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Monsoon and Sowing: Update

All India cumulative seasonal rainfall is 1% above LPA as of 23 Jul 2024. The distribution of rainfall has pushed kharif sowing higher compared with last year. Acreage of pulses, rice and oilseeds have registered an improvement. On distribution of rainfall, region wise both Central (8%) and Southern peninsula (26%) have registered surplus rainfall, while Eastern (-13%) and North West (-15%) region have reported lower rainfall. Out of 36, 28 sub-divisions (79% of the country) have received normal or above normal rainfall during this period, while 10 states are in the deficient zone. Distribution of rainfall needs careful monitoring along with sowing of Kharif crops. Any shortage or excess might play a significant role on prospects of agriculture growth.

Where does Kharif sowing stand?

As of 19th Jul 2024, overall sown area has improved by 3.5% compared with last year. Notably, the acreage of pulses (22%), rice (6.7%), and oilseeds (8%) has risen. Within pulses, steep rise has been registered in sown area of Arhar and Moongbean. However, the sown area of urad has declined marginally. Moreover, the sown area of coarse cereals has fallen compared with last year. Within cereals, sowing area of crops such as Bajra (-27.4%) and Jowar (-2.6%) has declined the most. In case of oilseeds, sown area of both groundnut (12.6%) and soybean (9.3%) jumped sharply. Sown area of cotton and jute has been lower this year.

Table 1: Kharif Sowing

	Normal Area- Lakh ha (2024)	Area sown in 2023-24 (lakh ha)	Area sown in 2024-25 (Lakh ha)	Growth (YoY %)
Coarse Cereals	181.0	134.9	123.7	(8.3)
Paddy	401.6	155.7	166.1	6.7
Pulses	136.0	70.1	85.8	22.0
Oilseeds	190.2	150.9	163.1	8.0
Cotton	129.3	105.7	102.0	(3.0)
Sugarcane	55.4	57.1	57.7	1.1
Jute and Mesta	6.7	6.03	5.6	(6.5)
All Crops	1100.2	680.4	704.0	3.5

Source: CEIC, Bank of Baroda | Data as of 19 Jul 2024

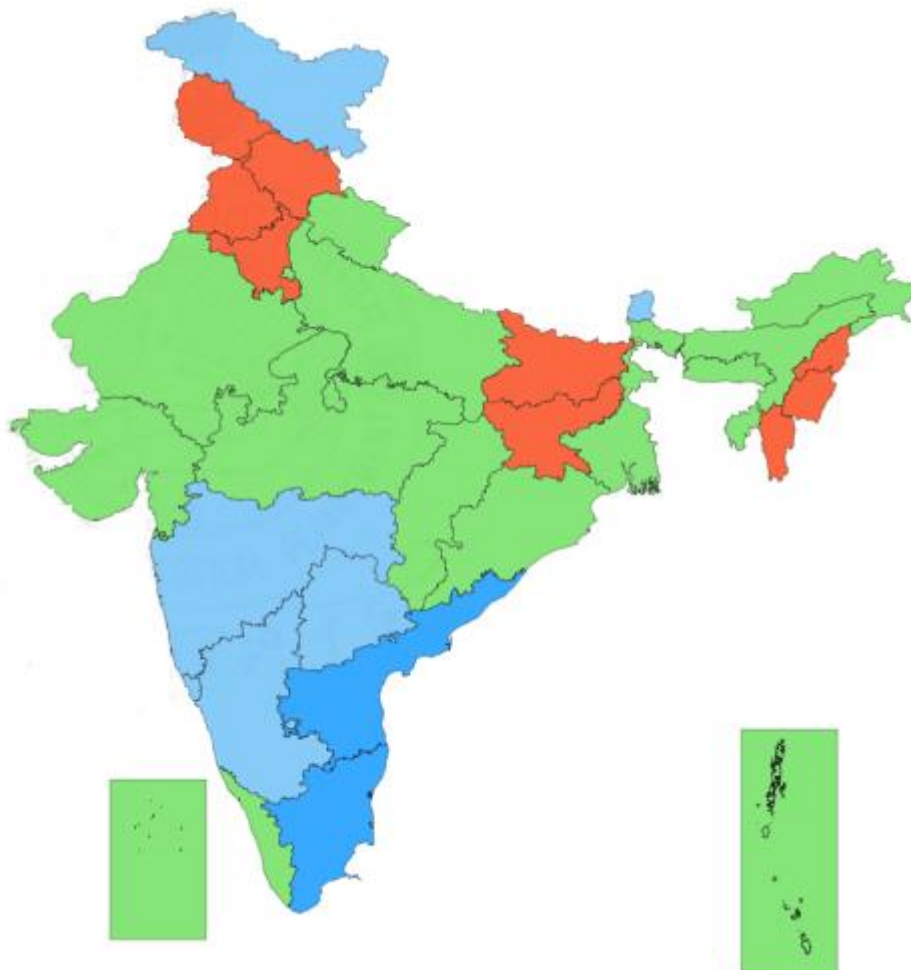
Monsoon:

