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Monsoon and Sowing: Update

For the period till date (upto 15 Sep'23), monsoon activity is in deficit zone at 9% below LPA. Kharif sowing is tracking marginally higher than last year levels with pulses, oilseeds and cotton acreage lagging behind on account of uneven distribution of rainfall. This might result in lower crop yield. Lower reservoir level also pose risk for rabi sowing. With the kharif sowing drawing to a close soon, government has kept a higher procurement target of 521.3 lakh tonne (518 lakh tonnes last year) for rice as the marketing season begin in Oct'23. Risk of lower crop yield might push the prices higher, however government has proactively made efforts in addressing the rising prices. These include reducing the prices for LPG, restriction on exports of rice, amongst others.

Where does Kharif sowing stand?

As of 15 Sep 2023, India's overall kharif sowing is marginally up by 0.3% compared with last year. On the back of improvement in sowing levels of Bajra and Maize, sown area of coarse cereals have advanced by 0.9%. Sown area of rice and sugarcane have advanced further by 2.7% and 7.7% respectively. However pulses acreage continue to lag behind, down by (-) 5.2% on the back of scanty rainfall with Arhar sowing down by (-) 5.6% and Urad sowing lower by (-) 2.2%. Moreover, sowing area under cultivation for cotton as well as Jute and Mesta crops has also dropped by (-) 3.2% and (-) 5.7% respectively for the same period. Oilseeds sowing area has too declined by (-) 1.1% even as soyabean continue to register an uptick.

Table 1: Kharif Sowing

	Area sown in 2023-24 (Lakh ha)	Area sown in 2022-23 (Lakh ha)	Change (YoY %)
Coarse Cereals	183.1	181.5	0.9
Jowar	14.2	15.7	(9.3)
Bajra	70.9	70.5	0.6
Maize	83.7	81.1	3.1
Rice	409.4	398.6	2.7
Pulses	121.0	127.6	(5.2)
Oilseeds	192.2	194.3	(1.1)
Cotton	123.2	127.4	(3.2)
Sugarcane	59.9	55.7	7.7
Jute and Mesta	6.6	7.0	(5.7)
All Crops	1095.4	1091.9	0.3

