

Monsoon and Sowing: Update

South West monsoon picked up pace and so far has received above normal rainfall at 9% above LPA till 30 Jun 2025. This has resulted in higher sown area of kharif crops compared with last year. Higher acreage of pulses, rice and oilseeds has been registered. Out of 36, 19 sub-divisions (49% of the country) have received normal to excess rainfall during this period, while 10 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 (-17%), followed by Southern Peninsula (-3%) while central (25%) and North Western regions (42%) have reported above normal rainfall. For July'25, IMD expects above normal rainfall at 106% above LPA. Though, some parts of Southern peninsula and some regions in North Western region might witness below normal rainfall.

Where does Kharif sowing stand?

As of 27th Jun 2025, overall sown area has improved by 11.3% compared with last year. Total sown area of rice and pulses has grown by 47.3% and 37.2% respectively. Within pulses, urad and moong bean have registered an increase. Higher acreage has also been noted for oilseeds led by soybean and groundnut. In contrast, acreage of both cotton and jute & mesta have declined by (-) 8.9% and (-) 2.7% respectively for the same period.

Table 1: Kharif Sowing

	Area sown in 2024-25 (lakh ha)	Area sown in 2025- 26 (Lakh ha)	Growth (YoY %)
Coarse Cereals	35.01	41.75	19.3
Rice	23.78	35.02	47.3
Pulses	15.37	21.09	37.2
Oilseeds	40.82	48.99	20.0
Cotton	59.97	54.66	(8.9)
Sugarcane	54.88	55.16	0.5
Jute and Mesta	5.62	5.47	(2.7)
All Crops	235.45	262.14	11.3

Source: CEIC, Bank of Baroda | Data as of 27 Jun 2025

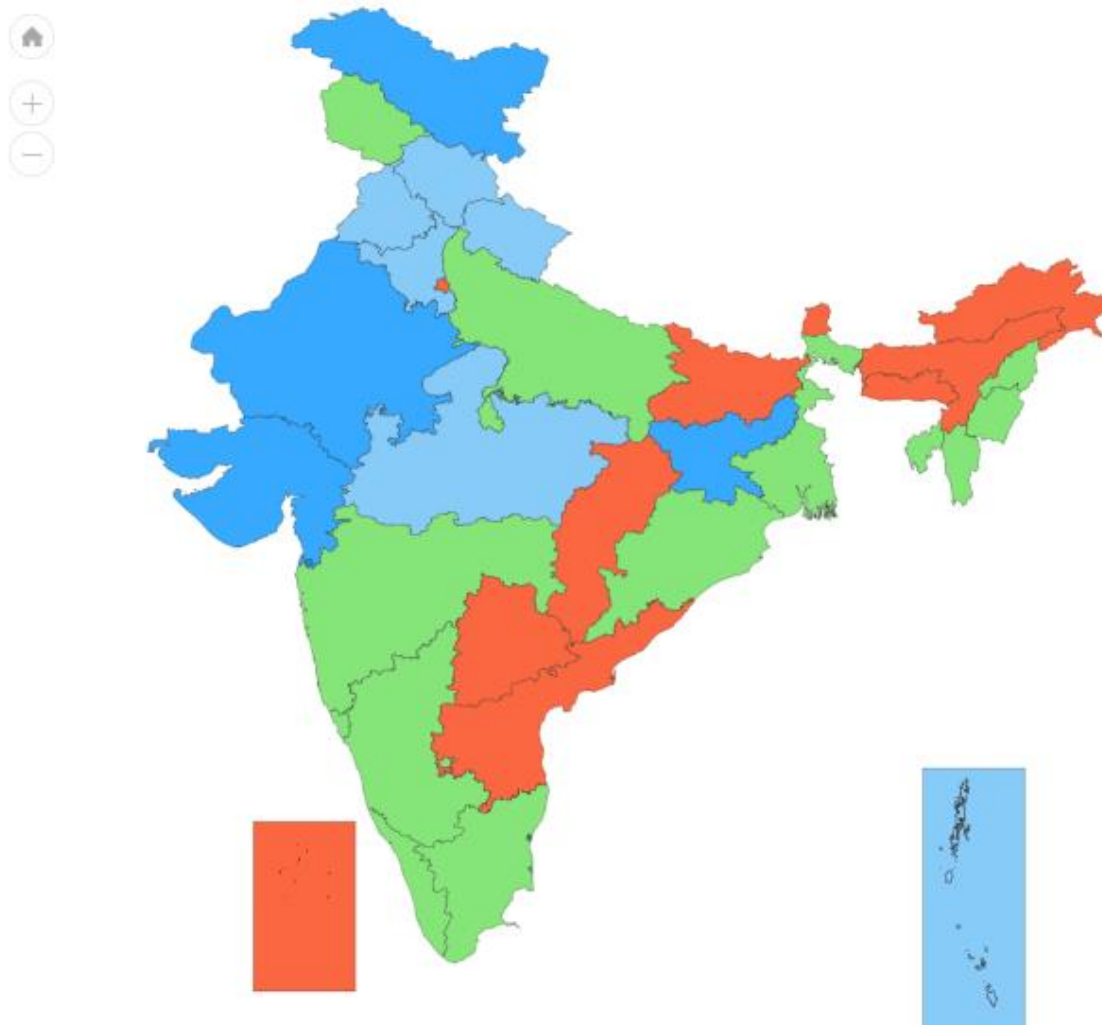
Monsoon:

For the period 1 Jun 2025 to 30 Jun 2025, South West Monsoon is 9% above LPA compared with last year.

