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Monsoon and Sowing: Update

South West monsoon began gathering pace and so far received below normal rainfall at 1% below LPA till 22 Jun 2025. This recent pickup has resulted in higher sown area of kharif crops compared with last year. Higher acreage of rice, oilseeds and pulses has been registered. Out of 36, 24 sub-divisions (67% of the country) have received normal to excess rainfall during this period, while 11 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 (-15%), followed by Southern Peninsula (-10%) while central (8%) and North Western regions (26%) have reported above normal rainfall. Further pickup in monsoon is expected in the coming days with the possibility of heavy rainfall in the North West region.

Where does Kharif sowing stand?

As of 13th Jun 2025, overall sown area has improved by 1.7% compared with last year. Total sown area of rice and pulses has grown by 13.3% and 18.1% respectively. Within pulses, urad and moong bean have registered an increase. Higher acreage has also been noted for oilseeds led by soybean. In contrast, acreage of both cotton and jute & mesta have declined by (-) 0.7% and (-) 3% 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	5.9	5.89	(0.2)
Rice	4	4.53	13.3
Pulses	2.6	3.07	18.1
Oilseeds	1.5	2.05	36.7
Cotton	13.28	13.19	(0.7)
Sugarcane	54.88	55.07	0.3
Jute and Mesta	5.65	5.48	(3.0)
All Crops	87.81	89.29	1.7

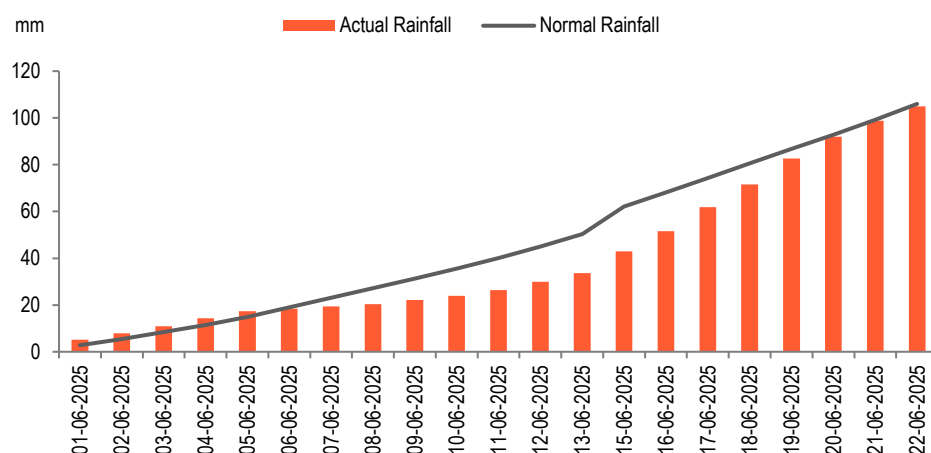
Source: CEIC, Bank of Baroda | Data as of 13 Jun 2025

Monsoon:

For the period 1 Jun 2025 to 22 Jun 2025, South West Monsoon is 1% below LPA compared with last year.

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

Fig 2: Cumulative Distribution of rainfall



Source: CEIC, Bank of Baroda

Table 2 shows, 13 subdivision, which account for 36% of the total area, have received normal rainfall for cumulative period ranging from 1 Jun-22 Jun'25 and 12 sub-divisions have received deficient rainfall. Amongst states, there are 18 states that have received normal rainfall during this period.

Table 2: Subdivision wise distribution of Rainfall

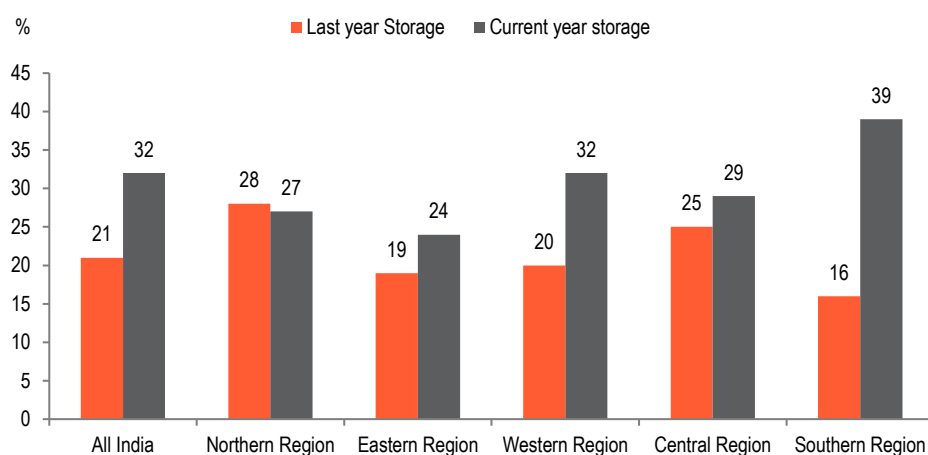
Period (1 Jun 2025-22 Jun 2025)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	4	13
Excess	7	23
Normal	13	36
Deficient	12	28
Large Deficient	0	0
No Rain	0	0

Source: IMD, Bank of Baroda

Reservoir storage status:

In terms of storage (Fig 3), the reservoir level as a % of total capacity stands at 32% as on 19 Jun 2025 (21% last year). Reservoir levels continue to be 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 (39%), followed by Western (32%) and Central region (29%) along with Eastern region (24%).

Fig 3: Reservoir level across regions



Source: CEIC, Bank of Baroda

Key points to note:

- Cumulatively (1 Jun-22 Jun 2025), India has received 105mm rainfall, which is lower than normal and but higher than 88.2mm recorded last year during the same period.
- This implies South-west monsoon is 1% above LPA compared to last year.
- Acreage of rice, pulses and oilseeds have registered an improvement, while that of coarse cereals has seen a dip (YoY basis) till 13 Jun 2025.
- Water reservoir levels is higher than last year, with All India reservoir at 32% of the total storage capacity versus 21% last year during the same period.

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