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Jahnavi Prabhakar
Economist

Monsoon and Sowing: Update

All India cumulative seasonal rainfall is 5% above LPA as of 4 Aug2023. The distribution of rainfall has pushed kharif sowing higher compared with last year. Sown area of rice, sugarcane and oilseeds have registered an improvement. Pulses sowing continue to lag, though there still has been some improvement since last week. In hindsight, as major part of pulses sowing has already been completed, we do not expect sowing levels to be higher than last year. On distribution of rainfall, region wise, Southern Peninsula and Eastern region have recorded lower rainfall and are in the deficient zone during this period. North West and Central region continue to register surplus rainfall.

Where does Kharif sowing stand?

Total Kharif sowing area has improved by 0.4% (was lower by 0.3% in the previous week) as of 4 Aug 2023 since last year. Sown area of rice has improved considerably, up by 3.4% (1.9% last week). Sown area of coarse cereals edged up by 1.1% led by improvement in both Bajra and Maize sowing. Sugarcane and Oilseeds continue to record higher sowing during this period, both were up by 2.5% each for the same period. On the other hand, Pulses sowing has declined by (-) 9.3%, however it has improved since last week (-11.3%). Arhar and Urad sowing was down by (-) 7.9% and (-) 13.8% respectively. Jute & Mesta (-5.6%) and Cotton (-1.4%) crops continue to register lower sowing than last year.

Table 1: Kharif Sowing

	Area sown in 2023-24 (Lakh ha)	Area sown in 2022-23 (Lakh ha)	Change (YoY %)
Coarse Cereals	164.2	162.43	1.1
Jowar	12.8	13.7	(6.6)
Bajra	66.6	66	0.9
Maize	76.1	75.4	0.9
Rice	283.0	273.7	3.4
Pulses	106.9	117.9	(9.3)
Oilseeds	179.6	175.1	2.5
Cotton	119.2	120.9	(1.4)
Sugarcane	56.1	54.7	2.5
Jute and Mesta	6.6	6.9	(5.6)
All Crops	915.5	911.7	0.4

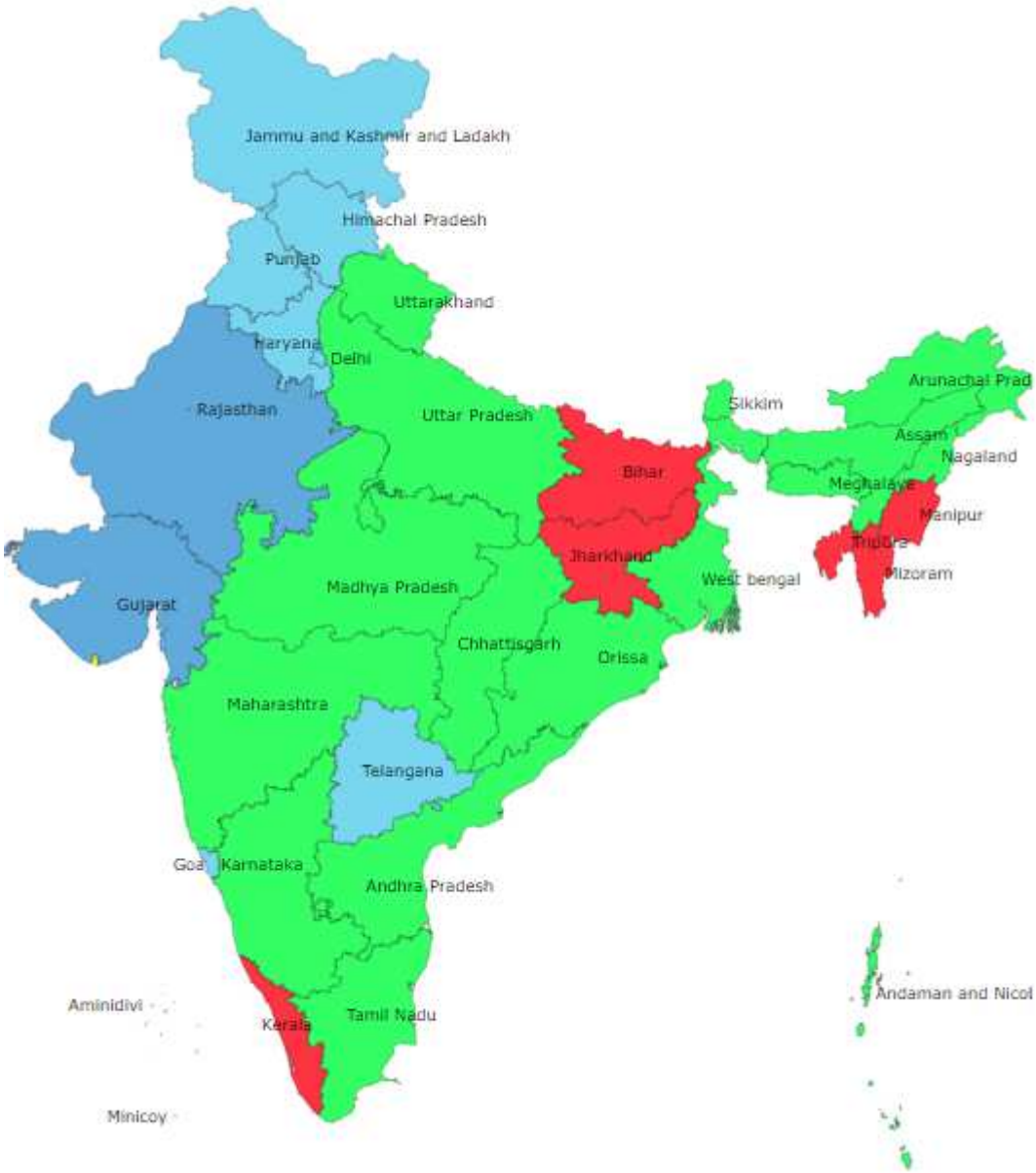
Source: CEIC, Bank of Baroda | Data as of 4 Aug 2023

