

Monsoon and Sowing: Update

For the cumulative period till 18th August, India's South West Monsoon is down by 6% below LPA (3% below LPA last week) compared with 9% surplus last year for the same period. Region wise distribution signal the uneven distribution with only north Western region receiving higher rainfall, while all the other regions have received scanty rainfall. This uneven spread of rainfall has also impacted the kharif sowing which is marginally up (0.1%) from last year. With sowing season about to end, pulses sowing has declined further and is expected to be largely lower. The impact of the same might be visible on inflation. However, in some relief, rice sowing have logged in at much higher level than last year. Monitoring of rainfall spread in the coming weeks will shed more light on the evolving picture.

Where does Kharif sowing stand?

Total Kharif sowing area has improved by only 0.1% as of 18 Aug 2023 (0.8% in the previous week) compared with last year. Sowing area of coarse cereals inched up by 1.6% led by higher sowing in Bajra (1.1%) and Maize (2.2%). Acreage of rice has improved by 4.3% compared with last year. Sugarcane sowing too continue to advance further by 1.3%. On the other hand, acreage of pulses (-9.2%) has declined further (-7.9% previous week) from last year on the back of lower sowing in both Arhar (-6.4%) and Tur (-15.3%). Notably, oilseeds (-1.7%), cotton (-1.9%) and Jute & Mesta (-5.6%) have all logged in lower sowing than last year. Within oilseeds, groundnut, sunflower and sesamum have contributed to the dip in sowing levels.

Table 1: Kharif Sowing

	Area sown in 2023-24 (Lakh ha)	Area sown in 2022-23 (Lakh ha)	Change (YoY %)
Coarse Cereals	176.4	173.6	1.6
Jowar	13.7	14.8	(7.3)
Bajra	69.7	68.9	1.1
Maize	81.2	79.4	2.2
Rice	360.8	345.8	4.3
Pulses	114.9	126.5	(9.2)
Oilseeds	185.9	189.1	(1.7)
Cotton	121.9	124.2	(1.9)
Sugarcane	56.1	55.3	1.3
Jute and Mesta	6.6	6.9	(5.6)
All Crops	1022.5	1021.5	0.1

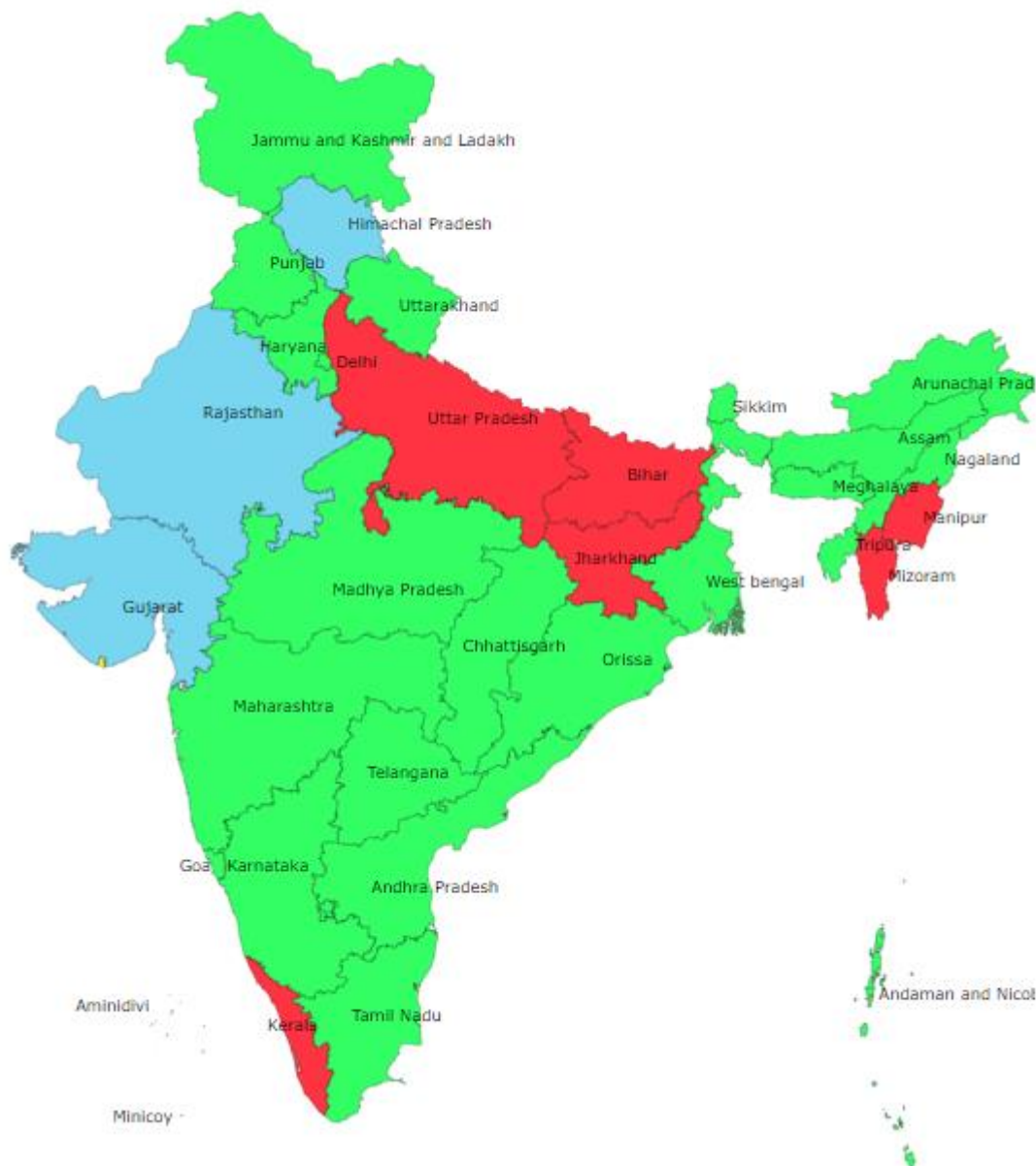
Source: CEIC, Bank of Baroda | Data as of 18 Aug 2023

