

Monsoon and Sowing: Update

Cumulative rainfall for the country has slipped in to the deficient zone at 11% below LPA. The prevailing El Nino conditions has resulted in uneven distribution of rains with frequent breaks as was largely visible in the month of Aug'23. These conditions are expected to intensify further from moderate to strong given the warming up of the tropical pacific, reflected through the SST (Sea Surface Temperature) anomaly. The kharif sowing has been up a tad bit from last year due to erratic rains and patchy distribution of rainfall across different regions. This in turn might translate in to higher inflation in the coming months. Notably, IMD expects a normal monsoon in Sep'23 and a positive Indian Ocean Dipole (IOD) which holds a chance of possible recovery in the ongoing month.

Where does Kharif sowing stand?

The total kharif sowing as of 1 Sep 2023 has improved by 0.4% (0.3% in the previous week) compared with last year. Acreage of rice has grown further by 3.7% from last year. Coarse cereals sowing has advanced further led by higher sowing in Bajra (0.6%) and Maize (2.7%). Sugarcane sowing has registered a sharp acceleration from last year. However, pulses sowing continue to lag behind (-8.5%) and were dragged down by sowing levels dipping down for Arhar (-5.8%) and Urad (-13.6%). Cotton sown area too continue to fall behind last year levels. Sowing area of oilseeds and Jute & Mesta have declined by (-) 0.9% and (-) 5.7% respectively compared with last year.

Table 1: Kharif Sowing

	Area sown in 2023-24 (Lakh ha)	Area sown in 2022-23 (Lakh ha)	Change (YoY %)
Coarse Cereals	181.1	179.1	1.1
Jowar	14.1	15.6	(9.7)
Bajra	70.8	70.4	0.6
Maize	82.8	80.6	2.7
Rice	398.1	383.8	3.7
Pulses	119.1	130.1	(8.5)
Oilseeds	190.1	191.9	(0.9)
Cotton	123	125.6	(2.1)
Sugarcane	59.9	55.7	7.6
Jute and Mesta	6.6	7.0	(5.7)
All Crops	1077.8	1073.2	0.4

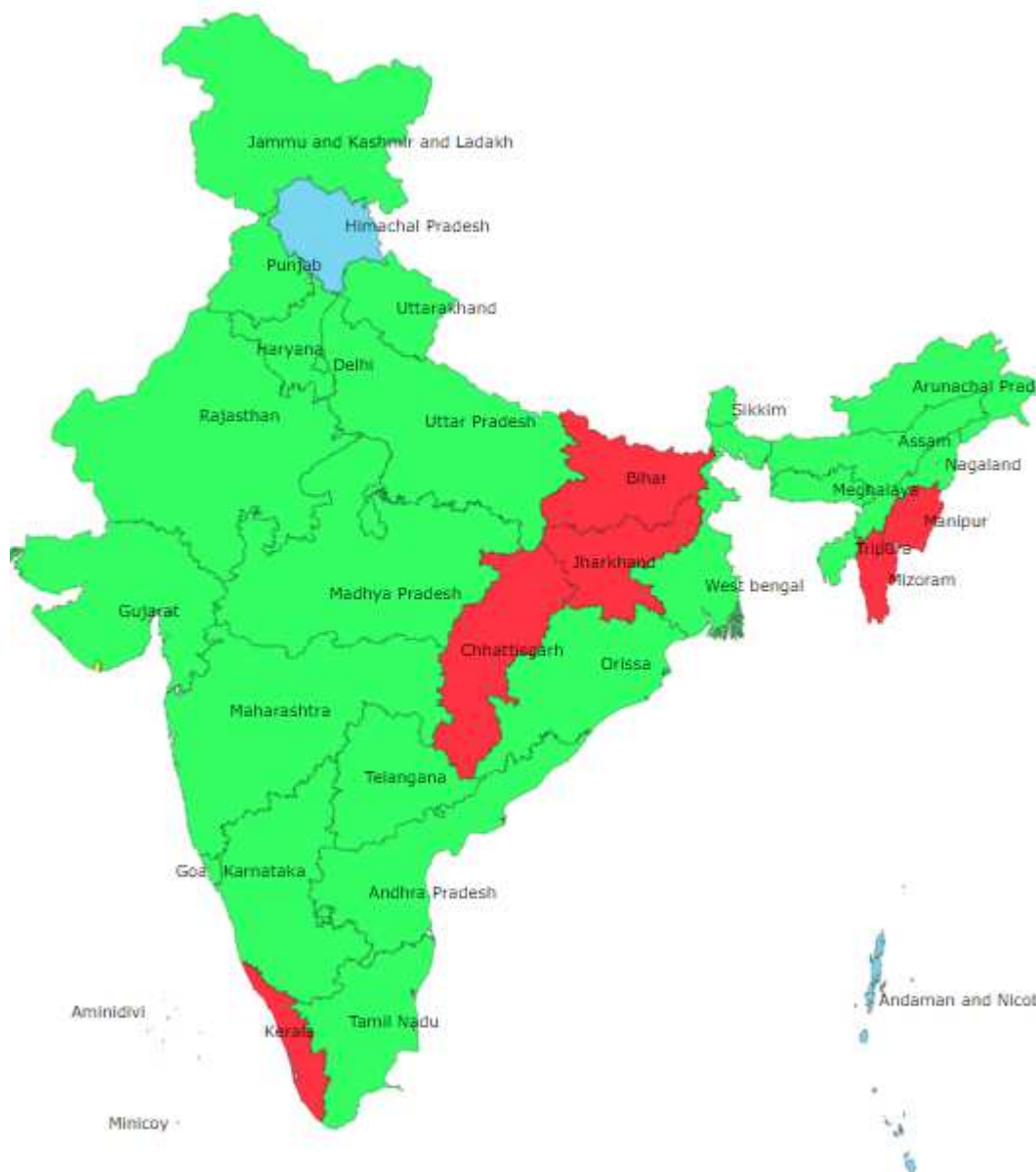
Source: CEIC, Bank of Baroda | Data as of 1 Sep 2023

