

Monsoon and Sowing: Update

South West monsoon advanced resulting in above normal rainfall at 6% above LPA till 21 Jul 2025. This has pushed sown area of kharif crops higher compared with last year. Pulses, rice and coarse cereals have registered higher acreage. Out of 36, 25 sub-divisions (68% of the country) have received normal to excess rainfall during this period, while 9 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 (-23%), followed by Southern Peninsula (-5%) while central (22%) and North Western regions (29%) have reported above normal rainfall. Favorable monsoon supported by strong kharif sowing and higher reservoir storage will continue to aid food inflation in the near term.

Where does Kharif sowing stand?

As of 18th Jul 2025, overall sown area has improved by 4.1% compared with last year. Total sown area of coarse cereals and rice have registered a robust growth of 13.6% and 12.4% respectively. Higher acreage has also been noted for pulses, with double digit growth noted in moong. In contrast, lower sown area has been noted for oilseeds owing to soybean. Additionally, lower acreage has also been noted for both cotton and jute and mesta which has declined by (-) 3.4% and (-) 2.1% respectively for the same period.

Table 1: Kharif Sowing

	Area sown in 2024-25 (lakh ha)	Area sown in 2025- 26 (Lakh ha)	Growth (YoY %)
Coarse Cereals	117.66	133.65	13.6
Rice	157.21	176.68	12.4
Pulses	80.13	81.98	2.3
Oilseeds	162.8	156.76	(3.7)
Cotton	102.05	98.55	(3.4)
Sugarcane	54.88	55.16	0.5
Jute and Mesta	5.65	5.53	(2.1)
All Crops	680.38	708.31	4.1

Source: CEIC, Bank of Baroda | Data as of 18 Jul 2025

Monsoon:

For the period 1 Jun 2025 to 21 Jul 2025, South West Monsoon is 6% above LPA compared with last year.

- Major part of the Northern and Central region such as Madhya Pradesh, Haryana, Uttar Pradesh and Rajasthan have been witnessing heavy rainfall during this period.
- Even some states in Southern belt continue to remain in the excess zone such as Kerala, Karnataka, Tamil Nadu and Andhra Pradesh
- Eastern and North Eastern region of the country have reported deficient rainfall, with states like Bihar, Manipur, Assam, Nagaland and Meghalaya.
- As per NOAA, the conditions of ENSO neutral are likely to persist through Aug-Sep'25. IMD expects neutral IOD conditions over the Indian Ocean, with heavy rainfall expected in North West region in the coming 2-weeks.

Fig 1: Distribution pattern of South-West Monsoon

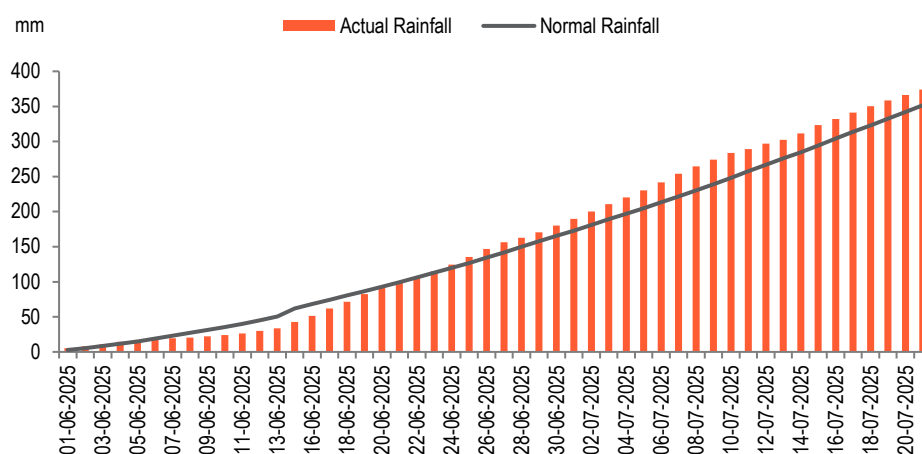


Source: IMD, Bank of Baroda Research | Period from 1 Jun-21 Jul 2025

- 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 higher at 374mm, compared with 347 mm last year. It is also been higher than the normal rainfall (351.7mm) received during this period.

Fig 2: Cumulative Distribution of rainfall



Source: CEIC, Bank of Baroda

Table 2 shows, 17 subdivision, which account for 48% of the total area, have received normal rainfall for cumulative period ranging from 1 Jun-21 Jul'25 and 8 sub-divisions have received deficient rainfall. Amongst states, there are 19 states that have received normal rainfall during this period.

Table 2: Subdivision wise distribution of Rainfall

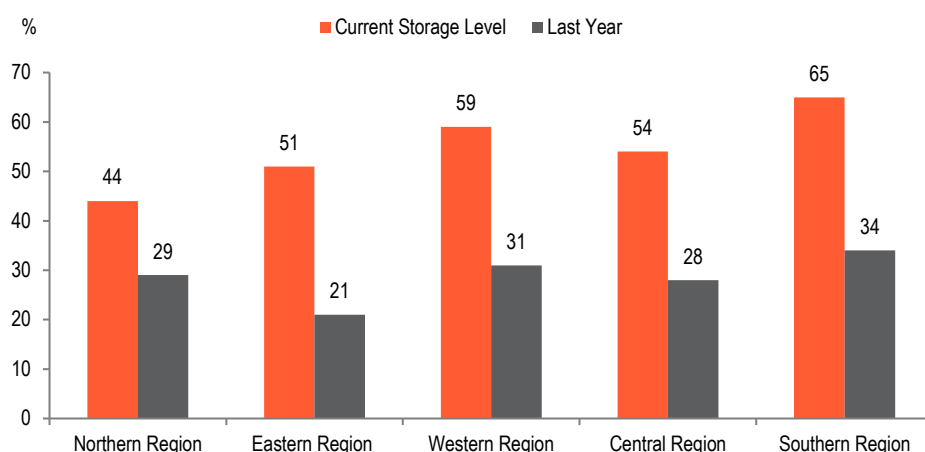
Period (1 Jun 2025-21 Jul 2025)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	3	15
Excess	8	20
Normal	17	48
Deficient	8	17
Large Deficient	0	0
No Rain	0	0

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 57% as on 18 Jul 2025 (29% last year). Reservoir levels continue to be much higher this year when compared with last year, across all the regions. Amongst regions, Southern region has the highest reservoir level (65%), followed by Western (59%), Central (54%) and Eastern region (51%) along with Northern region (44%).

Fig 3: Reservoir level across regions



Source: CEIC, Bank of Baroda

Key points to note:

- Cumulatively (1 Jun-21 Jul 2025), India has received 374mm rainfall, which is higher than normal and even higher than 347mm recorded last year during the same period.
- This implies South-west monsoon is 6% above LPA compared to last year.
- Acreage of pulses, rice, and coarse cereals have registered an improvement, while that of oilseeds and cotton has seen a dip (YoY basis) till 18 Jul 2025.
- Water reservoir levels is higher than last year, with All India reservoir at 57% of the total storage capacity versus 29% last year during the same period.

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