Monsoon:

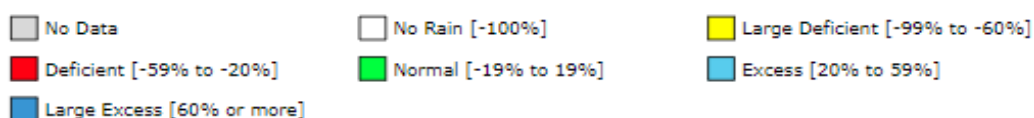
For the period 1 Jun 2023 to 18 Aug 2023, South West Monsoon is 6% below LPA compared with last year.

- Out of 36 states, 7 of them have been in the deficient zone. These include states such as Delhi, Uttar Pradesh, Bihar, Jharkhand, Manipur, Tripura, Mizoram and Kerala.
- Western part of the country with states such as Gujarat and Rajasthan have been witnessing surplus rainfall. Additionally, Himachal Pradesh too have received excessive rainfall during this period.
- On the other hand, other parts of the country have registered normal rainfall.
- IMD expects fairly widespread to scattered rainfall in the Central regions with the likelihood of scattered to isolated rainfall activity in other parts of the country.
- For the coming week, the rainfall activity will be above normal in the Eastern region, while it will be below normal in the North West and South Peninsular India.

Fig 1: Distribution pattern of South-West Monsoon

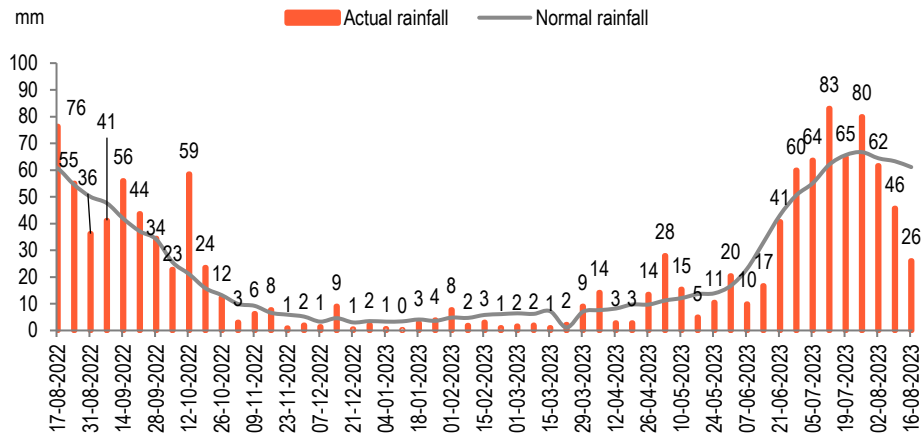


Source: IMD, Bank of Baroda Research | Period from 1 Jun-18 Aug 2023.



