

Monsoon and Sowing: Positive changes seen

India's South-West monsoon has gathered momentum with higher rainfall at 5% (above LPA) till 23 Jul 2023. With this pickup, overall kharif sowing is also higher by 1.2% with rice acreage in green though pulses continue to register lower sowing compared with last year. Region wise, North West and Central Region have recorded higher rainfall, while Southern peninsula and Eastern region rainfall are in the deficient zone. A total of 8 subdivisions and 6 states, have received lower rainfall during this period (1 Jun-21 Jul 2023). Distribution of rainfall needs careful monitoring along with sowing of Kharif crops. Any shortage or excess might play a significant role on prospects of agriculture growth.

Where does Kharif sowing stand?

The overall kharif sown area has increased by 1.2% as of 21 Jul 2023, (-2% in the previous week) compared with last year. Acreage of rice picked up pace (2.7%) and is in surplus for the first time in this season. Led by improvement in sown area of Bajra (11.3%) and steady pick up in Jowar and maize, the overall sown area of coarse cereals (4.8%) has improved compared with last year. Steady improvement was also registered in the sown area of sugarcane and oilseeds. However, pulses sowing has declined by 9.8% led by Arhar (-18.4%) and Urad (-9.7%). Even cotton and Jute & Mesta has registered lower sowing this year.

Table 1: Kharif Sowing

	Area sown in 2023-24 (Lakh ha)	Area sown in 2022-23 (Lakh ha)	Change (YoY %)
Coarse Cereals	134.9	128.8	4.8
Jowar	10.1	9.7	3.6
Bajra	58.0	52.1	11.3
Maize	63.0	62.9	0.2
Rice	180.2	175.5	2.7
Pulses	85.9	95.2	(9.8)
Oilseeds	160.4	155.3	3.3
Cotton	109.7	110.0	(0.3)
Sugarcane	56.0	53.3	5.0
Jute and Mesta	6.4	6.9	(8.1)
All Crops	733.4	725.0	1.2

Source: CEIC, Bank of Baroda | Data as of 21 Jul 2023

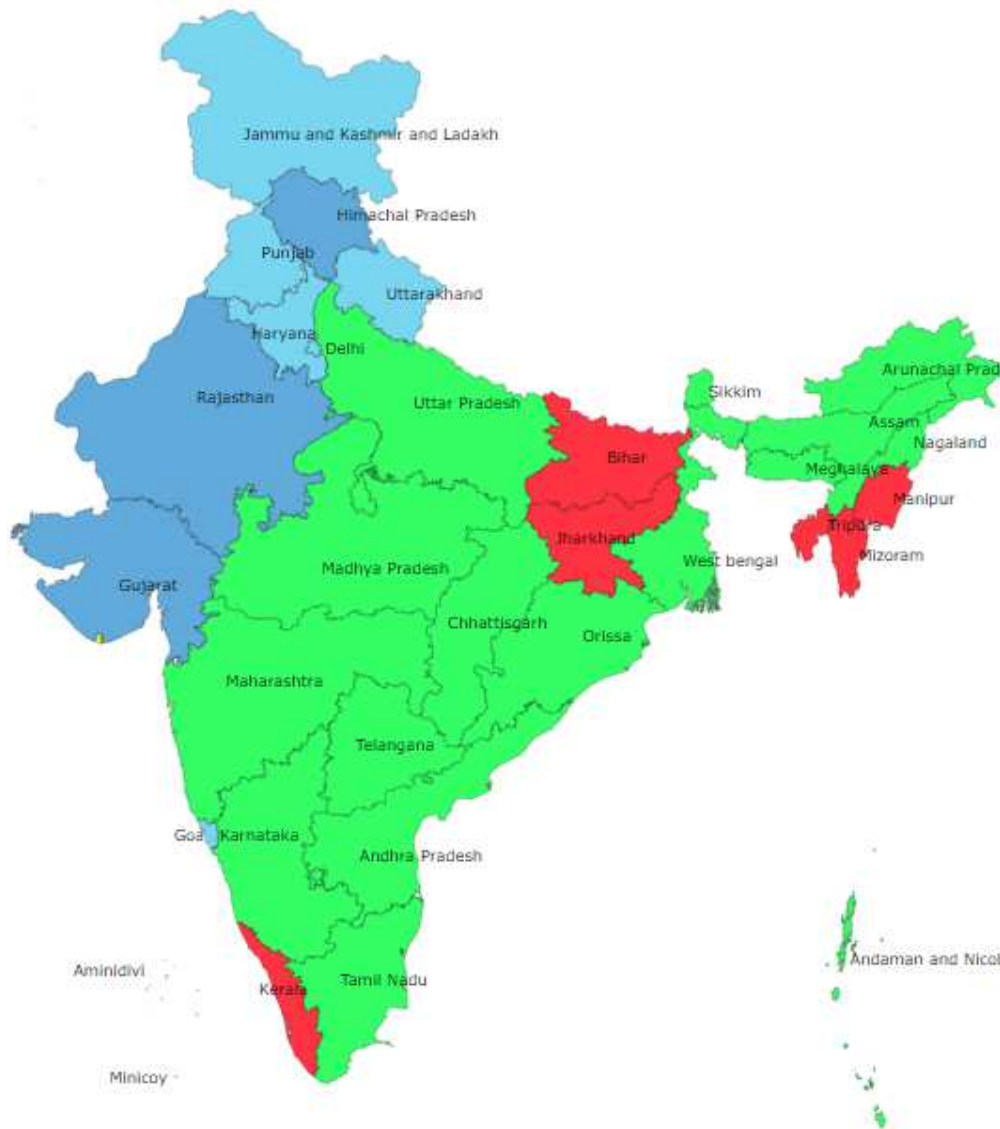
Monsoon:

