

Monsoon and Sowing: Update

India's South West Monsoon slowed down marginally to 3% below LPA (5% surplus last week) compared with 8% surplus last year for the same period. The uneven distribution of rainfall has adversely impacted the sowing levels of certain crops. Overall, kharif sowing has registered an improvement on the back of higher acreage from rice, sugarcane and coarse cereals. Pulses sowing have also made some recovery since last week, though it continues to be lower than last year. Lower acreage in pulses might have an impact on inflation in the coming months. Region wise, distribution of rainfall in South Peninsula and Eastern regions remains in the deficient zone. There is a need for careful monitoring as rainfall will begin receding in certain regions in the coming weeks.

Where does Kharif sowing stand?

As of 11 Aug 2023, overall Kharif sowing area has improved by 0.8% (0.4% in the previous week) since last year. Acreage of rice has continued to advance further, up by 4.9% (3.4% last week) compared with last year. Even coarse cereals have registered an uptick in sowing (higher 2.2%) on the back of higher sowing in both Maize and Bajra. Sowing levels of Sugarcane too continue to be higher at 1.6% against last year. On the other hand, Pulses sowing continue to be in red (-7.9%) compared with last year, though it has made some improvement since last week (-9.3%). Urad and Arhar continue to record lower sowing at (-) 13.5% and (-) 5.4% respectively. Additionally, Cotton (-1%) along with Jute & Mesta (-5.6%) have logged lower acreage than last year. Further while the oilseeds acreage is lower than last year, these shortages are in groundnut, sunflower and Sesamum.

Table 1: Kharif Sowing

	Area sown in 2023-24 (Lakh ha)	Area sown in 2022-23 (Lakh ha)	Change (YoY %)
Coarse Cereals	171.4	167.7	2.2
Jowar	13.3	14.1	(5.6)
Bajra	68.8	68.0	1.1
Maize	79.2	77.5	2.2
Rice	328.2	312.8	4.9
Pulses	113.1	122.8	(7.9)
Oilseeds	183.3	184.6	(0.7)
Cotton	121.3	122.5	(1.0)
Sugarcane	56.1	55.2	1.6
Jute and Mesta	6.6	7.0	(5.6)
All Crops	979.9	972.6	0.8

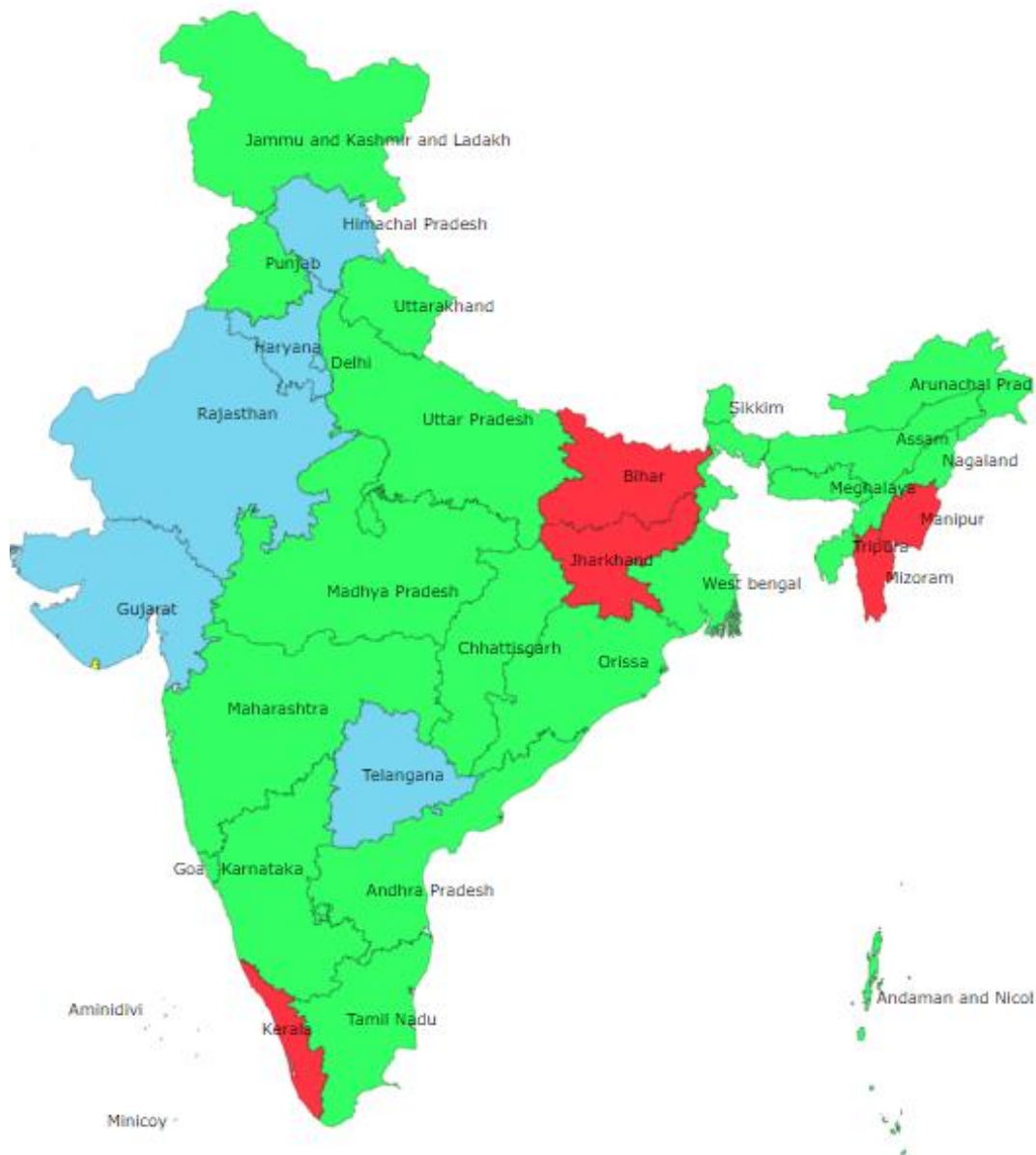
Source: CEIC, Bank of Baroda | Data as of 11 Aug 2023