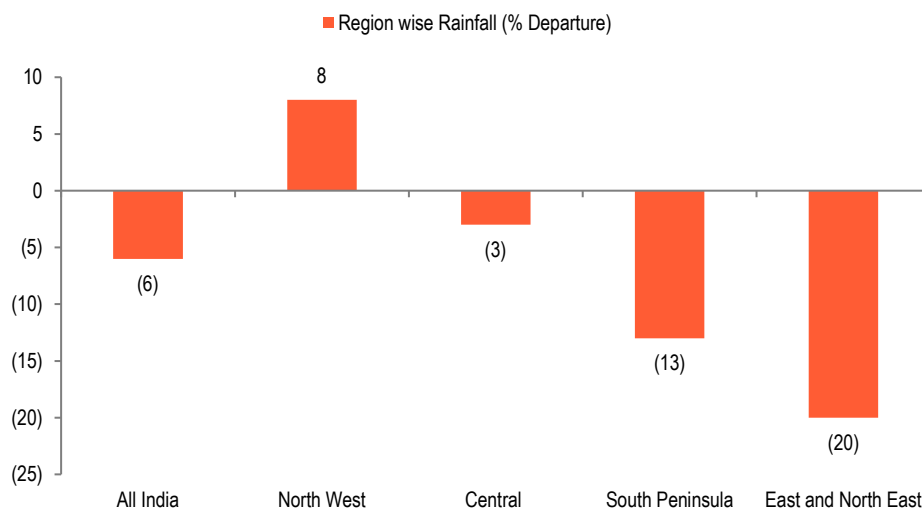
In Fig2, actual rainfall this year has been comparatively less than last year (26mm versus 76mm). It also continues to be far lower than the normal rainfall. Fig 3, explains regions wise distribution of rainfall. With the exception of North Western region (8% above LPA), all the other region continue to receive deficient rainfall, including Central Region (3% below LPA), Southern Peninsula (13% below LPA) and East and North eastern region (20% 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, for cumulative period ranging from 1 Jun-18 Aug'23, over 9 subdivision (out of 36) have received lower rainfall, same as last week. During the same period, there are 7 states that continue to remain in the deficient zone.

In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 62% as on 17 Aug 2023 compared with 76% for the last season. Total live storage available in 146 reservoirs stands at 82% of storage of last year and 99% of average storage for last 10 years. Within regions, only Northern region have the highest reservoir levels (88% against 73% last year). Other regions such as Central (69%

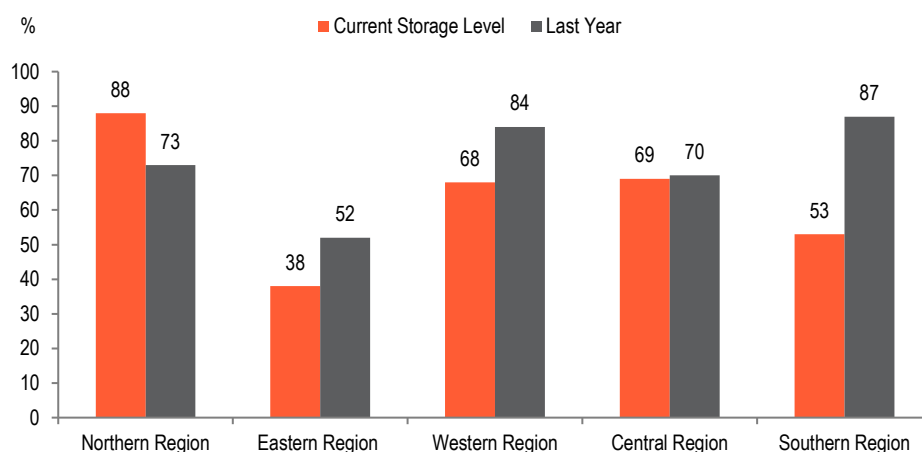
versus 70% last year), Western (68% versus 84%) along with Eastern region (38% versus 52%) and Southern region (53% against 87%) have lower reservoir level this year compared with last year.

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2023-18 Aug 2023)	No. of Subdivisions	Sub-division % area of Country
Large Excess	2	9%
Excess	1	2%
Normal	24	69%
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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