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Monsoon and Sowing: Update

Aided by strong rainfall, kharif acreage has picked up pace and registered an improvement since last year. Crop wise, higher sown area has been noted for rice, pulses and coarse cereals, while oilseed and cotton registered lower sowing. Out of 36, 33 sub-divisions (81% of the country) have received normal to excess rainfall during this period, while 4 states are in deficient zone. Region-wise, with the exception of East and North eastern India which has reported deficient rainfall (-18%), other regions such as North Western (36%), Southern Peninsula (10%) followed by central region (9%) have reported surplus rainfall. Month wise, surplus rains has also been noted in Aug'25, though it has been lower than last year. As per the NOAA, the ENSO neutral conditions are expected to prevail through Oct'25 and will be followed by La Nina conditions for a brief period, before reverting back to ENSO neutral.

Where does Kharif sowing stand?

As of 29nd Aug 2025, overall Kharif acreage has grown by 3.1% compared with last year. With this, the total sown area has covered 99.7% of the normal area. Steady pickup has been noted in sown area for coarse cereals (6.3%) and rice (6.6%). Acreage of pulse have also inched up by 0.9% led by urad and moong bean. Higher acreage has also been noted for sugarcane for the same period. On the other hand, sown area for oilseeds and cotton continue to lag behind. Within oilseeds, lower acreage has been reported for soybean and groundnut. Jute & Mesta sowing has declined by (-) 3.3% for this period.

Table 1: Kharif Sowing

	Area sown in 2024-25 (lakh ha)	Area sown in 2025- 26 (Lakh ha)	Growth (YoY %)
Coarse Cereals	178.48	189.67	6.3
Rice	405.34	431.96	6.6
Pulses	113.47	114.46	0.9
Oilseeds	190.27	185.17	(2.7)
Cotton	111.39	108.77	(2.4)
Sugarcane	55.68	57.31	2.9
Jute and Mesta	5.73	5.54	(3.3)
All Crops	1060.36	1092.87	3.1

Source: CEIC, Bank of Baroda | Data as of 29 Aug 2025

Monsoon:

For the period 1 Jun 2025 to 3 Sep 2025, South West Monsoon is 8% above LPA compared with last year.

- Majority of the country has been witnessing normal rainfall, with some states receiving excessive high rainfall. These include Ladakh, Rajasthan, Jharkhand and Madhya Pradesh.
- The North Eastern belt continue to receive deficient rainfall during this period, with states like Bihar, Assam, Meghalaya and Arunachal Pradesh.
- IMD expects normal to above normal rain in Sep'25, with expectation that monthly rainfall will be 109% of the LPA.

Fig 1: Distribution pattern of South-West Monsoon

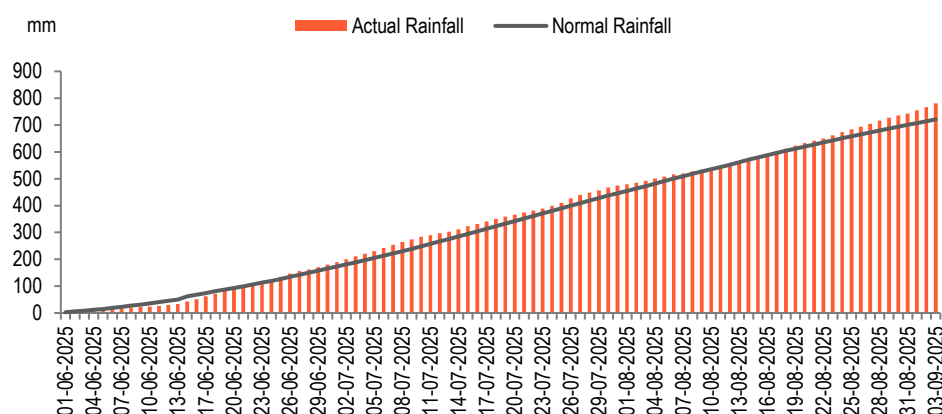


Source: IMD, Bank of Baroda Research | Period from 1 Jun-3 Sep 2025

■ 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 actual rainfall (Fig 2) this year has been higher at 780.8mm, compared with 777.6 mm last year. Moreover, it has also been higher than the normal rainfall (721.1mm) received during this period.

Fig 2: Cumulative Distribution of rainfall



Source: CEIC, Bank of Baroda

Table 2 shows, 20 subdivision, which account for 48% of the total area, have received normal rainfall for cumulative period ranging from 1 Jun-3 Sep'25 and 3 sub-divisions have received deficient rainfall. Amongst states, majority of them that have received normal rainfall during this period.

Table 2: Subdivision wise distribution of Rainfall

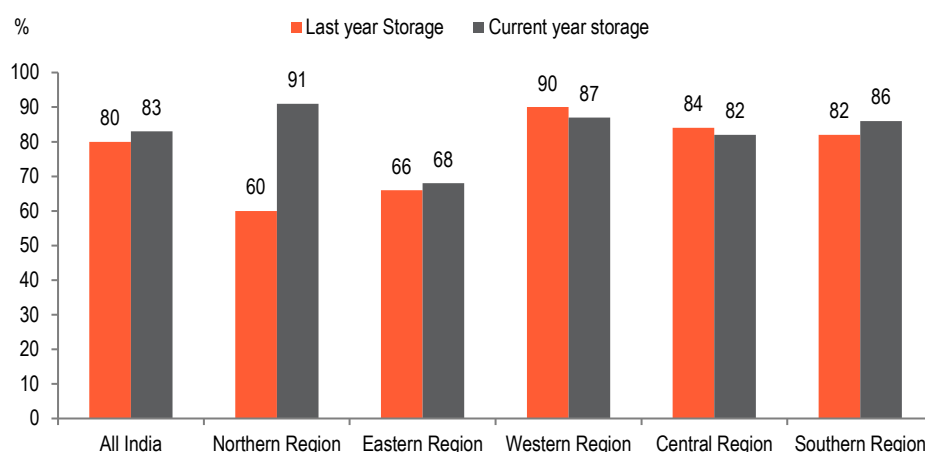
Period (1 Jun 2025-3 Sep 2025)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	2	10
Excess	11	33
Normal	20	48
Deficient	3	9
Large Deficient	0	0
No Rain	0	0

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 83% as on 28 Aug 2025 (80% last year). Reservoir levels continue to be much higher this year when compared with last year, across major regions, barring Western and Central region. Region wise, Northern region has noted highest reservoir level (91% against 60%), followed by Southern (86% versus 82% last year) and Eastern (68% versus 66%) region. In contrast, lower storage level has been registered this year for Central region (82% from 84%) and Western region (87% versus 90%).

Fig 3: Reservoir level across regions



Source: CEIC, Bank of Baroda

Key points to note:

- Cumulatively (1 Jun-3 Sep 2025), India has received 780.8mm rainfall, which is higher than both normal (721.1mm) and actual rainfall 777.6mm recorded last year during the same period.
- This implies, South-west monsoon is 8% above LPA compared to last year.
- Acreage of coarse cereals, pulses and rice, continue to register an improvement, while that of oilseeds and cotton continue to lag (YoY basis) till 29 Aug 2025.
- Water reservoir levels is higher than last year, with All India reservoir at 83% of the total storage capacity versus 80% last year during the same period.

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