

1 Aug 2026

Jahnvi Prabhakar
Economist

Monsoon and Sowing: Update

South West monsoon has advanced but continues to remain below normal rainfall at 13% below LPA till 31 Jul 2026 on a cumulative basis. This has resulted in lower sown area of kharif crops compared with last year. Pulses, rice and coarse cereals have registered lower acreage. Out of 36, 19 sub-divisions (57% of the country) have received normal to excess rainfall during this period, while 16 states are in the deficient zone. Region-wise, a broad based deviation has been noted across all the regions. East and North eastern India reported deficient rainfall (-30%), followed by Southern Peninsula (-23%) and North Western (-12%) while central region (4%) have reported normal rainfall. There is a clear reversal seen in rainfall after being in the deficient zone in the month of Jun'26 to being in surplus for the month of Jul'26 (1% above LPA) reflecting the deluge. Even as El Nino concerns continue to hover, revival in monsoon with better distribution could be a positive for food inflation in the near term and requires careful monitoring as we head towards the second half of the Southwest monsoon.

Where does Kharif sowing stand?

As of 31th Jul 2026, overall sown area has declined by 2.9% compared with last year and bringing actual sown area to 81% of the normal area sown. The acreage of coarse cereals and rice have registered a weaker growth of 7.5% and 2.2% respectively. Lower sown area has also been noted for pulses, with slower growth noted in moong (-9.3%) and arhar (-9.2%). On the positive side, urad sowing registered higher growth at 10.7% for the same period. Additionally, higher sown area has been noted for sugarcane and oilseeds, even though soybean sowing was marginally lower than last year levels. In contrast, lower acreage has also been noted for cotton as it declined by (-) 2.4% for the same period.

Table 1: Kharif Sowing

	Area sown in 2025-26 (lakh ha)	Area sown in 2026- 27 (Lakh ha)	Growth (YoY %)
Coarse Cereals	170.6	157.7	(7.5)
Rice	308.4	301.5	(2.2)
Pulses	101.6	95.2	(6.3)
Oilseeds	171.1	172.3	0.7
Cotton	106.1	103.5	(2.4)
Sugarcane	56.7	57.6	1.5
Jute and Mesta	6.2	6.3	1.9
All Crops	920.7	894.2	(2.9)

Source: CEIC, Bank of Baroda | Data as of 31 Jul 2025

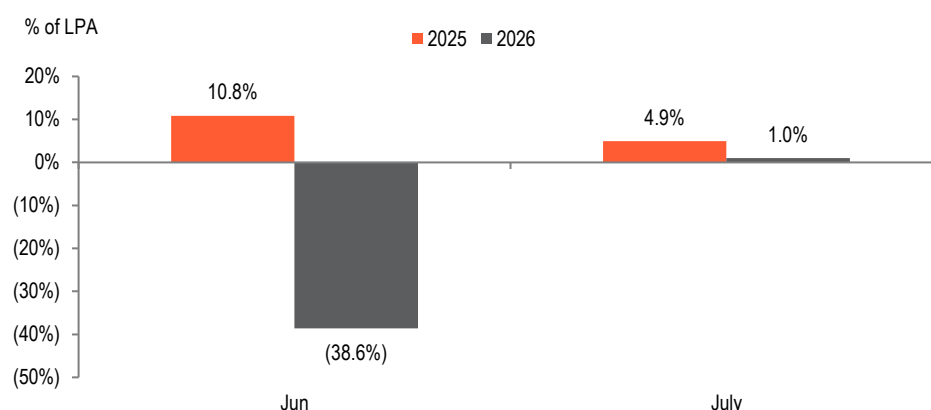
Monsoon:

For the period 1 Jun to 31 Jul 2026, South West Monsoon is 13% below LPA compared with last year.

- Major part of the Western and Central region such as Gujarat, Madhya Pradesh and Maharashtra have been witnessing normal rainfall during this period.
- Some states in Southern and Northern belt continue to remain in the deficient zone.
- IMD expects below normal rainfall in the second leg of the Southwest monsoon (94% of LPA), with strengthening of moderate El Nino conditions.

Overall cumulative rainfall this year has been lower at 389.8mm, compared with 474.3 mm last year. It was also lower than the normal rainfall (445.8mm) received during this period. Month wise (Fig 2), in Jun'26 it was 39% below LPA against a surplus of 10.8% above LPA for last year. Interestingly, there has been surplus rains in the month of Jul'26 alone, defying the possible risk of El Nino.