Monsoon:

For the period 1 Jun 2023 to 4 Aug 2023, South West Monsoon is 5% above LPA compared with last year.

- Central region and large part of Deccan plateau (excl Kerala) have received normal to excess rainfall. States in Northern region including Jammu and Kashmir, Himachal Pradesh and Punjab have recorded excess rainfall. Western region states notably, Gujarat, Rajasthan too have recorded higher rainfall.
- On the other hand, parts of eastern region such as Bihar, Jharkhand and in some North Eastern states including Manipur, Mizoram and Tripura have been in the deficient zone.
- IMD has projected overall rainfall activity will remain normal to above normal for North East and East Central as well as Western region. However, rainfall is expected to be below normal for Southern Peninsula and North West region in the upcoming week.
- Additionally, El Nino conditions remain weak over the equatorial Pacific region. The Indian Ocean Dipole (IOD) conditions are also currently weak over the Indian Ocean and are expected to turn positive for the remaining part of the monsoon.

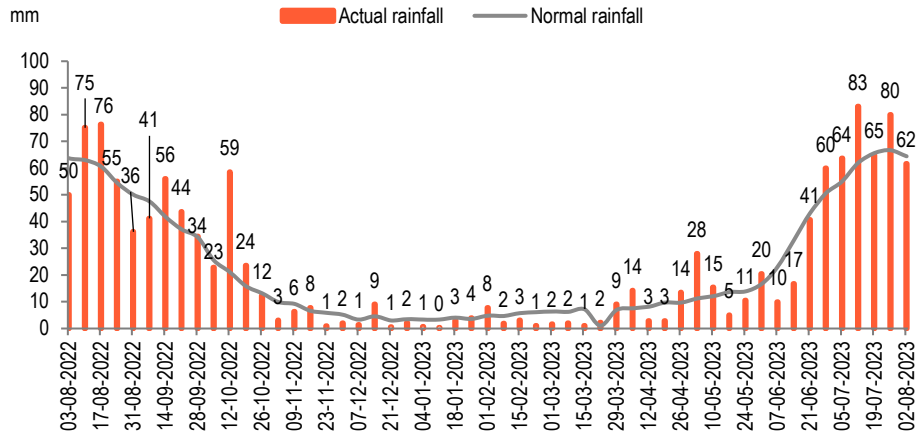
Fig 1: Distribution pattern of South-West Monsoon



