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Monsoon and Sowing: Update

Rainfall is currently 4% above the LPA till 2 Aug 2024. Pickup was noted in the last fortnight when 160.7mm rainfall was received between 20 Jul and 2 Aug, versus 123.7mm between 6 and 19 Jul. Out of 36, 27 sub-divisions (77% of the country) have received normal or above normal rainfall so far and 11 states are in the deficient zone. Region-wise, Southern peninsula (+27%) and Central region (+18%) continue to record excess rainfall, while North West (-12%) and East & North East (-16%) regions still report deficient rainfall. Supported by higher than normal rainfall, there is an improvement noted in the sown area, with higher acreage of pulses, paddy, oilseeds, sugarcane and coarse cereals compared with last year. Spatial distribution of rainfall will be critical this month as well, for sowing purposes.

Where does Kharif sowing stand?

As of 2nd Aug 2024, overall sown area has improved by 2.9% compared with last year.

- Barring Jute and cotton, total sown area of other crops has inched up. Most notable increase is visible in pulses (10.9%) and paddy (5.3%).
- Within pulses, rise in acreage of Arhar (25.9%), Moong bean (12.3%) and other pulses (4%), led to jump in the headline number.
- In contrast, Kulthi, Moth and Urdbean have recorded a decline so far.
- Oilseeds have also registered 3% increase in sown area. Within this, sown area of Soybean, Groundnut, Sunflower and Niger jumped, while that of Sesamum and Castor declined.
- Amongst other major sub-heads, sown area of coarse cereals (3.2%) and Sugarcane (1%) also rose.
- Within Coarse Cereals, sown area of crops such as Maize, Jowar, and small millets inched up, while that of Bajra and Ragi fell.
- Sown area of jute & Mesta was down by (-) 5% and that of Cotton fell by (-) 8.3% compared with last year.

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	160.4	165.6	3.2
Paddy	401.6	263.0	276.9	5.3
Pulses	136.0	99.7	110.6	10.9
Oilseeds	190.2	174.5	179.7	3.0
Cotton	129.3	118.2	108.4	(8.3)
Sugarcane	55.4	57.1	57.7	1.0
Jute and Mesta	6.7	6.3	5.7	(9.5)
All Crops	1100.2	879.2	904.6	2.9

