

Rabi Sowing: Update

A delayed start to the rabi sowing this year due to erratic rainfall has raised concerns around agriculture growth in H2FY24. Rabi acreage continues to be lower compared with last year on the back of broad based dip across all the crops. Pulses, wheat and oilseeds sown area have all been in red. So far, 68% of the normal area has been covered with a pick up expected in the month of Dec'23. The government had raised the MSP for wheat by 7% (highest since 2014). Additionally, storage levels remain lower at 65% compared with 83% in the last season and is also lower to average of last 10-years, thereby needs to be monitored on a regular basis.

Where does Rabi sowing stand?

- Overall sown area of Rabi crops have declined by 5.3% compared with last year as of 1st Dec 2023.
- Total sown area of wheat (4.9%) and rice (13.3%) have dropped significantly.
- Sown area of coarse cereals is down by (-) 4.2% led by lower acreage of Jowar (8.1%). Pulses too have registered lower sowing for this period and has largely been dragged down by gram (-12.2%).
- Even the sown area of oilseeds (-0.4%) have fallen with mustard registering much lower acreage.

A delayed start to the sowing season for Rabi crops due to late harvest of kharif crops, has translated in lower acreage for Rabi. Pronounced impact of El Nino, also added to the delay. However, sowing is expected to pick up in the coming months.

Table 1: Rabi Sowing

	Area sown in 2023-24 (Lakh ha)	Area sown in 2022-23 (Lakh ha)	Change (YoY %)
Wheat	187.94	197.59	(4.9)
Rice	9.28	10.7	(13.3)
Coarse Cereals	39.93	41.68	(4.2)
Jowar	16.74	18.21	(8.1)
Maize	14.55	14.27	2.0
Pulses	108.09	119.37	(9.4)
Oilseeds	89.49	89.88	(0.4)
All Crops	434.72	459.22	(5.3)

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

Sowing of crops across State: status

A total of 68% of that total normal area has been covered through sowing so far. For all the crops, it has been noticed that the following states have been lagging (Fig 1) relative to sowing compared with last year: Haryana, Karnataka, Maharashtra, and Rajasthan. However, it is interesting to note states like Uttar Pradesh and Madhya Pradesh have been clocking higher sowing than last year and needs further monitoring.

Figure 2: Sown area in the last 2-years

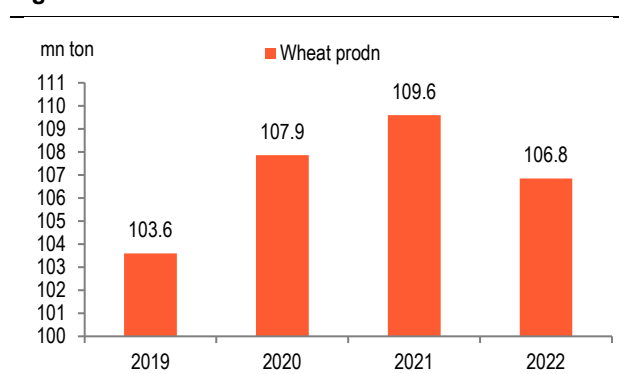
	Area sown in 2022 (Lakh ha)	Area sown in 2023 (Lakh ha)
Andhra Pradesh	5.06	3.74
Arunachal Pradesh	0.20	0.21
Assam	2.76	2.78
Bihar	6.68	1.63
Chhattisgarh	6.69	5.11
Gujarat	14.71	10.47
Haryana	24.37	23.57
Himachal Pradesh	3.30	2.95
Jammu & Kashmir	2.23	1.96
Jharkhand	1.78	3.97
Karnataka	21.86	16.58
Kerala	0.25	0.57
Madhya Pradesh	83.81	88.68
Maharashtra	35.67	30.07
Nagaland	0.32	0.31
Odisha	6.61	4.90
Punjab	33.23	33.43
Rajasthan	85.26	75.53
Sikkim	0.01	0.01
Tamil Nadu	16.51	14.16
Telangana	5.67	5.96
Uttar Pradesh	86.99	94.79
Uttarakhand	5.91	5.52
West Bengal	8.44	7.65
Others	0.12	0.10
Total	458.6	434.7

Source: Ministry of Agriculture, Bank of Baroda

Production of Rabi crops

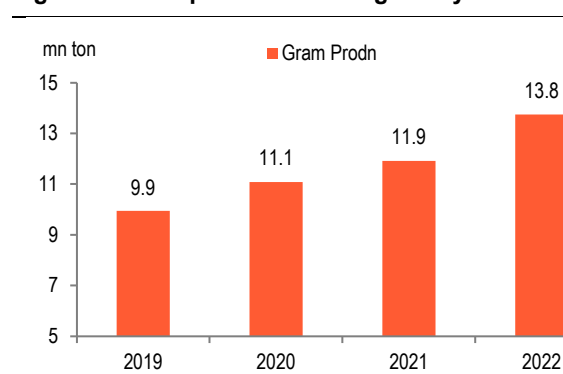
Production for rabi crops over the years have been highlighted in the Fig 2-5 below. Until last year (2022), barring wheat all the other crops have registered an improvement at a steady pace. With lower rabi sowing, there is a possibility of lower production of rabi crops this year and needs to be monitored carefully, as this will impact agriculture growth in Q4FY24.

Figure 2: Production of wheat



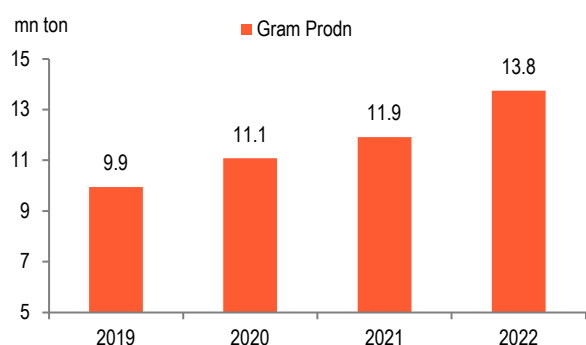
Source: CEIC, Bank of Baroda

Figure 2: Gram production through the years



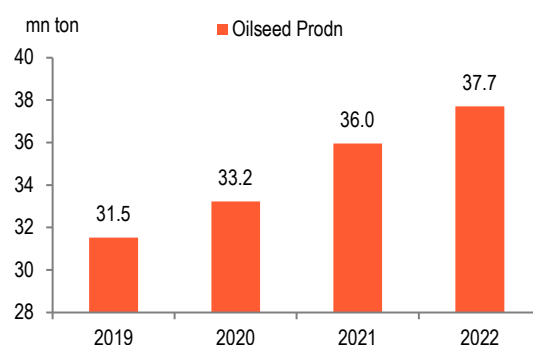
Source: CEIC, Bank of Baroda

Figure 3: Gram production over the years



Source: CEIC, Bank of Baroda

Figure 4: Production of oilseeds



Source: CEIC, Bank of Baroda

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