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Monsoon and Sowing: Update

The first fortnight of South West monsoon began, at a much slower pace than anticipated resulting in below normal rainfall at 31% below LPA till 15 Jun 2025. This has resulted in lower sown area of kharif crops compared with last year. Despite this, some improvement has been seen in acreage of rice and pulses. Out of 36, 22 sub-divisions (58% of the country) have received deficient rainfall during this period and 23 states are in the deficient zone. Region-wise, a broad based deviation has been noted across all the regions. East and North eastern India reported deficient rainfall (-39%), followed by central (-34%) and North Western region (-38%) while South Peninsula has reported related smaller deviation (-11%). The hold of South west monsoon is expected to strengthen in the coming days with advancement likely in the Northwestern region, providing a major respite from the ongoing heatwave.

Where does Kharif sowing stand?

As of 6th Jun 2025, overall sown area has fallen by 1.1% compared with last year. Total sown area of coarse cereals (31.7%) has been lower amidst the dip in the acreage for maize. Sown area for sugarcane along with Jute and Mesta has also declined compared with last year level. On the other hand, sown area for rice has registered modest gains. Acreage of pulses have also registered an improvement, with pick up noted in both urad and moong. Higher acreage has also been noted for oilseeds for the same period led by sesamum and soybean.

Table 1: Kharif Sowing

	Area sown in 2024-25 (lakh ha)	Area sown in 2025- 26 (Lakh ha)	Growth (YoY %)
Coarse Cereals	2.52	1.72	(31.7)
Rice	2.48	2.46	0.8
Pulses	0.81	0.99	22.2
Oilseeds	0.52	0.59	13.5
Cotton	8.78	9.72	10.7
Sugarcane	54.41	53.39	(1.9)
Jute and Mesta	5.59	5.42	(3.0)
All Crops	75.11	74.3	(1.1)

Source: CEIC, Bank of Baroda | Data as of 6 Jun 2025

Monsoon:

For the period 1 Jun 2025 to 15 Jun 2025, South West Monsoon is 31% below LPA compared with last year.

- Most part of the country, specifically, Central, Northern and North-Eastern regions have received deficient rainfall so far. These include states like Gujarat, Madhya Pradesh, Haryana, Arunachal Pradesh, Meghalaya and Assam.
- Uttar Pradesh, Jharkhand and Chhattisgarh too have noted largely deficient rainfall for the same period.

- Rajasthan, Karnataka and Tamil Nadu have reported normal rainfall so far.
- In contrast, Ladakh and Mizoram have reported excess rainfall.

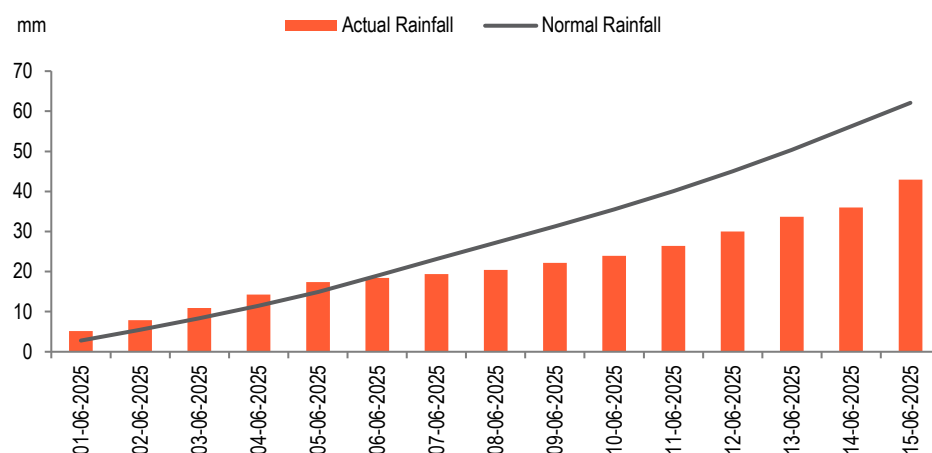
Fig 1: Distribution pattern of South-West Monsoon



Source: IMD, Bank of Baroda Research | Period from 1 Jun-15 Jun 2025

Overall cumulative rainfall this year remains marginally on the lower side so far at 42.9mm, compared with 52.3 mm last year. It is also lower than the normal rainfall (62.1mm) received during this period.

Fig 2: Cumulative Distribution of rainfall



Source: CEIC, Bank of Baroda

Table 2 shows, 22 subdivision, which account for 58% of the total area, have received deficient rainfall for cumulative period ranging from 1 Jun-15 Jun'25 and 8 sub-divisions have received normal rainfall. Amongst states, there are 23 states that have received deficient rainfall during this period.

Table 2: Subdivision wise distribution of Rainfall

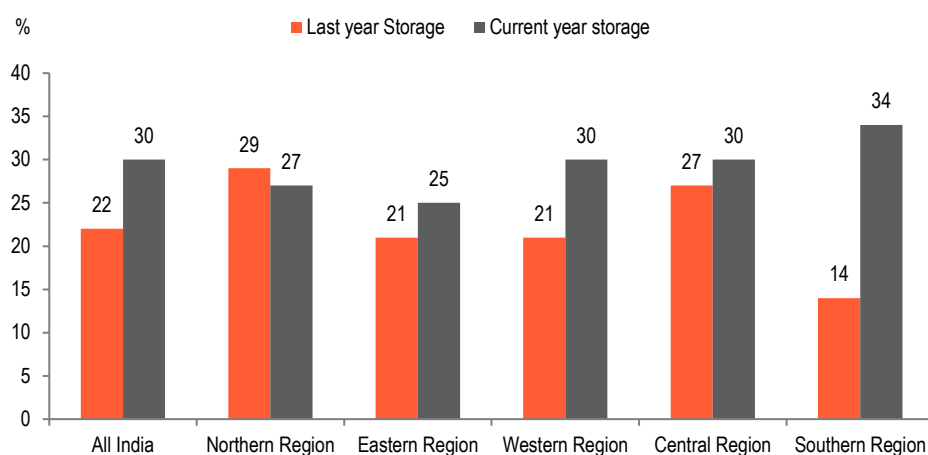
Period (1 Jun 2025-15 Jun 2025)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	0	0
Excess	1	2
Normal	8	22
Deficient	22	58
Large Deficient	5	18
No Rain	0	0

Source: IMD, Bank of Baroda

Reservoir storage status:

In terms of storage (Fig 3), the reservoir level as a % of total capacity stands at 30% as on 12 Jun 2025 (22% last year). Reservoir levels are much higher this year when compared with last year, across all the regions, with the exception of Northern region (27%). Amongst regions, Southern region has the highest reservoir level (34%), followed by Central and Western region (30%) along with Eastern region (25%).

Fig 3: Reservoir level across regions



Source: CEIC, Bank of Baroda

Key points to note:

- Cumulatively (1 Jun-15 Jun 2025), India has received 42.9mm rainfall, which is lower than normal (62.1) and 52.3mm recorded last year during the same period.
- This implies South-west monsoon is 31% below LPA compared to last year.
- Acreage of coarse cereals have registered a dip, while that of rice, pulses and oilseeds have seen an improvement (YoY basis) till 6 Jun 2025.
- Water reservoir levels is higher than last year, with All India reservoir at 30% of the total storage capacity versus 22% last year during the same period.

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