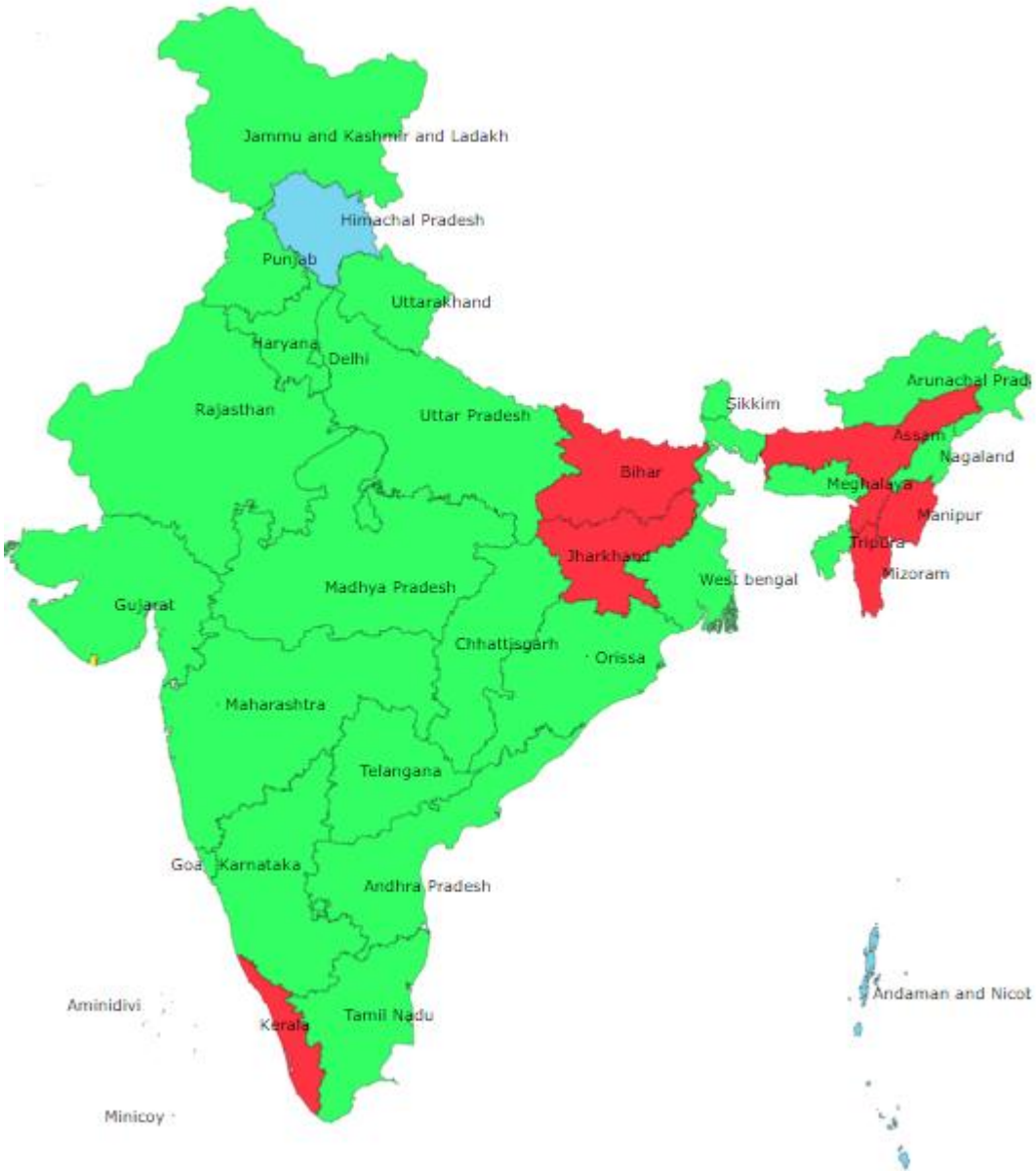
Source: CEIC, Bank of Baroda | Data as of 16 Sep 2023

Monsoon:

For the period 1 Jun 2023 to 15 Sep 2023, South West Monsoon is 9% below LPA compared with last year.

- After receiving normal rainfall in most of the states across country, certain states such as Kerala, Bihar, Jharkhand and some states in North East region have received deficient rainfall.
- According to the IMD, positive IOD conditions are prevailing over the Indian Ocean and are expected to strengthen in the coming months. In the next two weeks, IMD expects overall monsoon rainfall activity to be above normal in the entire country.

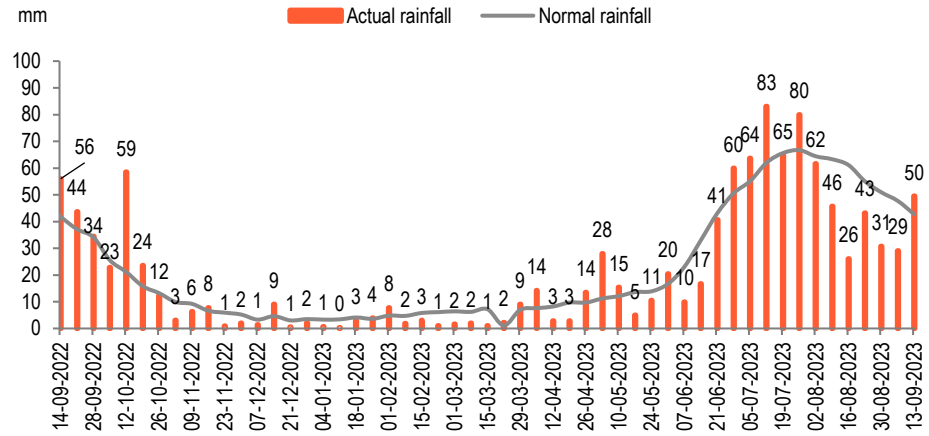
Fig 1: Distribution pattern of South-West Monsoon



Source: IMD, Bank of Baroda Research | Period from 1 Jun-15 Sep 2023.