For the period 1 Jun 2023 to 23 Jul 2023, South West Monsoon is 5% above LPA compared with last year.

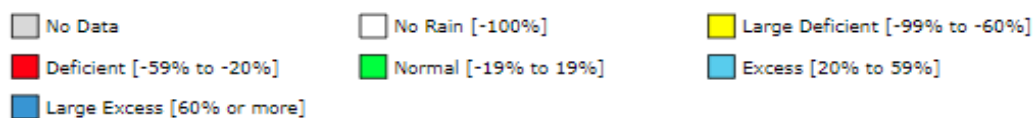
- A large part of the country is in in green receiving normal rainfall, including central and Southern region.

- States like Bihar, Jharkhand, Kerala, Tripura, along with Manipur and Mizoram have been witnessing scanty rainfall and are in deficient zones. On the other hand, Northern and Western part of the country has been receiving excess rainfall with the concerns of floods remaining prevalent in these regions.
- IMD has projected moderate to light with some likelihood of heavy rainfall in Northern region including Punjab, Chandigarh, Haryana, Uttar Pradesh and West Rajasthan. In the coming days, Central region is also projected to receive light to moderate rainfall, with isolated heavy rainfall in some areas.

Fig 1: Distribution pattern of South-West Monsoon



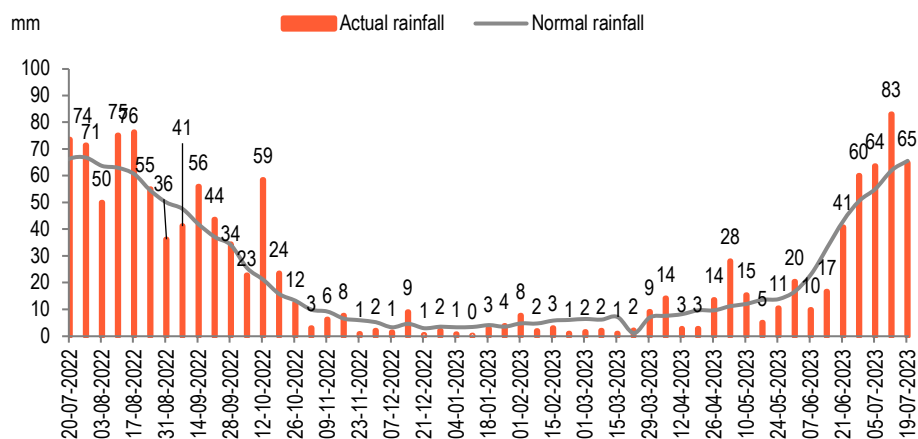
Source: IMD, Bank of Baroda Research | Period from 1 Jun-23 Jul 2023.