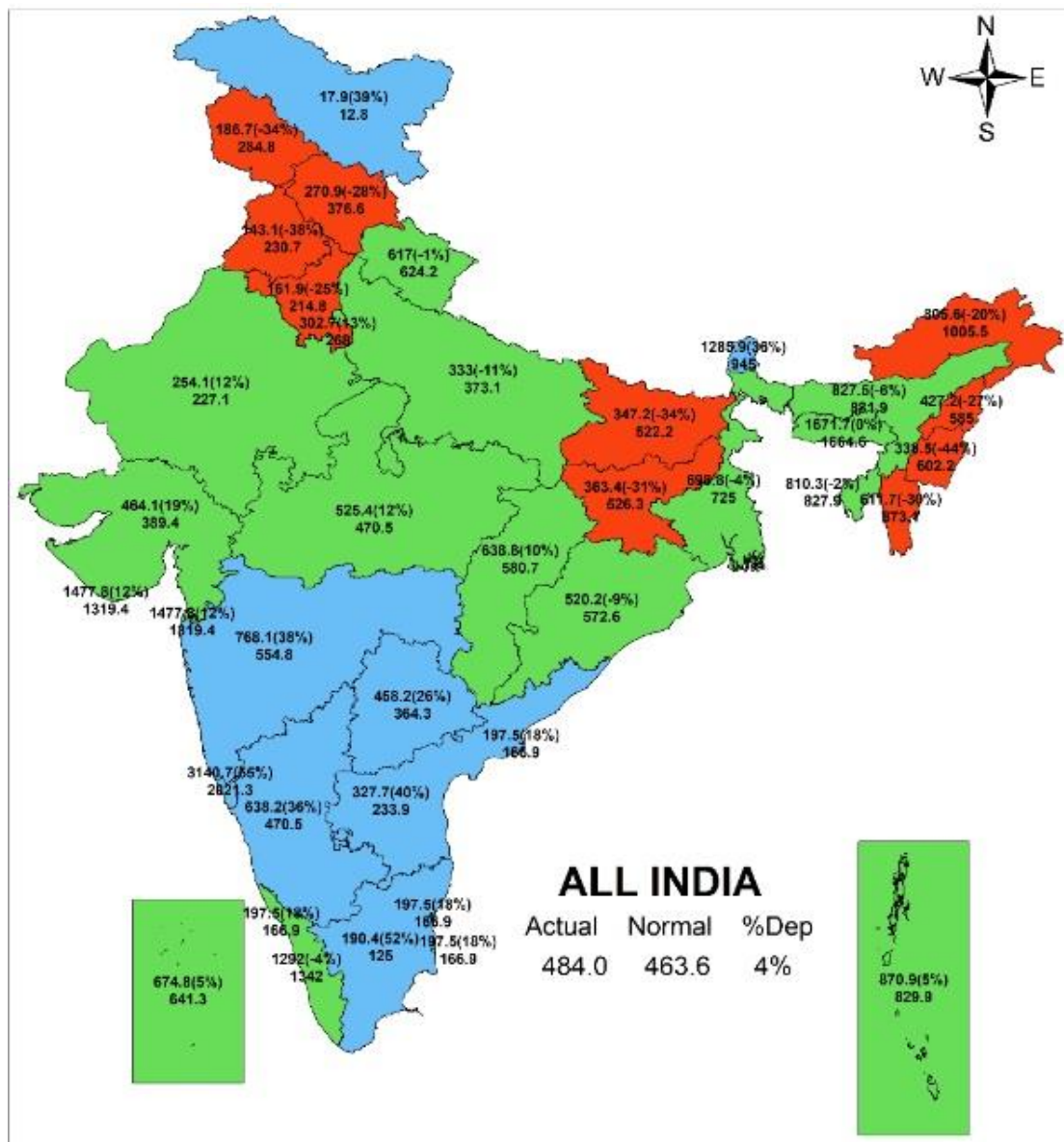
Source: PIB, CMIE, Bank of Baroda research | Data as of 2 Aug 2024

Monsoon:

For the period 1 Jun to 2 Aug 2024, South West Monsoon is 4% above LPA compared with last year.

- Most part of the country, specifically, Central, Eastern and parts of North-Eastern regions have received normal rainfall so far. These include states like Gujarat, Rajasthan, M.P., U.P., Chhattisgarh, Odisha, Assam, and Tripura.
- Kerala has also received normal rainfall.
- Western and most of Southern region of the country continues to record excess rainfall. This includes states like Maharashtra, Telangana, Andhra Pradesh, Tamil Nadu, and Karnataka.
- Ladakh and Sikkim also continue to receive excess rainfall.
- In contrast, J&K, Haryana, Punjab, Himachal Pradesh, Uttarakhand, Delhi, Arunachal Pradesh, Nagaland, Manipur, and Mizoram have noted deficient rainfall till 2 Aug 2024.