Monsoon:

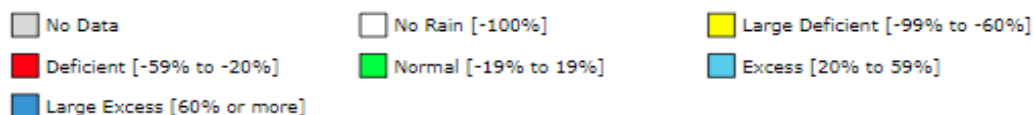
For the period 1 Jun 2023 to 4 Sep 2023, South West Monsoon is 11% below LPA compared with last year.

- Even as most of the states have received normal rainfall. Regions in the Eastern belt including Bihar, Jharkhand, and Chhattisgarh have received deficient rainfall. Additionally, states such as Kerala and some states in North East (Manipur, Tripura and Mizoram) too have been witnessing lower rainfall for the same period.
- Himachal Pradesh continue to witness extremely heavy rainfall. Other parts of the country have received normal rainfall.
- According to IMD, monsoon trough was highly unfavorable in Aug'23. There was also an absence of formation of Off-shore trough which resulted in subdued rainfall over the West coast of the country and over Gujarat.

Fig 1: Distribution pattern of South-West Monsoon

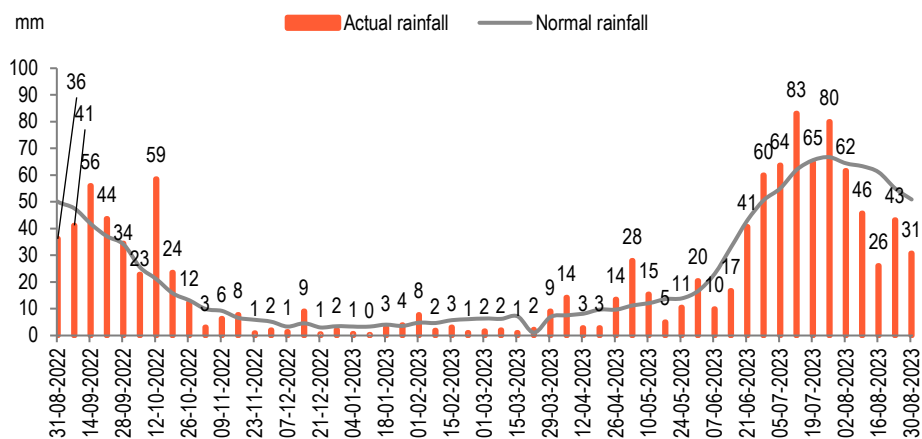


Source: IMD, Bank of Baroda Research | Period from 1 Jun-4 Sep 2023.



