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Monsoon and Sowing: Update

India's South-West monsoon continues to engulf the entire country resulting in higher rainfall at 1% (above LPA) till 14 Jul 2023. However, paucity of rainfall in some states has kept kharif sowing lower compared with last year. Rice and pulses continue to register lower acreage. Region wise, Southern peninsula and Eastern region have recorded lower rainfall and needs further monitoring. In terms of subdivisions and states, 15 and 12 respectively have received deficient rainfall during this period (1 Jun-14 Jul 2023). Additionally, Prospects of El Nino occurrence seems more likely in the middle of the monsoon. Excessive rainfall in some regions also needs to be tracked as IMD continues to issue flood alert around the same.

Where does Kharif sowing stand?

As of 15 Jul 2023, the overall sown area of kharif crops have declined by (-) 2.0% (-8.7% in the previous week) compared with last year. Total sown area of coarse cereals has increased by 15.9% led by Jowar (26.7%) and Bajra (45.7%). Though, maize sowing was relatively lower at (-) 5.6% compared with last year. Acreage of rice continues to be lower at (-) 6.1%. However, the sowing has improved from previous week (-23.9%). Cotton (-11.6%) and Jute & Mesta (7.8%) have registered much lower sowing this year. Moreover, pulses sowing continues to be lower this year with Arhar recording a sharp decline (-38.2%). On the other hand, Sugarcane and oilseeds sowing are higher than last year at 4.7% and 1.6% respectively.

Table 1: Kharif Sowing

	Area sown in 2023-24 (Lakh ha)	Area sown in 2022-23 (Lakh ha)	Change (YoY %)
Coarse Cereals	104.9	90.6	15.9
Jowar	8.6	6.8	26.7
Bajra	50.1	34.4	45.7
Maize	43.8	46.4	(5.6)
Rice	123.2	131.2	(6.1)
Pulses	66.9	77.1	(13.3)
Oilseeds	139.2	136.9	1.6
Cotton	96.3	108.9	(11.6)
Sugarcane	55.8	53.3	4.7
Jute and Mesta	6.4	6.9	(7.8)
All Crops	592.7	605.7	(2.0)

Source: CEIC, Bank of Baroda | Data as of 15 Jul 2023

Monsoon:

For the period 1 Jun 2023 to 14 Jul 2023, South West Monsoon is 1% above LPA compared with last year.

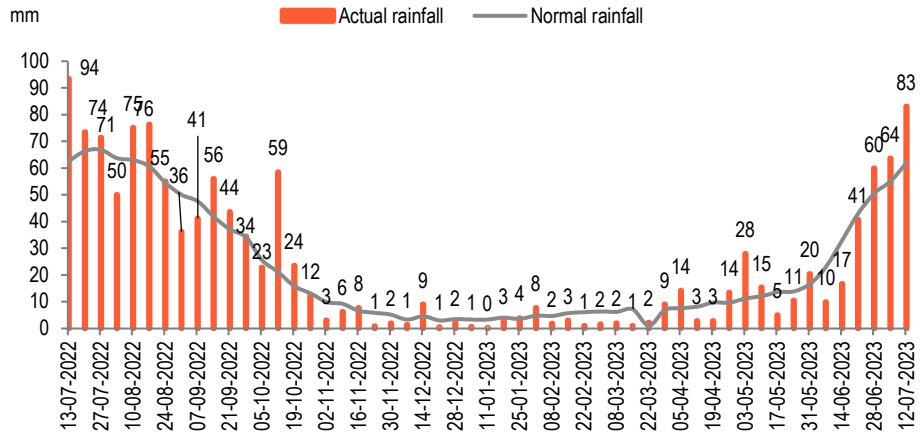
- Deficient rains in the Deccan plateau (excl Tamil Nadu) continues to remain a cause of concern. Additionally states such as Bihar, Jharkhand and North Eastern states (Nagaland, Manipur, Mizoram and Arunachal Pradesh) too have received below normal rainfall.
- Western and Northern region of the country continue to be on the receiving end of the excess rainfall. This in turn has also resulted in flood like situations in states such as Himachal Pradesh, parts of Delhi, Chandigarh and Haryana.
- Some states such as Jammu & Kashmir, Uttar Pradesh, Madhya Pradesh and West Bengal have received normal rainfall in this period.
- IMD has forecasted in the coming few days, there is a possibility of fairly widespread to moderate rainfall in most parts of the country with the exception of West Rajasthan, Andhra Pradesh, Tamil Nadu and South Interior Karnataka. It also noted that the likelihood of El Nino forming is more pronounced during the middle of the monsoon and might continue till the beginning of the next year.