Fig 1: Distribution of rainfall-month wise



Source: CEIC, Bank of Baroda

Table 2 shows, 16 subdivision, which account for 46% of the total area, have received normal rainfall for cumulative period ranging from 1 Jun-31 Jul'26 and 17 sub-divisions have received deficient rainfall. Amongst states, there are 17 states that have received normal rainfall during this period.

Table 2: Subdivision wise distribution of Rainfall

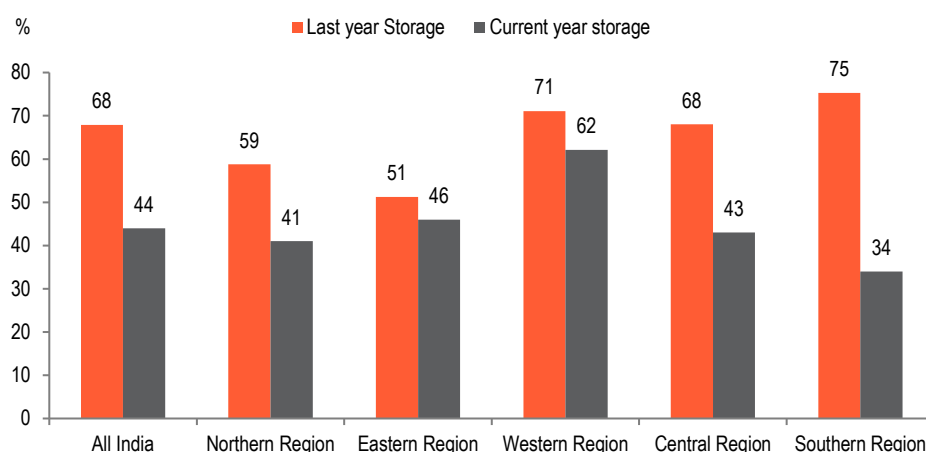
Period (1 Jun -31 Jul 2026)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	0	0
Excess	3	11
Normal	16	46
Deficient	17	43
Large Deficient	0	0
No Rain	0	0

Source: IMD, Bank of Baroda

Reservoir storage status:

In terms of storage (Fig 2), the storage level for 166 reservoir as a % of total capacity stands at 44% as on 30 Jul 2026 (67.9% last year). Reservoir levels continue to be much lower this year when compared with last year, across all the regions. Amongst regions, Western region has the highest reservoir level (62%), followed by Eastern (46%), Central (43%) and Northern region (41%) along with Southern region (34%).

Fig 2: Reservoir level across regions



Source: CEIC, Bank of Baroda

Key points to note:

- Cumulatively (1 Jun-31 Jul 2026), India has received 389.8mm rainfall, which is lower than normal and even lower than 474.3mm recorded last year during the same period.
- This implies South-west monsoon is 13% below LPA compared to last year.
- Acreage of pulses, rice, and coarse cereals have registered a decline, while that of oilseeds and sugar has seen an improvement (YoY basis) till 31 Jul 2025.
- Water reservoir levels is lower than last year, with All India reservoir at 44% of the total storage capacity versus 67.9% last year during the same period.

Disclaimer

The views expressed in this research note are personal views of the author(s) and do not necessarily reflect the views of Bank of Baroda. Nothing contained in this publication shall constitute or be deemed to constitute an offer to sell/ purchase or as an invitation or solicitation to do so for any securities of any entity. Bank of Baroda and/ or its Affiliates and its subsidiaries make no representation as to the accuracy; completeness or reliability of any information contained herein or otherwise provided and hereby disclaim any liability with regard to the same. Bank of Baroda Group or its officers, employees, personnel, directors may be associated in a commercial or personal capacity or may have a commercial interest including as proprietary traders in or with the securities and/ or companies or issues or matters as contained in this publication and such commercial capacity or interest whether or not differing with or conflicting with this publication, shall not make or render Bank of Baroda Group liable in any manner whatsoever & Bank of Baroda Group or any of its officers, employees, personnel, directors shall not be liable for any loss, damage, liability whatsoever for any direct or indirect loss arising from the use or access of any information that may be displayed in this publication from time to time.

Visit us at www.bankofbaroda.com



For further details about this publication, please contact:

Economics Research Department
Bank of Baroda
chief.economist@bankofbaroda.com