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Monsoon and Sowing: Update

The cumulative rainfall activity for the country remains in deficit at 5% below LPA, as of 25 Sep 2023. The sowing levels has been down from the past year levels along with divergence seen across crops. Pulses sowing are down by 4.6% while rice sowing has advanced. The skewed distribution of rainfall is expected to affect crop yield and ultimately have some impact on inflation. Region wise, only North West region has been witnessing surplus rains, while other are still receiving deficient rainfall. Even in terms of reservoir levels, the overall storage is seen to lower than last year levels and is also seen to be lower than average storage of last 10-years and this might pose risk on rabi sowing.

Where does Kharif sowing stand?

Overall kharif sowing is higher/lower as of 22 Sep 2023 by 0.3% compared with last year. The sown area of coarse cereal has improved owing to higher sowing for Bajra (0.5%) and Maize (3.2%). Sown area of rice and sugarcane have advanced further by 2.7% and 7.6% respectively. However pulses acreage continue to lag behind, down by (-) 4.6% (-5.2% in the previous week) on the back of scanty rainfall with Arhar sowing down by (-) 5.1% and Urad sowing lower by (-) 1.6%. Moreover, sowing area under cultivation for cotton as well as Jute and Mesta crops has also declined by (-) 3.3% and (-) 5.6% respectively for the same period. Oilseeds sowing area has dropped by (-) 1.6% 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	186.1	183.7	1.3
Jowar	14.3	15.7	(9.1)
Bajra	70.9	70.6	0.5
Maize	84.7	82.0	3.2
Rice	411.5	400.7	2.7
Pulses	122.6	128.5	(4.6)
Oilseeds	192.9	196.1	(1.6)
Cotton	123.4	127.6	(3.3)
Sugarcane	59.9	55.7	7.6
Jute and Mesta	6.6	7.0	(5.6)
All Crops	1103.0	1099.2	0.3

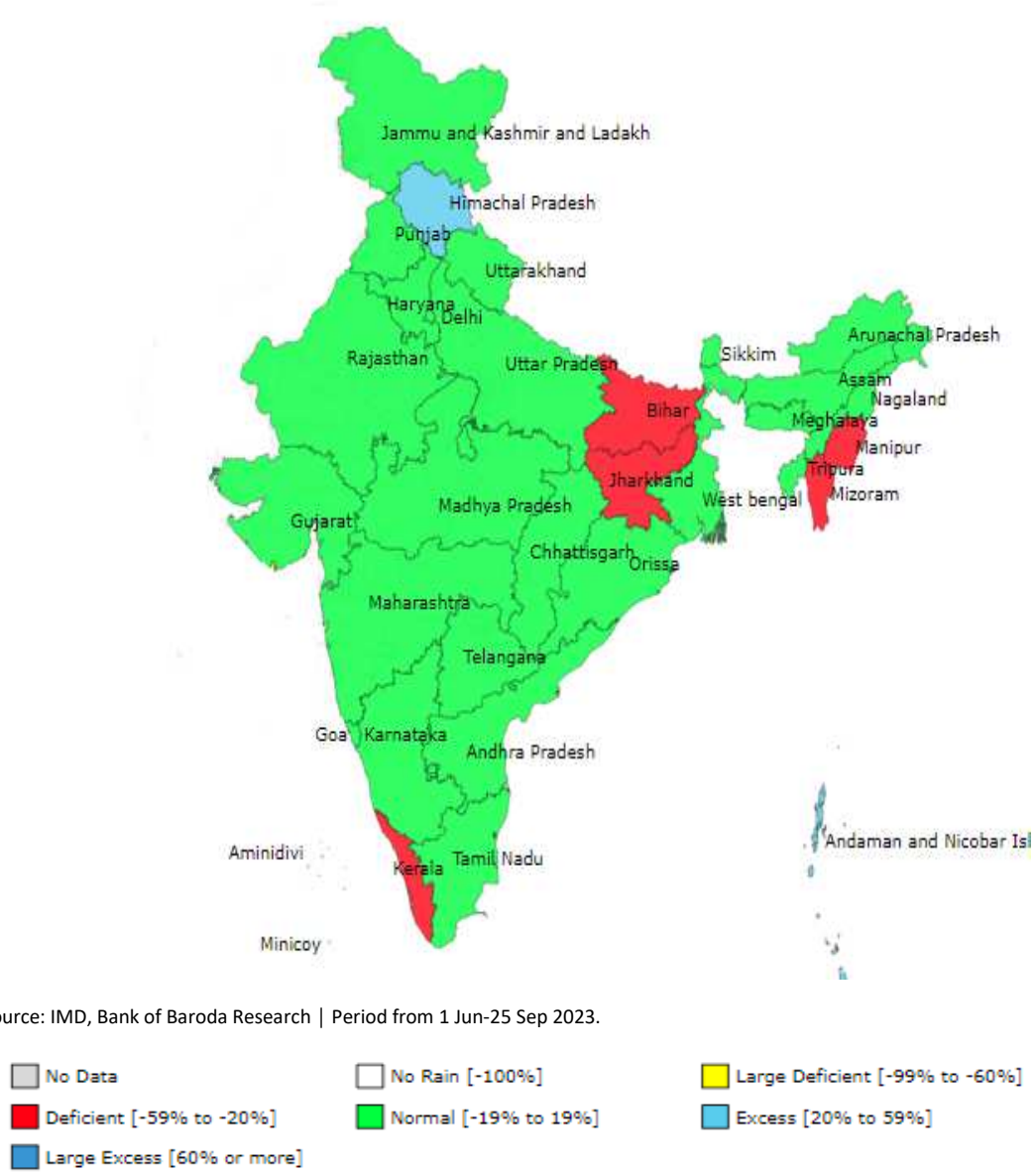
Source: CEIC, Bank of Baroda | Data as of 22 Sep 2023