Monsoon:

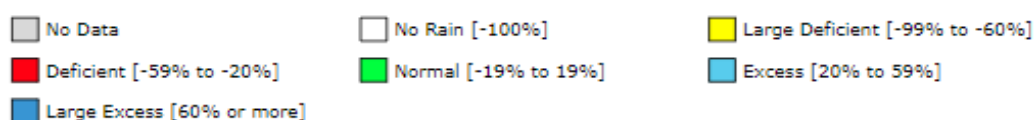
For the period 1 Jun 2023 to 13 Aug 2023, South West Monsoon is 3% below LPA compared with last year.

- Parts of Northern and Central region of the country have received normal rainfall. These include states such as Punjab, Maharashtra, Madhya Pradesh, Uttar Pradesh, Chhattisgarh and Odisha.
- Even certain states in the Southern region with the likes of Tamil Nadu, Andhra Pradesh and Karnataka have also received normal rainfall during the same period.
- There are only 6 states that have received deficient rainfall. These include, Bihar, Jharkhand, Kerala and certain North Eastern states such as Manipur, Mizoram and Tripura.
- On the other hand, some states have received excessive rainfall. Telangana, Gujarat, Haryana and Himachal Pradesh have witnessed heavy rains during this period.
- IMD expects heavy rainfall in Himachal Pradesh, Uttarakhand, Bihar with a warning of a possible landslides also in certain regions. Overall, there is an expectation of above normal rainfall in the Central region of the country.

Fig 1: Distribution pattern of South-West Monsoon

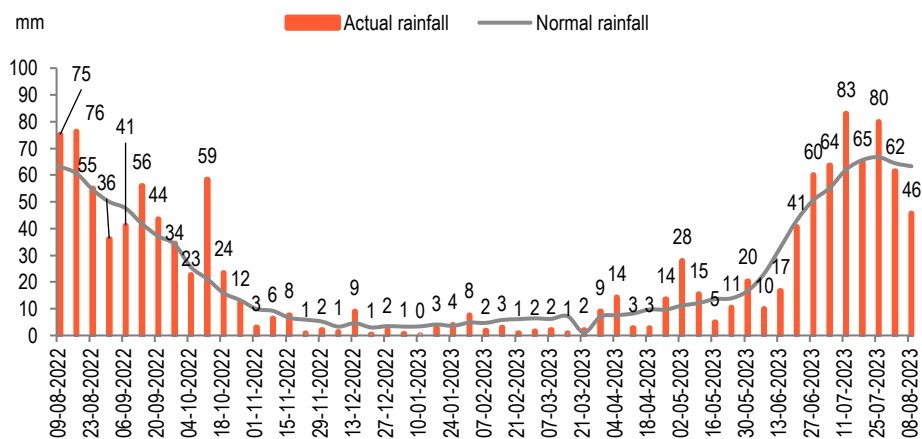


Source: IMD, Bank of Baroda Research | Period from 1 Jun-13 Aug 2023.