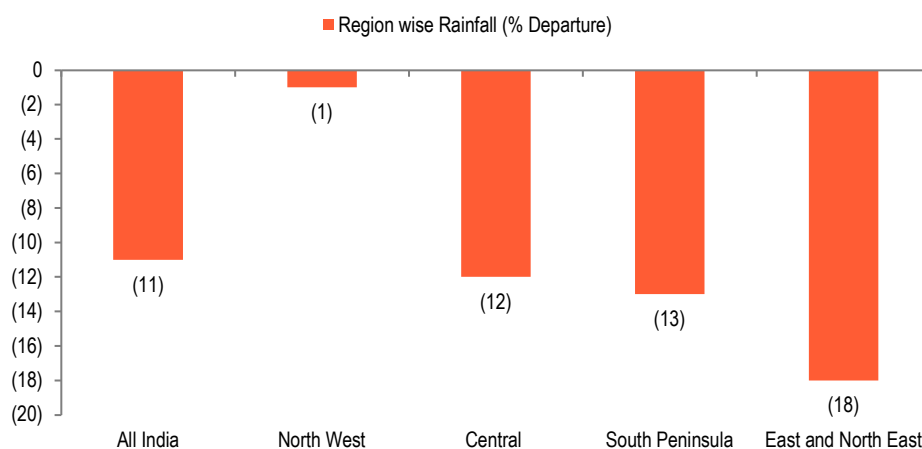
In Fig2, actual rainfall this year continues to be comparatively less than last year (31mm versus 36mm). It also is far lower than the normal rainfall (50.9mm). Fig 3, explains regions wise distribution of rainfall. All the regions have been on the receiving end of the deficient rainfall. East and North East (18% below LPA), South Peninsula (14% below LPA) Central (12% below LPA) and North West (15% below LPA) region have been struggling with less 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, for cumulative period ranging from 1 Jun-3 Sep'23, over 12 subdivision (out of 36) have received lower rainfall, tad higher than 10 subdivisions in the last week. During the same period, there are 7 states (same as last week) that are in the deficient zone.

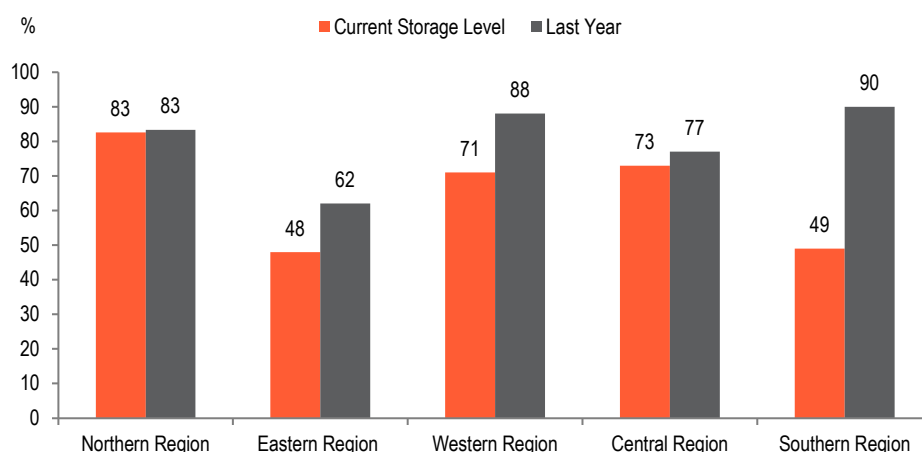
In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 63% as on 31 Aug 2023 compared with 82% for the last season. Total live storage available in 150 reservoirs stands at 77% of storage of last year and 91% of average storage for last 10 years. Region wise, it's only the Northern region that has registered highest reservoir levels (83%). Other regions such as Central (73% versus 77% last year), Western (71% versus 88%) along with Eastern region (48% versus 62%) and Southern region (49% against 90%) have lower reservoir level this year compared with last year.

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2023-4 Sep 2023)	No. of Subdivisions	Sub-division % area of Country
Large Excess	0	0%
Excess	4	11%
Normal	20	56%
Deficient	12	33%
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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