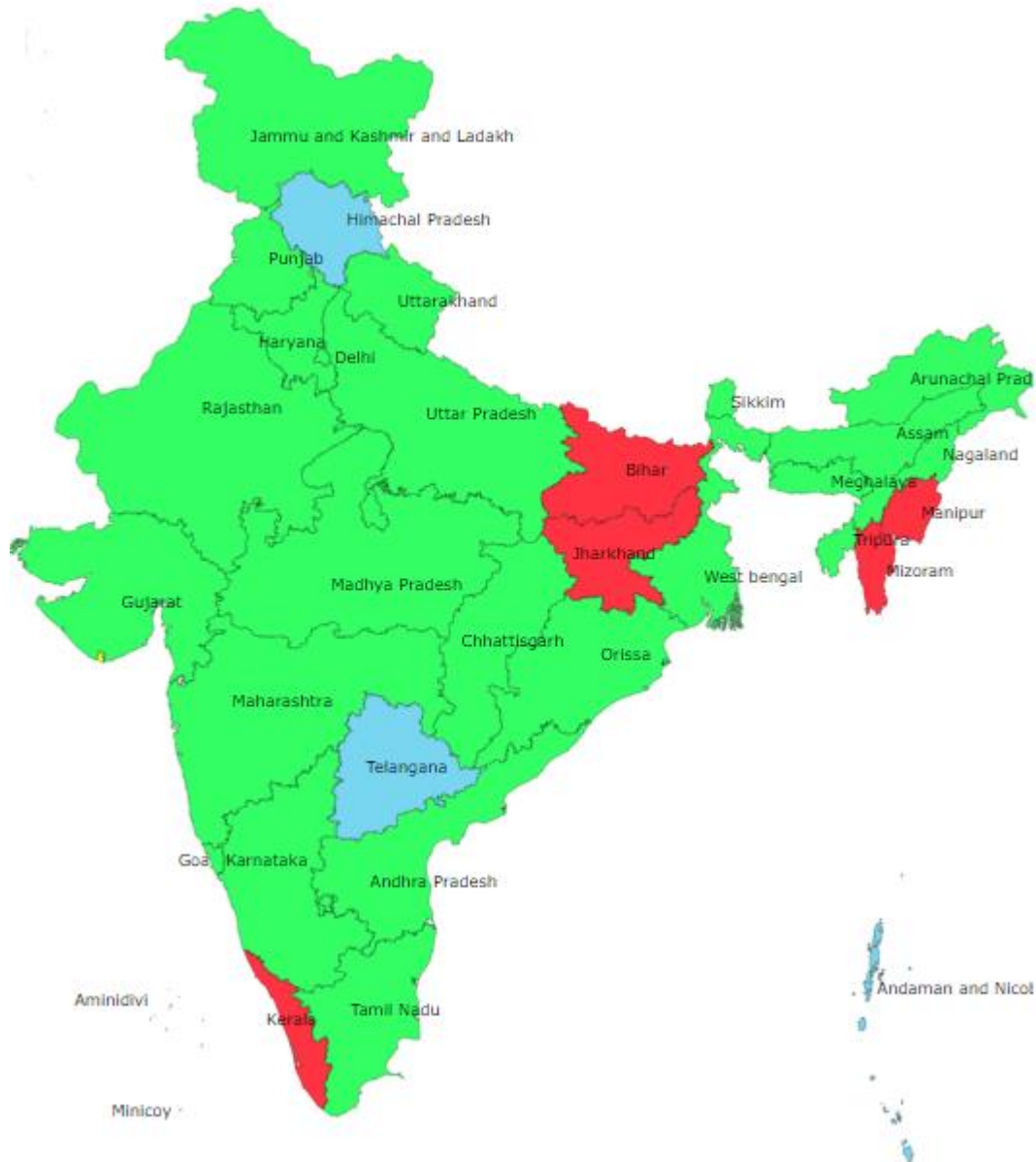Source: CEIC, Bank of Baroda | Data as of 8 Sep 2023

Monsoon:

For the period 1 Jun 2023 to 11 Sep 2023, South West Monsoon is 10% below LPA compared with last year.
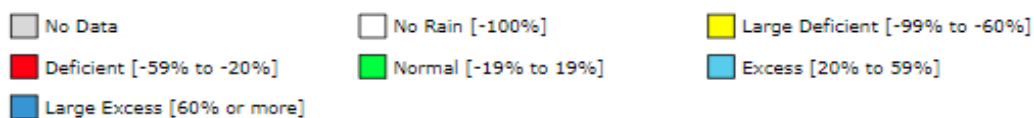
- Most of the states across India has been witnessing normal rainfall. Some of these include, Madhya Pradesh, Gujarat, Maharashtra, Uttar Pradesh, Tamil Nadu and Rajasthan. Telangana and Himachal Pradesh are the only states to receive excessive rainfall during this period.

- 6 of the states have been receiving scanty rainfall, these are Bihar, Jharkhand, Kerala, Mizoram, Tripura and Manipur.
- IMD expects El Nino conditions to intensify and continue till even next year. These conditions are currently weak and prevailing over the Equatorial pacific region.

**Fig 1: Distribution pattern of South-West Monsoon**

Source: IMD, Bank of Baroda Research | Period from 1 Jun-11 Sep 2023.