Fig 1: Distribution pattern of South-West Monsoon



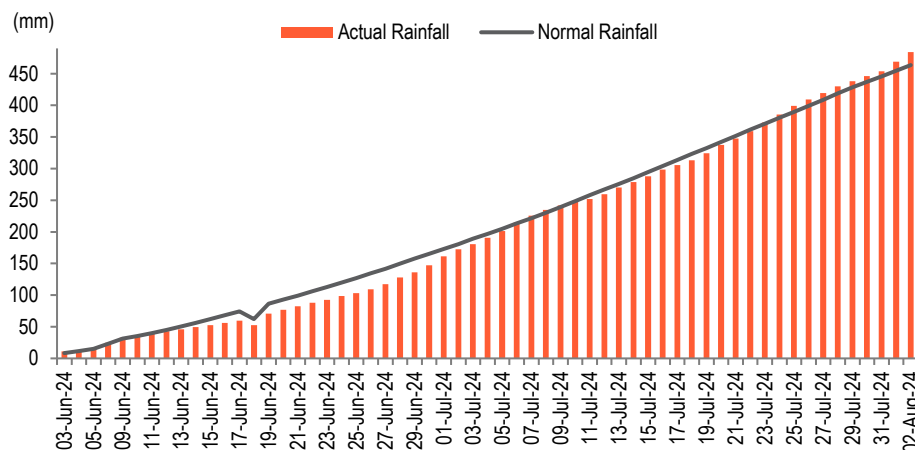
Source: IMD, Bank of Baroda Research | Period from 1 Jun-2 Aug 2024

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 marginally on the higher side so far at 484mm, compared with 483.1mm last year. It is even higher than the normal rainfall (463.6mm) received during this period.

Fig 2: Cumulative Distribution of rainfall



Source: CEIC, Bank of Baroda Research

Table 2 shows, 27 subdivision, which account for 77% of the total area, have received normal or above rainfall for cumulative period ranging from 1 Jun-2 Aug'24 and 9 sub-divisions have received deficient rainfall. Amongst states, there are 11 states that have received deficient rainfall during this period.

Table 2: Subdivision wise distribution of Rainfall

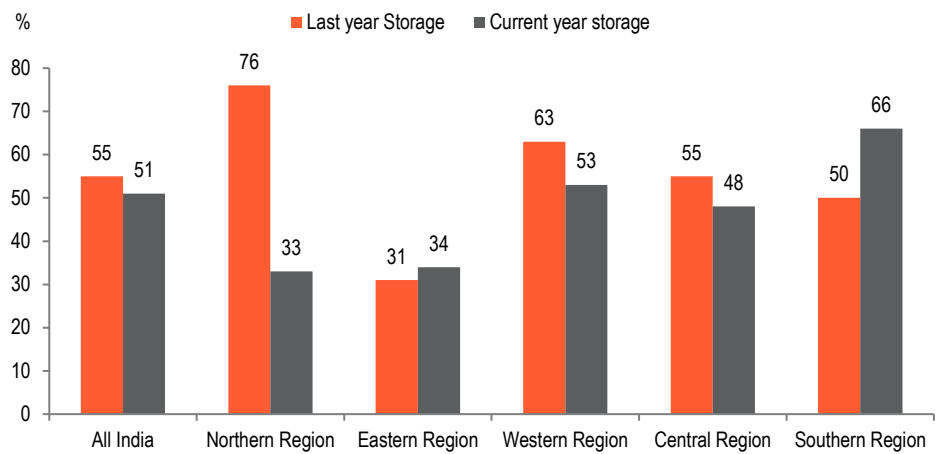
Period (1 Jun 2024-2 Aug 2024)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	0	0
Excess	13	32
Normal	14	45
Deficient	9	23
Large Deficient	0	0
No Rain	0	0

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 51% as on 1 Aug 2024 (55% last year). Reservoir levels are slightly 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 (66%), followed by Western (53%) and Central (48%) regions.

Fig 3: Reservoir level across regions



Source: Central Water Commission, Bank of Baroda Research

Key points to note:

- Cumulatively (1 Jun-2 Aug 2024), India has received 484mm rainfall, which is slightly higher than 483.1mm recorded last year during the same period.
- It is even higher than the normal level of rainfall of 463.6mm.
- This implies the South-west monsoon is 4% 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 2 Aug 2024.
- As of 1 Aug 2024, water reservoir levels remain lower than last year, with All India reservoir level at 51% of the total storage capacity versus 55% last year during the same period.

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