In Fig2, actual rainfall this year has been comparatively less than last year (65mm versus 74mm). It is almost on par with the normal rainfall. Fig 3, explains regions wise distribution of rainfall. North West

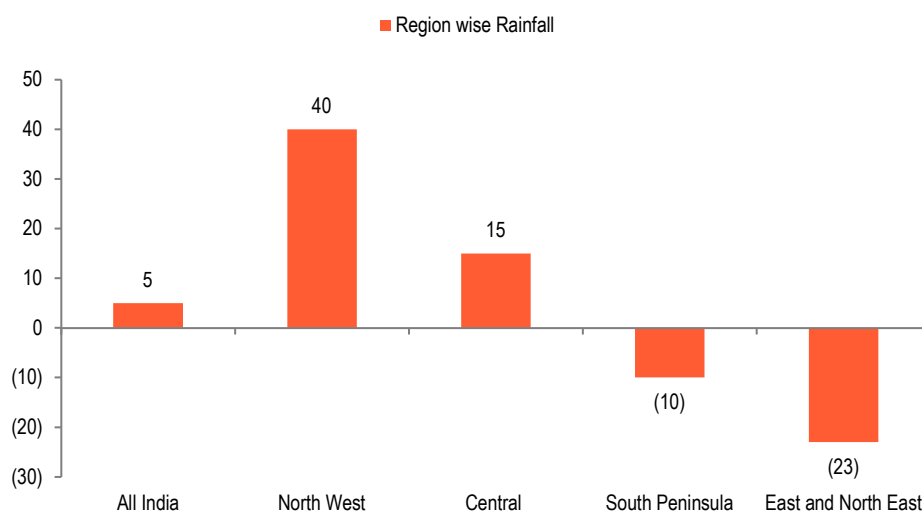
(52% above LPA) and Central (2% above LPA) region have registered much higher rainfall than the other regions. South Peninsula (21% below LPA) and Eastern (19% below LPA) have recorded deficient rainfall.

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 8 subdivision (out of 36) have received deficient rainfall (15 in the previous week) for cumulative period ranging from 1 Jun-23 Jul'23. Amongst states too, there are 6 states that have received lower rainfall during this period.

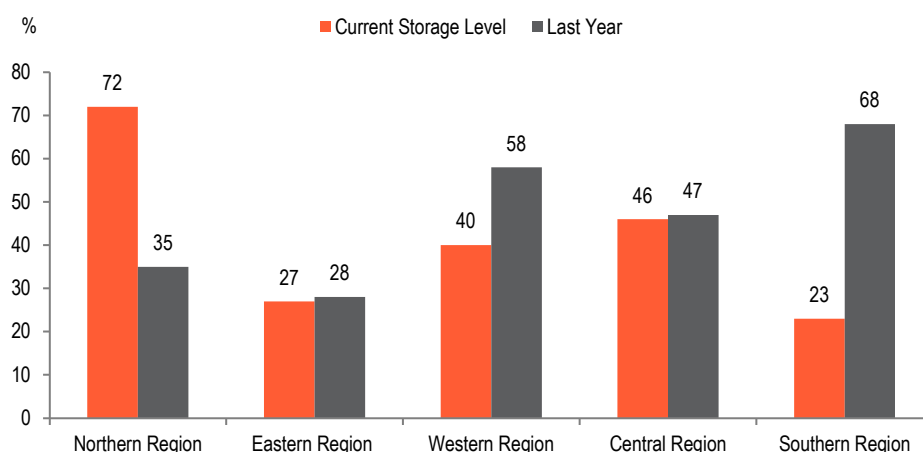
In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 39% as on 20 Jul 2023. Total live storage available in 146 reservoirs stands at 74% of storage of last year and 106% of average storage for last 10 years. Within regions, Northern region remains at top with highest reservoir levels (72% against 35% last year). Central (46% versus 47% last year) and Eastern region (27% versus 28%) have similar reservoir levels as last year. On the other hand, Western (40% versus 58%) and Southern region (23% against 68%) have lower reservoir level compared with last year.

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2023-23 Jul 2023)	No. of Subdivisions	Sub-divisiona % area of Country
Large Excess	3	11%
Excess	9	27%
Normal	16	42%
Deficient	8	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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For further details about this publication, please contact:

Economics Research Department
Bank of Baroda
chief.economist@bankofbaroda.com