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

In Fig2, actual rainfall this year continues to be comparatively less than last year (29mm versus 41mm). It also is far lower than the normal rainfall (47.7mm). Fig 3, explains regions wise distribution of rainfall. All the regions have been on the receiving end of the deficient rainfall. East and North East
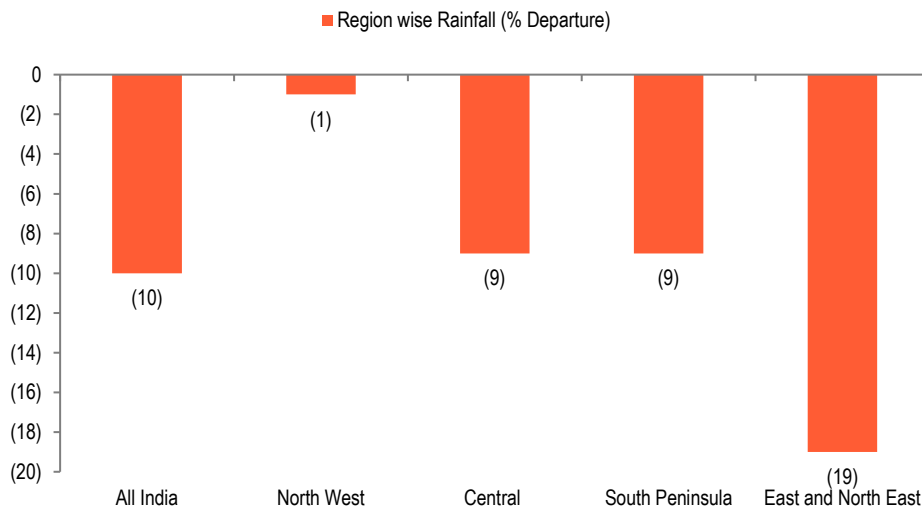
(19% below LPA), South Peninsula (10% below LPA), Central (9% below LPA) and North West (1% below LPA) region have been struggling with lower rainfall.

Fig 2: Weekly distribution of rainfall
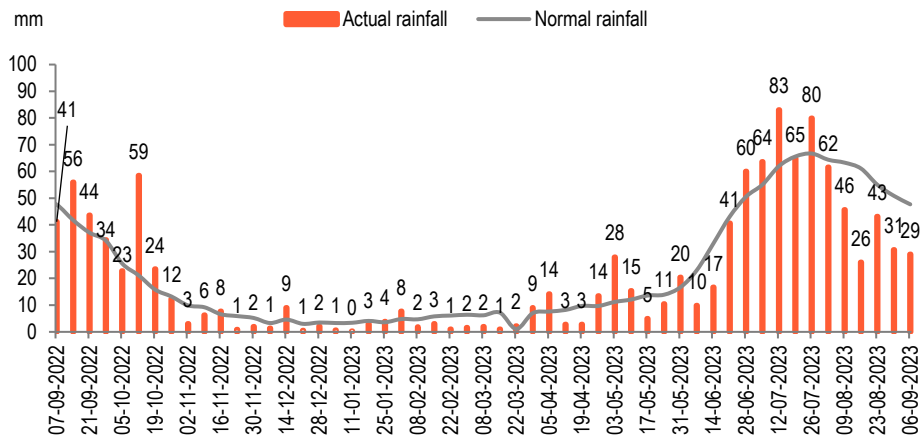
Source: CEIC, Bank of Baroda

Fig 3: Region-wise deviation of rainfall

Source: CEIC, Bank of Baroda

In the table 2, mentioned below, for cumulative period ranging from 1 Jun-11 Sep'23, out of 36 subdivisions, 8 have received lower rainfall (12 subdivisions-last week). During the same period, there are 6 states (7- last week) that are in the deficient zone.

In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 62% as on 6 Sep 2023 compared with 84% for the last season. Total live storage available in 150 reservoirs stands at 74% of storage of last year and 86% of average storage for last 10 years. Across the regions, the reservoir levels this year has been far lower than last year levels, Northern region (82% versus 87% last year), Central (71% versus 81% last year), Western (71% versus 89%) and Eastern region (45% versus 62%) and Southern region (48% against 91%).

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2023-11 Sep 2023)	No. of Subdivisions	Sub-division % area of Country
Large Excess	0	0%
Excess	5	15%
Normal	23	67%
Deficient	8	18%
Large Deficient	0	0%
No Rain	0	0%

Source: IMD, Bank of Baroda

Fig 4: Reservoir level across regions
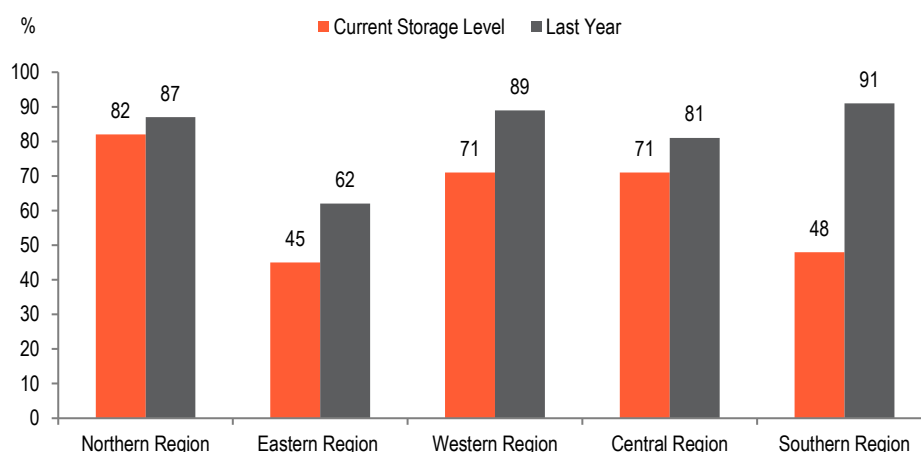
Source: Central Water Commission, Bank of Baroda

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