Monsoon:

For the period 1 Jun 2023 to 25 Sep 2023, South West Monsoon is 5% below LPA compared with last year.

- After receiving normal rainfall in most of the states across country, certain states such as Manipur, Mizoram, Tripura, Kerala, Bihar and Jharkhand have received deficient rainfall.
- Himachal Pradesh in the only state to receive excess rainfall during this period.
- IMD has noted that currently weak El Nino conditions over the equatorial Pacific region are prevailing which is expected to intensify in the later part of the year. Moreover, positive IOD conditions are likely to strengthen in the coming months. Furthermore, IMD has noted the beginning of the withdrawal of South West Monsoon has begun.

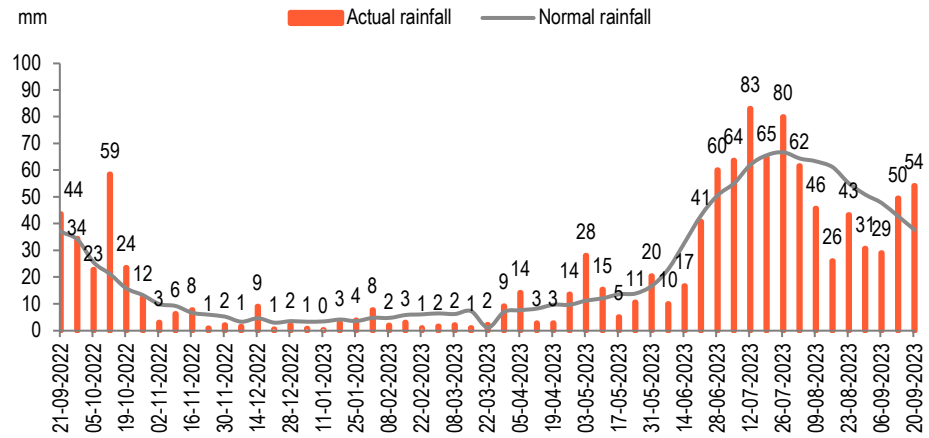
Fig 1: Distribution pattern of South-West Monsoon



Source: IMD, Bank of Baroda Research | Period from 1 Jun-25 Sep 2023.

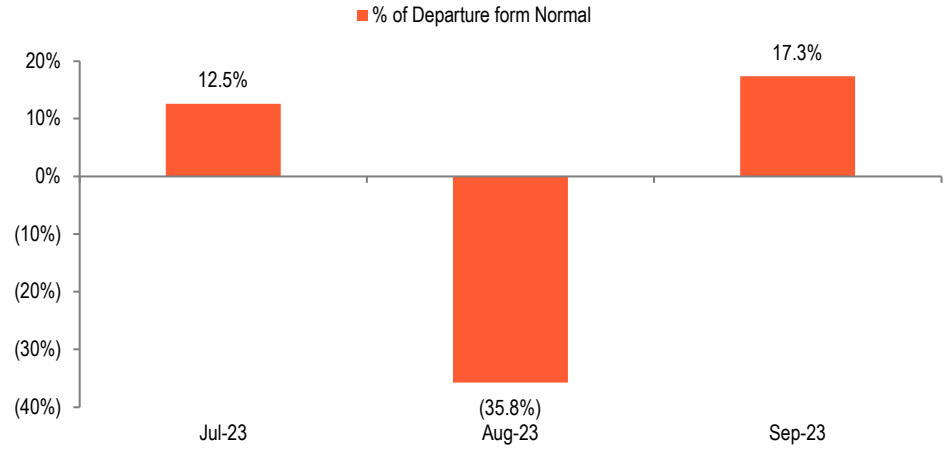
In Fig2, actual rainfall this year has turned out to be comparatively higher than last year (54mm versus 44mm). It is even higher than the normal rainfall (49.5mm). Rainfall in Sep'23 (As of 24 Sep) is in surplus compared with deficient rainfall back in Aug'23 and much higher rainfall in Jul'23 as has been seen in Fig 3. Fig 4, explains regions wise distribution of rainfall. Except, North West regions, all the other regions have been on the receiving scanty rainfall. East and North East (17% below LPA), South Peninsula (9% below LPA) and Central region have been struggling with lower rainfall.