Fig 1: Distribution pattern of South-West Monsoon

Source: IMD, Bank of Baroda Research | Period from 1 Jun-14 Jul 2023.

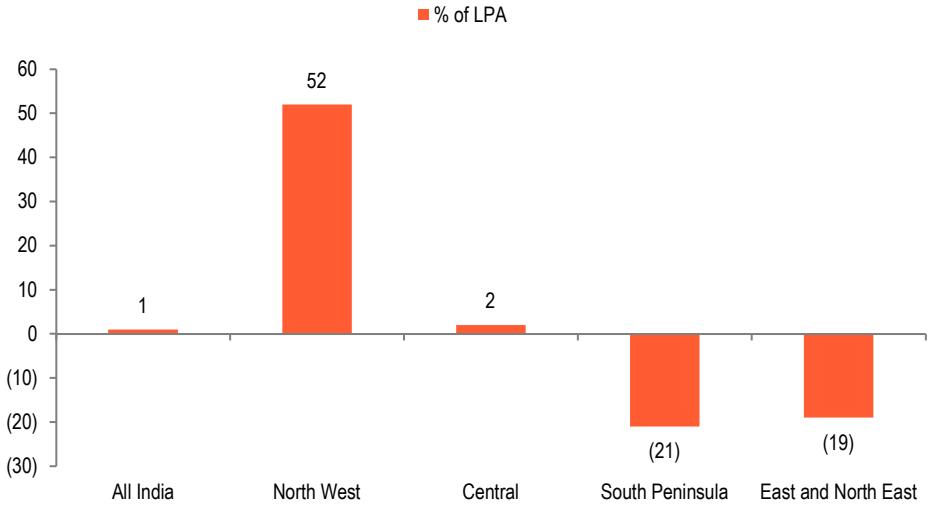
In Fig2, actual rainfall this year has been comparatively less than last year (83mm versus 94mm). It continues to be much higher than the normal rainfall. Fig 3, explains regions wise distribution of rainfall. North West (52% above LPA) and Central (2% above LPA) region have registered much higher rainfall than the other regions. South Peninsula (21% below LPA) and Eastern (19% below LPA) have recorded deficient 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, over 15 subdivision (out of 36) have received deficient rainfall (same as previous week) for cumulative period ranging from 1 Jun-14 Jul'23. Amongst states too, there are over 12 states that have received lower rainfall during this period.

In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 33% as on 13 Jul 2023. Total live storage available in 146 reservoirs stands at 85% of storage of last year and 110% of average storage for last 10 years. Within regions, Northern region continues to top the charts with higher reservoir level (64% against 26% last year), followed by Central (40% versus 37% last year) and Eastern

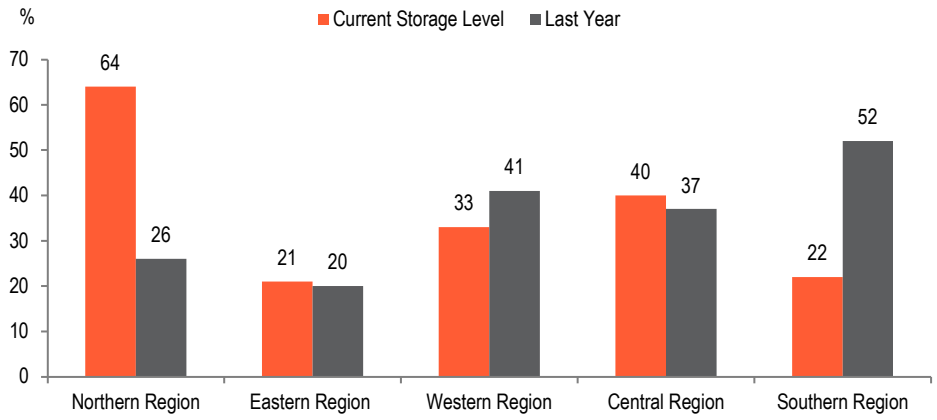
region (21% versus 20%). On the other hand, Western (33% versus 41%) and Southern region (22% against 52%) have lower reservoir level compared with last year.

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2023-14 Jul 2023)	No. of Subdivisions	Subdivisional % area of Country
Large Excess	7	21%
Excess	4	9%
Normal	10	28%
Deficient	15	42%
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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