- A large part of the country, specifically, Northern and Central regions have received excess rainfall so far. These include states like Gujarat, Rajasthan, Madhya Pradesh, Haryana, and Himachal Pradesh.
- Parts of Central and Southern region have received normal rainfall during this period such as Maharashtra, Karnataka, Kerala and Tamil Nadu.
- Eastern and North Eastern region of the country have reported deficient rainfall, with states like Bihar, Chhattisgarh, Assam, Nagaland and Meghalaya.

- Some states in Southern belt continue to remain in the deficient zone such as Andhra Pradesh and Telangana.

Fig 1: Distribution pattern of South-West Monsoon

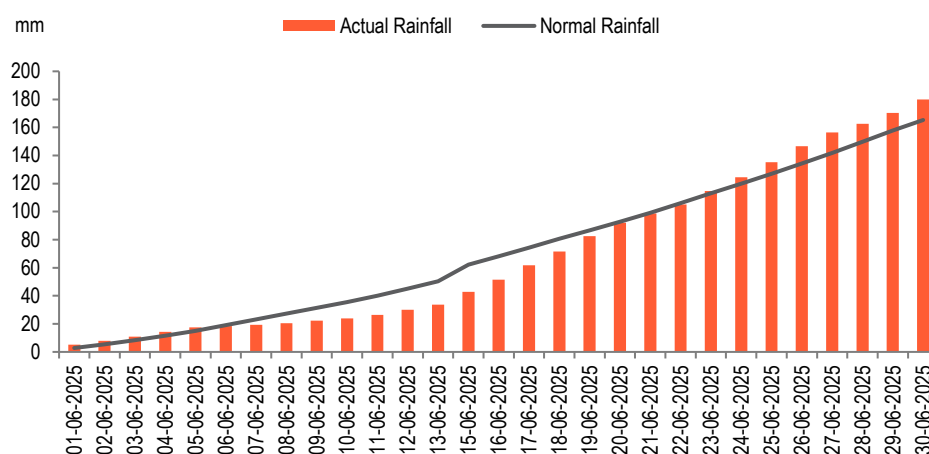


Source: IMD, Bank of Baroda Research | Period from 1 Jun-30 Jun 2025

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 (Fig 2) this year has been higher at 180mm, compared with 147 mm last year. It is also been higher than the normal rainfall (165mm) received during this period.

Fig 2: Cumulative Distribution of rainfall



Source: CEIC, Bank of Baroda

Table 2 shows, 11 subdivision, which account for 33% of the total area, have received normal rainfall for cumulative period ranging from 1 Jun-30 Jun'25 and 10 sub-divisions have received deficient rainfall. Amongst states, there are 13 states that have received normal rainfall during this period.

Table 2: Subdivision wise distribution of Rainfall

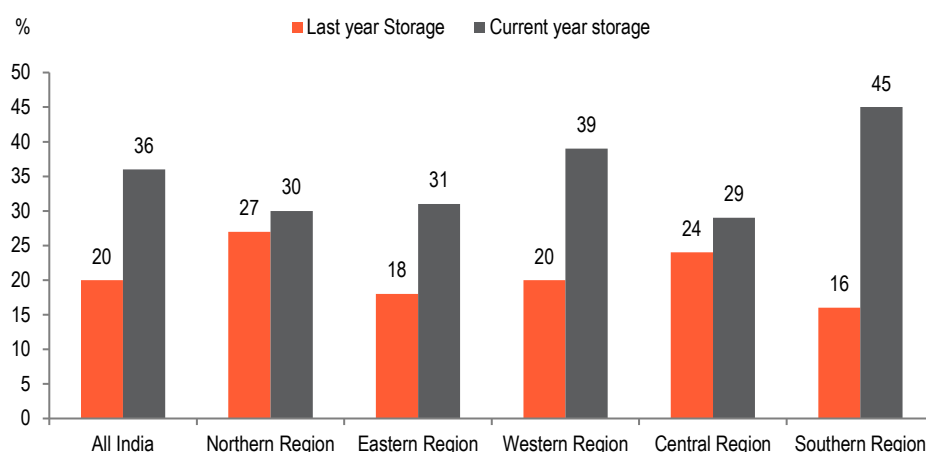
Period (1 Jun 2025-22 Jun 2025)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	7	27
Excess	8	16
Normal	11	33
Deficient	10	24
Large Deficient	0	0
No Rain	0	0

Source: IMD, Bank of Baroda

Reservoir storage status:

In terms of storage (Fig 3), the storage level for 161 reservoir as a % of total capacity stands at 36% as on 26 Jun 2025 (20% last year). Reservoir levels continue to be much higher this year when compared with last year, across all the regions. Amongst regions, Southern region has the highest reservoir level (45%), followed by Western (39%), Eastern region (31%) and Northern region (30%) along with Central region (29%)

Fig 3: Reservoir level across regions



Source: CEIC, Bank of Baroda

Key points to note:

- Cumulatively (1 Jun-30 Jun 2025), India has received 180mm rainfall, which is higher than normal and even higher than 147mm recorded last year during the same period.
- This implies South-west monsoon is 9% above LPA compared to last year.
- Acreage of pulses, rice, and oilseeds have registered an improvement, while that of cotton cereals has seen a dip (YoY basis) till 27 Jun 2025.
- Water reservoir levels is higher than last year, with All India reservoir at 36% of the total storage capacity versus 20% last year during the same period.

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