

## **Monsoon and Sowing: Update**

Rainfall is currently 7% above the LPA till 27 Aug 2024. Pickup in momentum has been noted towards the end of Aug'24, with cumulative rainfall at 73.8mm between 21 and 27 Aug 2024, compared with 48.9mm between 13 and 20 Aug. Between 1 Jun and 27 Aug 2024, out of 36 sub-divisions, 31 (84% of the country) have received normal or above normal rainfall so far and 8 states are in the deficient zone. Region-wise, Southern peninsula (+18%) and Central region (+17%) continue to record excess rainfall. In contrast, East & North East (-11%) region continues to report deficient rainfall. Supported by higher than normal rainfall, there has been continued improvement in the sown area (+1.9% YoY), with higher acreage of pulses, paddy, oilseeds, sugarcane and coarse cereals. Latest data shows, that when compared with normal area of last year, this year ~97% of sowing has been completed so far. As sowing and monsoon inches closer to the end, the focus will now shift towards the harvest season. Excess/large of rainfall can be damaging for crops.

### **Where does Kharif sowing stand?**

As of 27 Aug 2024, overall sown area has improved by 1.9% compared with last year.

- Barring Jute and cotton, total sown area of other crops continues to increase. Most notable jump is visible in pulses (5.7%), coarse cereals (4.5%) and paddy (4.3%).
- Within pulses, rise in acreage of Arhar (12.4%), Moong bean (11.4%) and other pulses (2.9%), led to rise in the headline number.
- In contrast, Kulthi, Urdbean and Moth continue to record a decline.
- Within Coarse Cereals, sown area of only Bajra fell (-1.6%), while that of crops such as Maize, Jowar, Ragi and small millets inched up.
- Oilseeds have also registered 0.5% increase in sown area. Within this, sown area of Soybean, Groundnut and Sunflower inched up, while that of Sesamum, Niger, and Castor declined.
- Amongst other major sub-heads, sown area of Sugarcane (1%) also rose.
- Sown area of Jute & Mesta was down by (-) 13.1% and that of Cotton fell by (-) 9.2% compared with last year.
- This latest data shows that compared with normal sown area of last year, ~97% of the sowing has been completed so far.

**Table 1: Kharif Sowing**

	<b>Normal Sown Area 2024 (lakh ha)</b>	<b>Area sown in 2023-24 (lakh ha)</b>	<b>Area sown in 2024-25 (Lakh ha)</b>	<b>Growth (YoY %)</b>
Coarse Cereals	180.9	177.5	185.5	4.5
Paddy	401.6	378.0	394.3	4.3
Pulses	136.0	115.6	122.2	5.7
Oilseeds	190.2	187.4	188.4	0.5
Cotton	129.3	122.7	111.4	(9.2)
Sugarcane	55.4	57.1	57.7	1.0
Jute and Mesta	6.7	6.6	5.7	(13.1)
<b>All Crops</b>	<b>1100.1</b>	<b>1044.9</b>	<b>1065.1</b>	<b>1.9</b>

Source: PIB, CMIE, Bank of Baroda research | Data as of 27 Aug 2024

**Monsoon:**

For the period 1 Jun to 27 Aug 2024, South West Monsoon is 7% above LPA compared with last year.

- Most part of the country, specifically, Central, Eastern and parts of North-Eastern regions continue to receive normal rainfall so far. These include states like, M.P., U.P., Haryana, Uttarakhand, Jharkhand, Chhattisgarh, W. Bengal, Odisha, Assam, Mizoram and Meghalaya.
- Telangana and Kerala have also received normal rainfall.
- Some parts of western and southern region of the country recorded excess rainfall. This includes states like Rajasthan, Gujarat, Maharashtra, Karnataka, and Andhra Pradesh.
- Ladakh, and Sikkim also received excess rainfall.
- Tamil Nadu remains the only state to receive large excess of rainfall in this period.
- In contrast, J&K, Punjab, Himachal Pradesh, Bihar, Arunachal Pradesh, Nagaland and Manipur, have noted deficient rainfall till 27 Aug 2024.

