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Monsoon and Sowing: Update

Despite the advancement of South West monsoon couple of days early across the country, rainfall still remains 2% below the LPA till 15 Jul 2024. The slowdown is more recent. Second week of July recorded 42.7mm rainfall, while the first week of July noted 79.1mm rainfall, following 137.5mm rainfall in Jun'24. Out of 36, 25 sub-divisions (69% of the country) have received normal or above normal rainfall during this period and 12 states are in the deficient zone. Region-wise, Central India reported small deviation from LPA (-4%), while South Peninsula has reported large excess in rainfall (+13%). Due to only marginal deviation in rainfall from LPA, there is an improvement noted in the sown area, with higher acreage of paddy, pulses and oilseeds, compared with last year. As majority of sowing occurs during the July and August period, rainfall distribution in the coming weeks will be critical for the agriculture sector.

Where does Kharif sowing stand?

As of 15th Jul 2024, overall sown area has improved by 10.3% compared with last year. Total sown area of rice (20.7%), pulses (26%) and oilseeds (22%) has risen notably. Within pulses, steep rise in acreage of Arhar has led to increase in the headline number. Apart from this, acreage of Urdbean (9%) was also up. In contrast, moong bean and other pulses have recorded notable decline so far. In case of oilseeds, sown area of soybean (31%) has jumped, while that of groundnut (-0.2%) has come down marginally. Amongst other major sub-heads, sown area of coarse cereals (-7%) and jute (-6.5%) has come down. Within cereals, sowing area of crops such as Bajra (-43.5%) and Jowar (-14.5%) has declined the most, while it has increased in case of Small Millets, Maize and Ragi. Sown area of cotton and sugarcane has also noted an increase.

Table 1: Kharif Sowing

	Area sown in 2023-24 (lakh ha)	Area sown in 2024- 25 (Lakh ha)	Growth (YoY %)
Coarse Cereals	105.0	97.6	(7.0)
Paddy	95.8	115.6	20.7
Pulses	49.5	62.3	26.0
Oilseeds	115.1	140.4	22.0
Cotton	93.0	95.8	3.0
Sugarcane	56.9	57.7	1.4
Jute and Mesta	6.0	5.6	(6.5)
All Crops	521.3	575.1	10.3

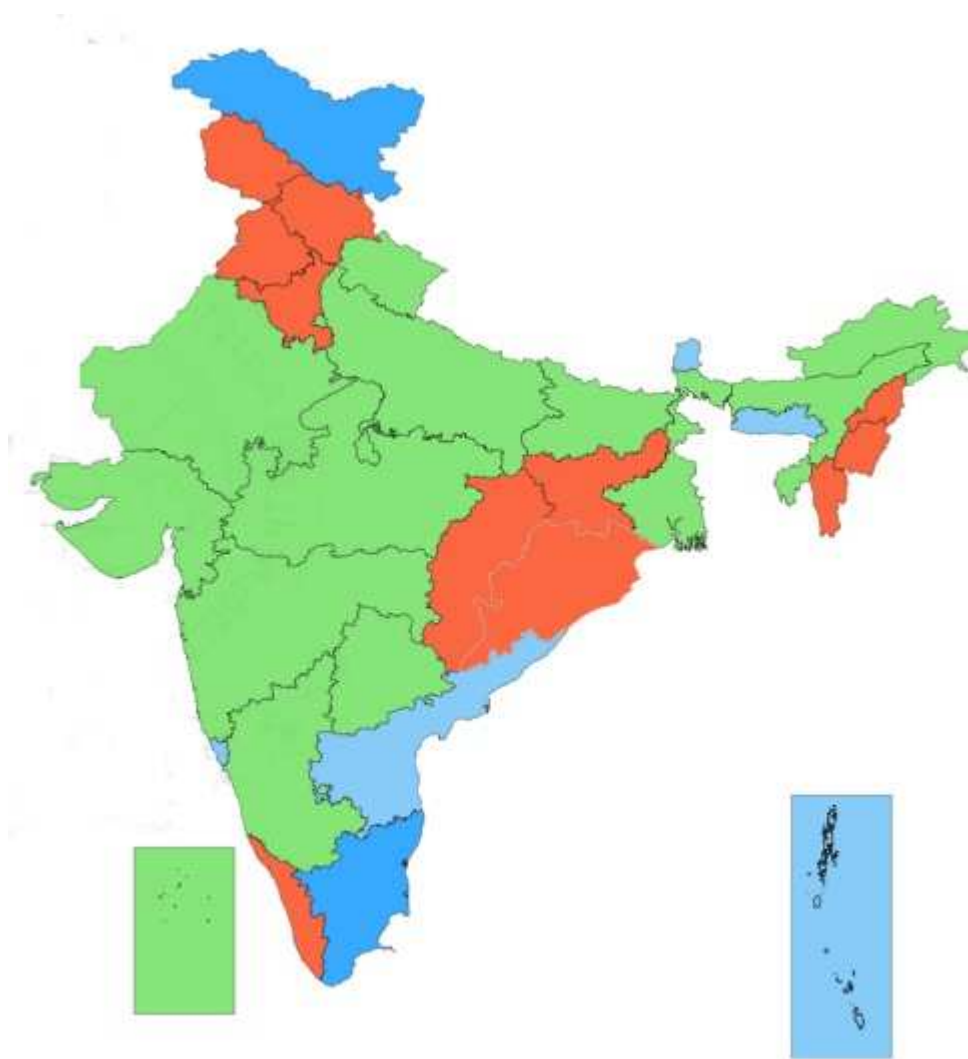
Source: CEIC, Bank of Baroda | Data as of 15 Jul 2024

Monsoon:

For the period 1 Jun 2024 to 15 Jul 2024, South West Monsoon is 2% below LPA compared with last year.