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

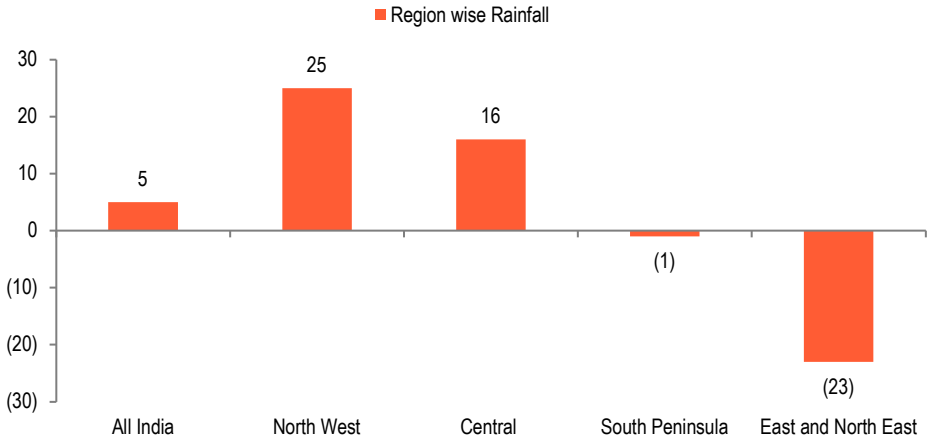
In Fig2, actual rainfall this year has been comparatively more than last year (62mm versus 50mm). However, it is lower than the normal rainfall. Fig 3, explains regions wise distribution of rainfall. East and North eastern region (23% below LPA) continue to receive deficient rainfall. Southern Peninsula (1% below LPA) too has received much lower rainfall for the same period. On the other hand, North West (25% above LPA) and central Region (16% above LPA) have received much higher 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 7 subdivision (out of 36) have received lower rainfall (6 in the previous week) for cumulative period ranging from 1 Jun-4 Aug'23. Amongst states, there are 7 states that remain in the deficient zone during this period.

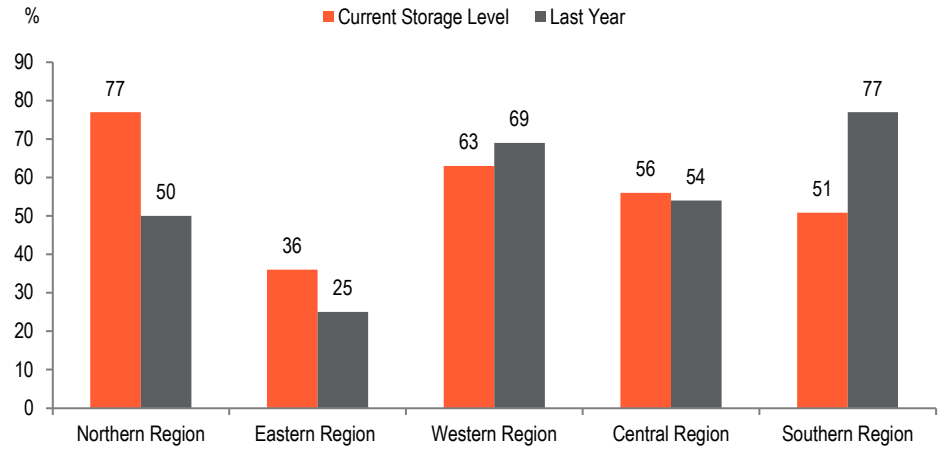
In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 56% as on 3 Aug 2023 compared with 60% for the last season. Total live storage available in 146 reservoirs stands at 93% of storage of last year and 113% of average storage for last 10 years. Within regions, Northern region continues to have the highest reservoir levels (77% against 50% last year) and Central (56% versus 54% last year) and Eastern region (36% versus 25%). On the other hand, Western (63% versus 69%) and Southern region (51% against 77%) have lower reservoir level compared with last year.

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2023-4 Aug 2023)	No. of Subdivisions	Sub-division % area of Country
Large Excess	2	9%
Excess	9	26%
Normal	18	50%
Deficient	7	15%
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