**Fig 1: Distribution pattern of South-West Monsoon**



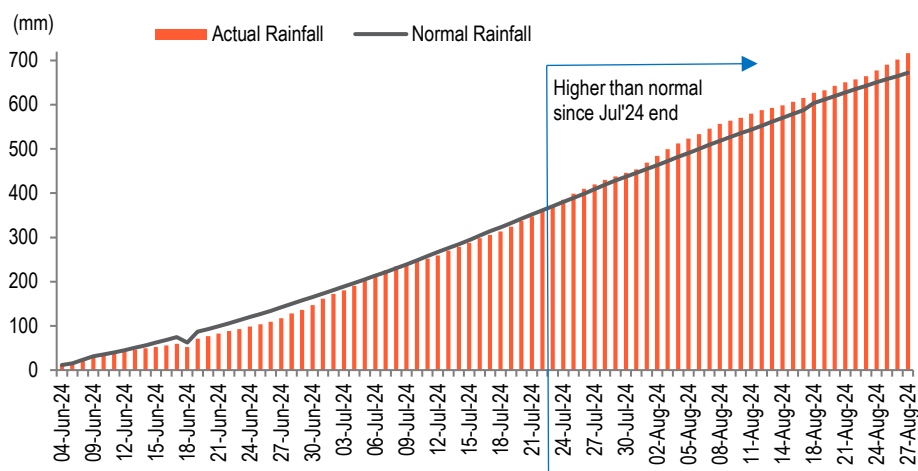
Source: IMD, Bank of Baroda Research | Period from 1 Jun-12 Aug 2024

**Legend**

Large Excess [ 60% or more] | Excess [ 20% to 59%] | Normal [-19% to 19%] | Deficient [-59% to -20%] | Large Deficient [-99% to -60%] | No Rain [-100%] | No Data

Overall, cumulative rainfall this year remains much higher so far at 716.4mm, compared with 621.3mm last year. It is even higher than the normal rainfall (672.1mm) received during this period.

**Fig 2: Cumulative Distribution of rainfall**



Source: CEIC, Bank of Baroda Research

**Table 2** shows, 31 subdivision, which account for 84% of the total area, have received normal or above rainfall for cumulative period ranging from 1 Jun-27 Aug'24 and 5 sub-divisions have received deficient rainfall. Amongst states, there are 8 states that have received deficient rainfall during this period.

**Table 2: Subdivision wise distribution of Rainfall**

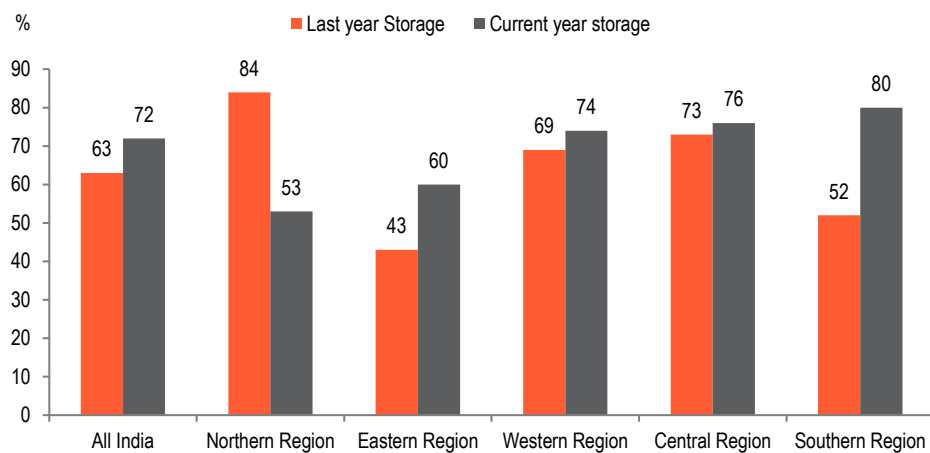
Period (1 Jun 2024-27 Aug 2024)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	3	13
Excess	9	20
Normal	19	51
Deficient	5	16
Large Deficient	0	0
No Rain	0	0

Source: IMD, Bank of Baroda Research

### **Reservoir storage status:**

In terms of storage (Fig 3), the reservoir level as a % of total capacity stands at 72% as on 22 Aug 2024 (63% last year). All regions have noted an improvement over the last year, except for the Northern region (53% this year versus 84% last year). Amongst other regions, Southern region has the highest reservoir level (80%), followed by Central (76%) and Western (74%) regions.

**Fig 3: Reservoir level across regions**



Source: Central Water Commission, Bank of Baroda Research

### **Key points to note:**

- Cumulatively (1 Jun-27 Aug 2024), India has received 716.4mm rainfall, which is higher than 621.3mm recorded last year during the same period.
- It is even higher than the normal level of rainfall of 672.1mm.
- This implies the South-west monsoon is 7% above LPA compared so far.
- Higher than normal rainfall has helped the sown area. Acreage of pulses, paddy, coarse cereals, sugarcane and oilseeds has seen an improvement (YoY basis) till 27 Aug 2024.
- As of 22 Aug 2024, water reservoir levels remain higher than last year, with All India reservoir level at 72% of the total storage capacity versus 63% last year during the same period.

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