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Monsoon and Sowing: Update

Rainfall is currently 2% above the LPA till 29 Jul 2024. Pickup was noted towards the end of the month when 90.1mm rainfall was received between 22-29 July, versus 69.5mm in the 3rd week of July. Out of 36, 27 sub-divisions (75% of the country) have received normal or above normal rainfall so far and 10 states are in the deficient zone. Region-wise, Southern peninsula (+24%) and Central region (+17%) have reported excess rainfall, while North West (-16%) and East & North East (-18%) regions have reported deficient rainfall. Supported by higher than normal rainfall, there is an improvement noted in the sown area, with higher acreage of pulses, oilseeds, and coarse cereals compared with last year. Worryingly, sown area of paddy has seen a marginal decline. As majority of sowing occurs during the July and August period, rainfall distribution next month will also be critical.

Where does Kharif sowing stand?

As of 26th Jul 2024, overall sown area has improved by 2.3% compared with last year.

- Total sown area of pulses (14%) has risen notably. Within pulses, steep rise in acreage of Arhar (34.1%) has led to increase in the headline number.
- Apart from this, acreage of Moongbean (12.4%) was also up. In contrast, Kulthi, moth and Urdbean have recorded notable decline so far.
- Oilseeds have also registered 3.8% increase in sown area. Within this, sown area of sunflower (30.4%) and groundnut (13.7%) jumped, while that of Sesamum declined.
- Amongst other major sub-heads, sown area of coarse cereals (5%) and sugarcane (1.1%) has come down. Within coarse cereals, sown area of crops such as Jowar, Ragi, Maize and small millets inched up, while that of Bajra continues to decline.
- Sown area of cotton and sugarcane has also noted a decline (-6.9%). Most notably, sown area of paddy is down by (-) 0.2% so far.

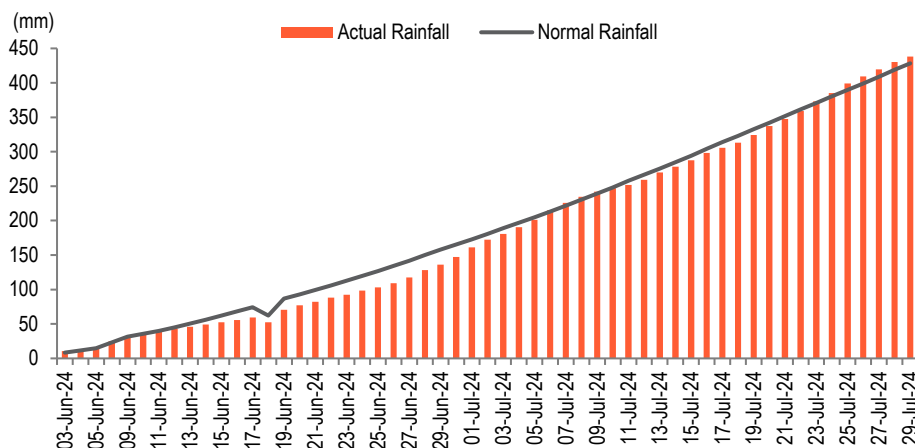
Table 1: Kharif Sowing

	Normal Sown Area 2024 (lakh ha)	Area sown in 2023-24 (lakh ha)	Area sown in 2024-25 (Lakh ha)	Growth (YoY %)
Coarse Cereals	181.0	145.8	153.1	5.0
Paddy	401.6	216.4	216.0	(0.2)
Pulses	136.0	89.4	102.0	14.1
Oilseeds	190.2	165.4	171.7	3.8
Cotton	129.3	113.5	105.7	(6.9)
Sugarcane	55.4	57.1	57.7	1.1
Jute and Mesta	6.7	6.1	5.7	(6.9)
All Crops	1100.2	793.6	811.9	2.3

Source: CEIC, Bank of Baroda research | Data as of 26 Jul 2024

Overall, cumulative rainfall this year remains marginally on the lower side so far at 438mm, compared with 457.6mm last year. However, it is higher than the normal rainfall (423.3mm) received during this period.

Fig 2: Cumulative Distribution of rainfall



Source: CEIC, Bank of Baroda Research

Table 2 shows, 27 subdivision, which account for 75% of the total area, have received normal or above rainfall for cumulative period ranging from 1 Jun-29 Jul'24 and 9 sub-divisions have received deficient rainfall. Amongst states, there are 10 states that have received deficient rainfall during this period.

Table 2: Subdivision wise distribution of Rainfall

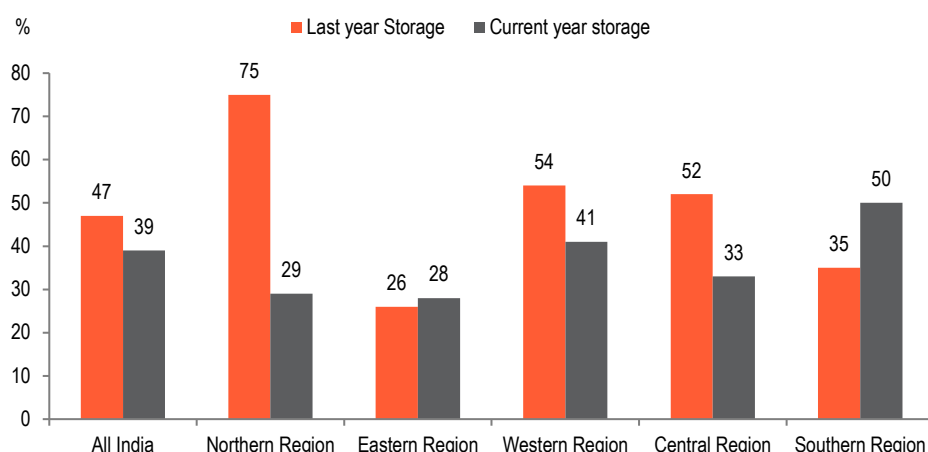
Period (1 Jun 2024-29 Jul 2024)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	0	0
Excess	13	32
Normal	14	43
Deficient	9	25
Large Deficient	0	0
No Rain	0	0

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 39% as on 25 Jul 2024 (47% last year). Reservoir levels are much lower this year when compared with last year, across all the regions, with the exception of Eastern and Southern region. Amongst regions, Southern region has the highest reservoir level (50%), followed by Western region (41%).

Fig 3: Reservoir level across regions



Source: Central Water Commission, Bank of Baroda Research

Key points to note:

- Cumulatively (1 Jun-29 Jul 2024), India has received 438mm rainfall, which slightly lower than 457.6mm recorded last year during the same period.
- However, it is higher than normal level of rainfall of 428.3mm
- This implies South-west monsoon is 2% above LPA compared so far.
- Higher than normal rainfall has helped sown area. Acreage of pulses, coarse cereals and oilseeds have seen an improvement (YoY basis) till 26 Jul 2024.
- As of 25 July 2024, water reservoir levels remains lower than last year, with All India reservoir level at 39% of the total storage capacity versus 47% last year during the same period.

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