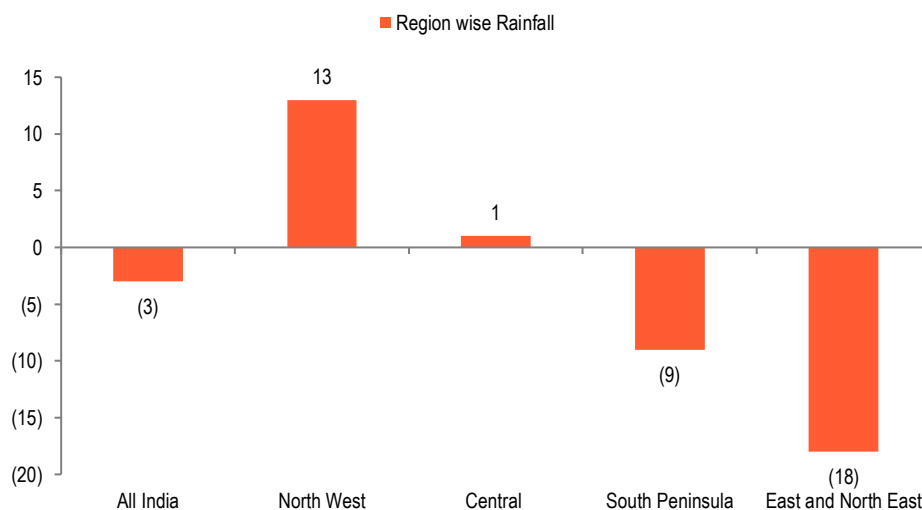
In Fig2, actual rainfall this year has been comparatively less than last year (46mm versus 75mm). It also continues to be lower than the normal rainfall. Fig 3, explains regions wise distribution of rainfall. Currently only North Western region (13% above LPA) and Central Region (1% above LPA) have received surplus rainfall. Other regions, including Southern Peninsula (9% below LPA) and East and North eastern region (18% below LPA) continue to receive deficient rainfall and needs a careful watch.

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-13 Aug'23, over 9 subdivision (out of 36) have received lower rainfall, higher than last week (7 subdivisions). Amongst states, there are 6 states (previous week: 7) that remain in the deficient zone during this period.

In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 62% as on 10 Aug 2023 compared with 66% for the last season. Total live storage available in 146 reservoirs stands at 94% of storage of last year and 108% of average storage for last 10 years. Within regions, Northern region continues to have the highest reservoir levels (78% against 58% last year) and Central (69% versus

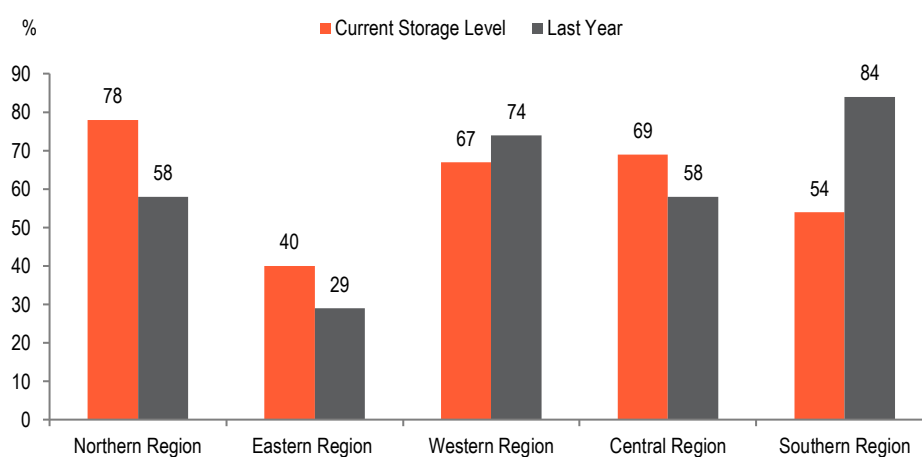
58% last year) and Eastern region (40% versus 29%). On the other hand, Western (67% versus 74%) and Southern region (54% against 84%) have lower reservoir level compared with last year.

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2023-4 Aug 2023)	No. of Subdivisions	Sub-division % area of Country
Large Excess	2	9%
Excess	3	7%
Normal	22	64%
Deficient	9	20%
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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