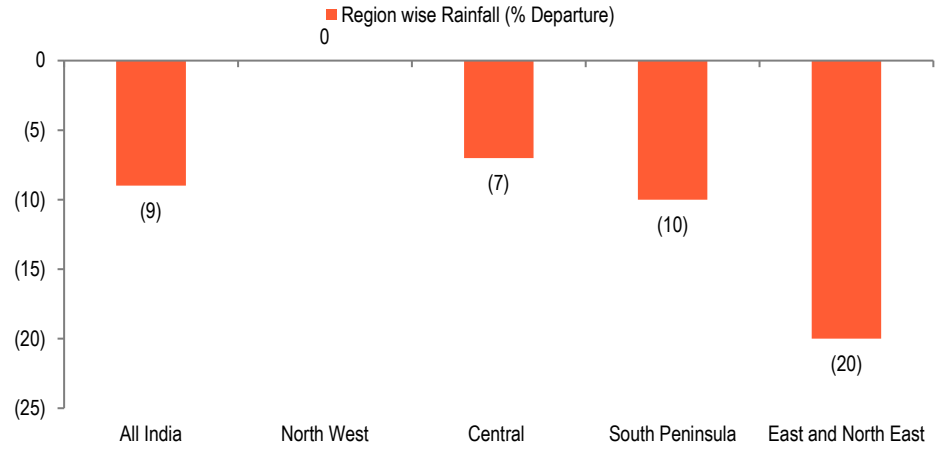
In Fig2, actual rainfall this year is comparatively lower than last year (50mm versus 56mm). However, it is higher than the normal rainfall (42.7mm). Fig 3, explains regions wise distribution of rainfall. Barring, North West regions, all the other regions have been on the receiving end of the deficient rainfall. East and North East (20% below LPA), South Peninsula (10% below LPA) and Central (7% 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-15 Sep'23, out of 36 subdivisions, 10 have received lower rainfall (8 subdivisions-last week). During the same period, there are 6 states (same as last week) that are in the deficient zone.

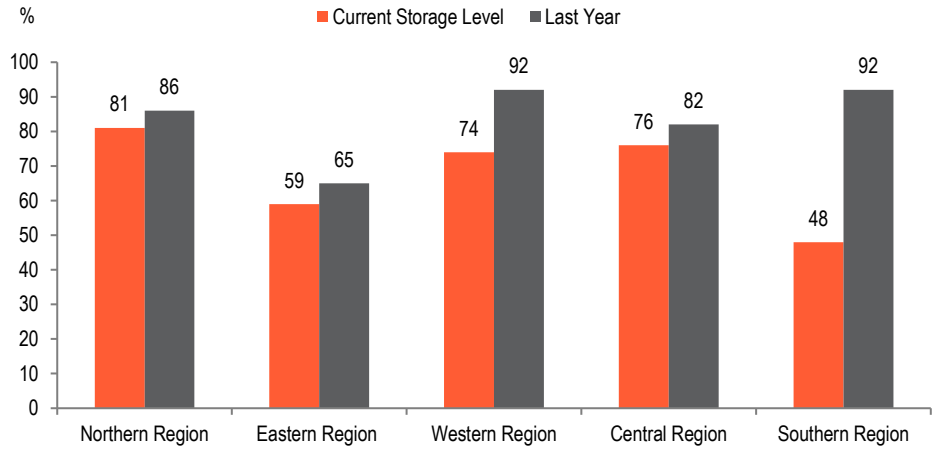
In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 66% as on 14 Sep 2023 compared with 86% for the last season. Total live storage available in 150 reservoirs stands at 77% of storage of last year and 88% of average storage for last 10 years. Region wise, the reservoir levels this year has been far lower than last year levels, Northern region (81% versus 86% last year), Central (76% versus 82% last year), Western (74% versus 92%) and Eastern region (59% versus 65%) and Southern region (48% against 92%).

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2023-15 Sep 2023)	No. of Subdivisions	Sub-division % area of Country
Large Excess	0	0%
Excess	4	11%
Normal	22	63%
Deficient	10	26%
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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