

Monsoon and Sowing: Update

Kharif sowing has picked up pace supported by strong advancement of South West monsoon. Region-wise, a broad based deviation has been noted across all the regions. East and North eastern India reported deficient rainfall (-18%), followed by Southern Peninsula (0%) while central (3%) and North Western regions (17%) have reported normal rainfall. Out of 36, 32 sub-divisions (89% of the country) have received normal to excess rainfall during this period, while 4 states are in the deficient zone. In terms of progress, monsoon has been higher this year in Jun'25 (-10.7% versus 10.8%), lower in Jul'25 (10% versus 4.9%) and even in Aug'25 so far (26.4% versus -26.1%). In the coming week, IMD expects widespread rainfall in Northern peninsula and adjoining Central India. Moreover, below normal rainfall is expected in major parts of Western Himalaya.

Where does Kharif sowing stand?

As of 8th Aug 2025, overall sown area has improved by 4% compared with last year. Total sown area of coarse cereals and rice have registered a robust growth of 4.5% and 12.1% respectively. Marginally higher acreage has also been noted for pulses, with steady growth noted in moong and urad. In contrast, lower sown area has been noted for oilseeds on the back of much lower sowing noted in soybean and groundnut. Additionally, lower acreage has also been noted for both cotton and jute and mesta which has declined by (-) 3.2% and (-) 3.0% respectively for the same period. Sugarcane sowing has registered an improvement during this period.

Table 1: Kharif Sowing

	Area sown in 2024-25 (lakh ha)	Area sown in 2025- 26 (Lakh ha)	Growth (YoY %)
Coarse Cereals	170.96	178.73	4.5
Rice	325.36	364.8	12.1
Pulses	106.52	106.68	0.2
Oilseeds	182.43	175.61	(3.7)
Cotton	110.49	106.96	(3.2)
Sugarcane	55.68	57.31	2.9
Jute and Mesta	5.71	5.54	(3.0)
All Crops	957.15	995.63	4.0

Source: CEIC, Bank of Baroda | Data as of 8 Aug 2025

Monsoon:

For the period 1 Jun 2025 to 12 Aug 2025, South West Monsoon is 0.3% above LPA compared with last year.

- Major part of the country specially the Northern and Central region such as Maharashtra, Haryana, Uttar Pradesh and Gujarat have been witnessing normal rainfall during this period.
- Even some states in Southern belt continue to remain in this zone, including states like Kerala, Karnataka, Tamil Nadu and Andhra Pradesh.
- Rajasthan, Madhya Pradesh, Jharkhand and Ladakh have received excess rainfall in this period. While some Eastern and North Eastern region of the country have reported deficient rainfall.

Fig 1: Distribution pattern of South-West Monsoon

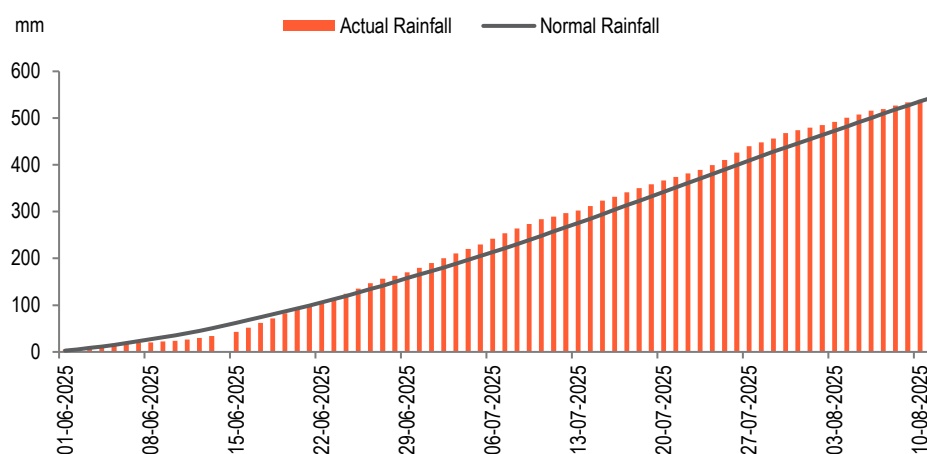


Source: IMD, Bank of Baroda Research | Period from 1 Jun-12 Aug 2025

- 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 rainfall (Fig 2) this year has been lower at 552.7mm, compared with 587.6 mm last year. Though, it has been marginally higher than the normal rainfall (552.6mm) received during this period.

Fig 2: Cumulative Distribution of rainfall



Source: CEIC, Bank of Baroda

Table 2 shows, 23 subdivision, which account for 56% of the total area, have received normal rainfall for cumulative period ranging from 1 Jun-12 Aug'25 and 4 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

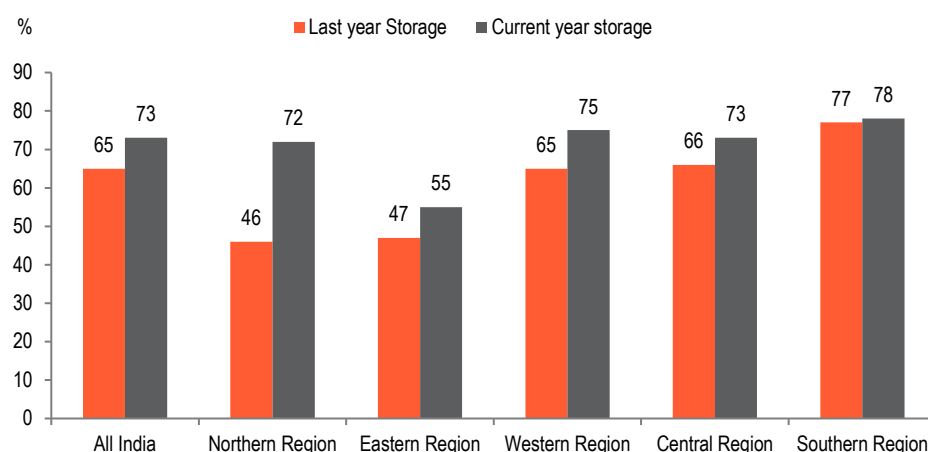
Period (1 Jun 2025-12 Aug 2025)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	0	0
Excess	9	33
Normal	23	56
Deficient	4	11
Large Deficient	0	0
No Rain	0	0

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 73% as on 7 Aug 2025 (65% last year). Reservoir levels continue to be much higher this year when compared with last year, across all the regions. Amongst regions, Southern region continues to register highest reservoir level (78%), followed by Western (75%), Central (73%) and Northern region (72%) along with Eastern region (55%).

Fig 3: Reservoir level across regions



Source: CEIC, Bank of Baroda

Key points to note:

- Cumulatively (1 Jun-12 Aug 2025), India has received 552.7mm rainfall, which is higher than normal and lower than 587.6mm recorded last year during the same period.
- Acreage of pulses, rice, and coarse cereals have registered an improvement, while that of oilseeds and cotton has seen a dip (YoY basis) till 8 Aug 2025.
- Water reservoir levels is higher than last year, with All India reservoir at 73% of the total storage capacity versus 65% last year during the same period.

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