- Most part of the country, specifically, Central, Western and North-Eastern regions have received normal rainfall so far. These include states like Gujarat, Rajasthan, Madhya Pradesh, Uttar Pradesh, Arunachal Pradesh and Assam.
- Tamil Nadu and Ladakh have reported large excess of rainfall so far.
- Andhra Pradesh, Sikkim, Meghalaya, and Goa also reported excess rainfall.
- In contrast, Kerala, Odisha, Chhattisgarh, Jharkhand, Haryana, Punjab, Himachal Pradesh and J&K have noted deficient rainfall till 15 Jul 2024.

Fig 1: Distribution pattern of South-West Monsoon

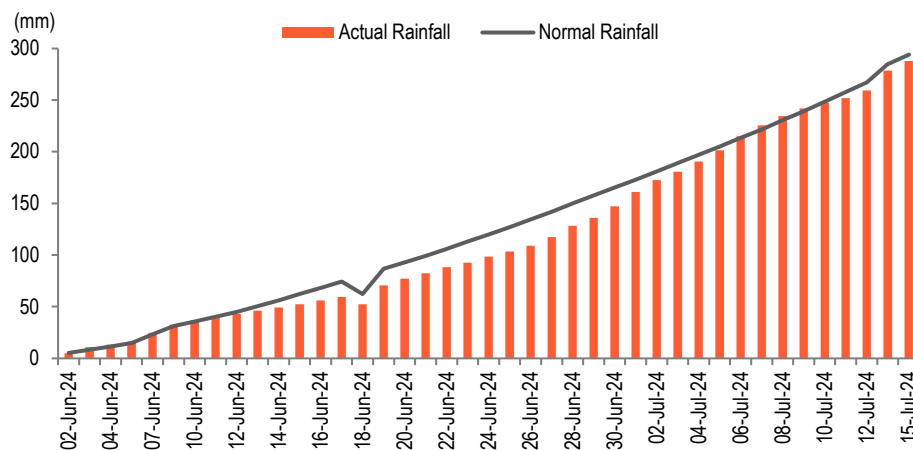


Source: IMD, Bank of Baroda Research | Period from 1 Jun-15 Jul 2024

■ No Data ■ No Rain ■ Unlisted ■ Large Deficient [-99% to -60%] ■ Deficient [-59% to -20%]
■ Normal [-19% to 19%] ■ Excess [20% to 59%] ■ Large Excess [60% or more]

Overall cumulative rainfall this year remains marginally on the lower side so far at 287.7mm, compared with 293.5mm last year. It is also slightly lower than the normal rainfall (294.2mm) received during this period.

Fig 2: Cumulative Distribution of rainfall



Source: CEIC, Bank of Baroda

Table 2 shows, 25 subdivision, which account for 69% of the total area, have received normal or above rainfall for cumulative period ranging from 1 Jun-15 Jul'24 and 11 sub-divisions have received deficient rainfall. Amongst states, there are 12 states that have received deficient rainfall during this period.

Table 2: Subdivision wise distribution of Rainfall

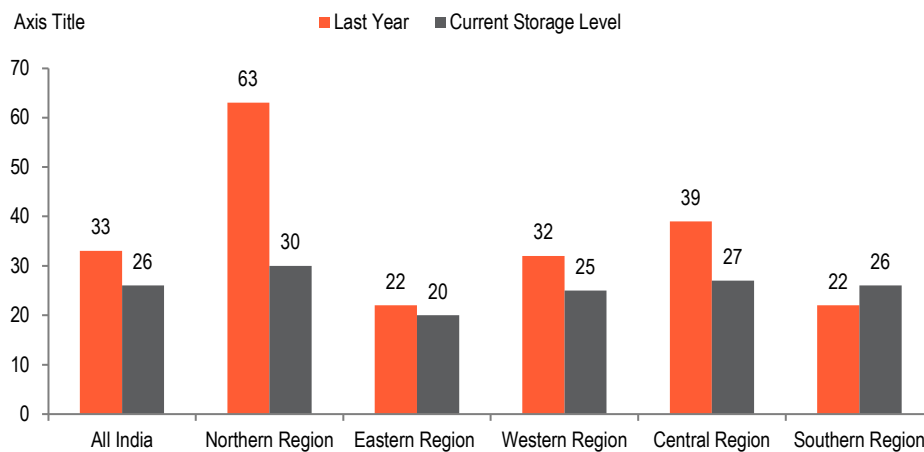
Period (1 Jun 2024-15 Jul 2024)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	3	7
Excess	4	7
Normal	18	55
Deficient	11	31
Large Deficient	0	0
No Rain	0	0

Source: IMD, Bank of Baroda

Reservoir storage status:

In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 26% as on 11 Jul 2024 (33% last year). Reservoir levels are much lower this year when compared with last year, across all the regions, with the exception of Southern region (26%). Amongst regions, Northern region continue to have the highest reservoir level (30%), followed by Central (27%), Western (25%), Eastern region (20%). In graph please change order first last year and then current year.

Fig 3: Reservoir level across regions



Source: Central Water Commission, Bank of Baroda

Key points to note:

- Cumulatively (1 Jun-15 Jul 2024), India has received 287.7mm rainfall, which is slightly lower than normal (294.2) and 293.5mm recorded last year during the same period.
- This implies South-west monsoon is 2% below LPA compared to last year.
- Acreage of paddy, pulses and oilseeds have seen an improvement (YoY basis) till 15 Jul 2024.
- Water reservoir levels remain lower than last year, with All India reservoir at 26% of the total storage capacity versus 33% last year during the same period.

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