Fig 2: Weekly distribution of rainfall



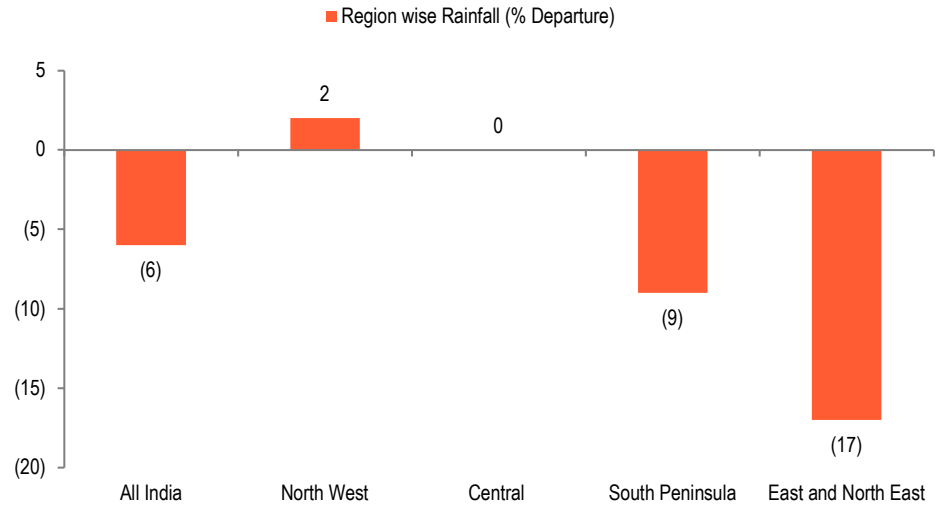
Source: CEIC, Bank of Baroda

Fig 3: Departure from Normal Rainfall



Source: CEIC, Bank of Baroda Note: For Sep'23-data as of 24 Sep

Fig 4: Region-wise deviation of rainfall



Source: CEIC, Bank of Baroda

In the table 2, mentioned below, for cumulative period ranging from 1 Jun-24 Sep'23, out of 36 subdivisions, 7 have received lower rainfall (10 subdivisions-last week). During the same period, there are 5 states (6 states last week) that are in the deficient zone.

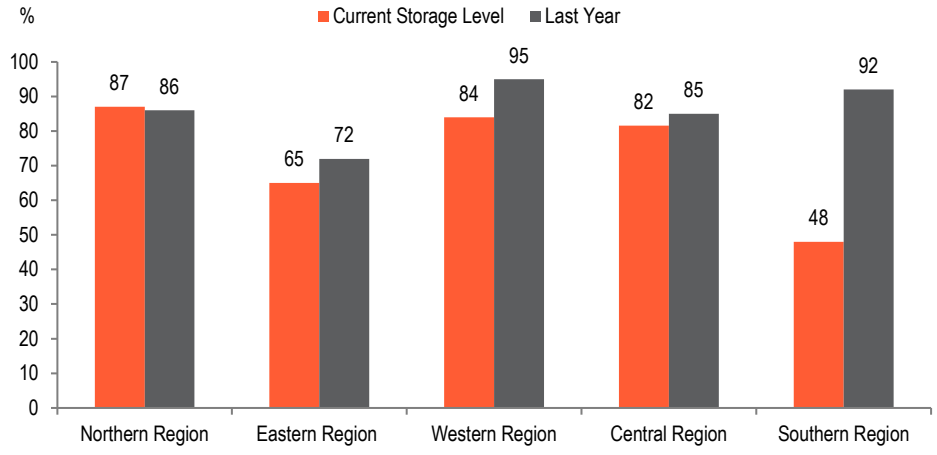
In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 71% as on 21 Sep 2023 compared with 88% for the last season. Total live storage available in 150 reservoirs stands at 81% of storage of last year and 92% of average storage for last 10 years. Region wise, the reservoir levels this year has been far lower than last year levels, Northern region (87% versus 86% last year), Central (82% versus 85% last year), Western (84% versus 95%) and Eastern region (65% versus 72%) and Southern region (48% against 92%).

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2023-25 Sep 2023)	No. of Subdivisions	Sub-division % area of Country
Large Excess	0	0%
Excess	4	11%
Normal	25	71%
Deficient	7	18%
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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