For the period 1 Jun 2024 to 23 Jul 2024, South West Monsoon is 1% above LPA compared with last year.

- A large part of the country, specifically, Central, Western and Eastern regions have received normal rainfall so far. These include states like Uttar Pradesh, Madhya Pradesh Gujarat, Rajasthan, Odisha and West Bengal.

- Excessive rainfall has been registered in the following states Maharashtra, Andhra Pradesh, Karnataka, Tamil Nadu and Telangana.
- In contrast, states such as Bihar, Jharkhand, Haryana, Punjab, Himachal Pradesh and some states in North east such as Manipur as well as Mizoram have noted deficient rainfall till 23 Jul 2024.

Fig 1: Distribution pattern of South-West Monsoon

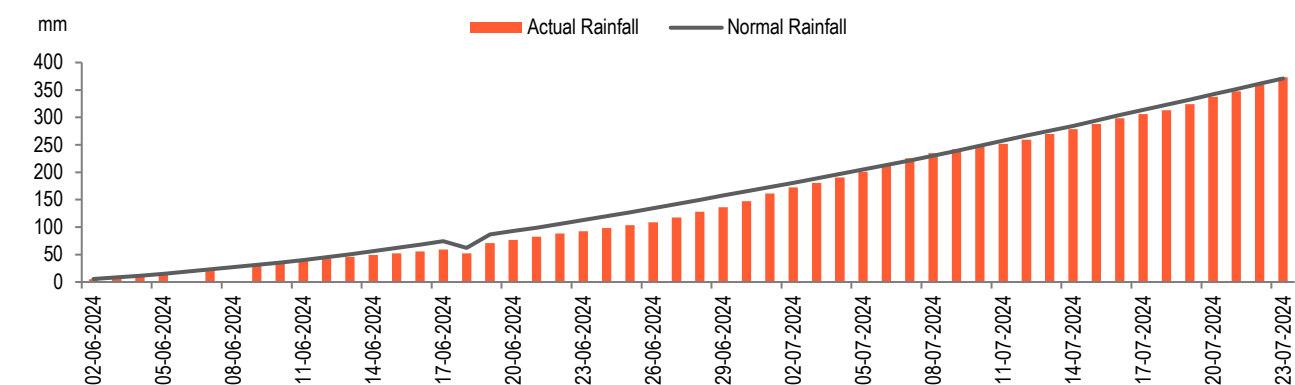


Source: IMD, Bank of Baroda Research | Period from 1 Jun-23 Jul 2024

■ 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 this year remains marginally on the lower side so far at 373.2mm, compared with 389.2mm last year. It is also slightly higher than the normal rainfall (370.9mm) received during this period.

Fig 2: Cumulative Distribution of rainfall



Source: CEIC, Bank of Baroda

Table 2 shows, 28 subdivision, which account for 79% of the total area, have received normal or above rainfall for cumulative period ranging from 1 Jun-23 Jul'24 and 8 sub-divisions have received deficient rainfall. Amongst states, there are 10 states that have received deficient rainfall during this period.

Table 2: Subdivision wise distribution of Rainfall

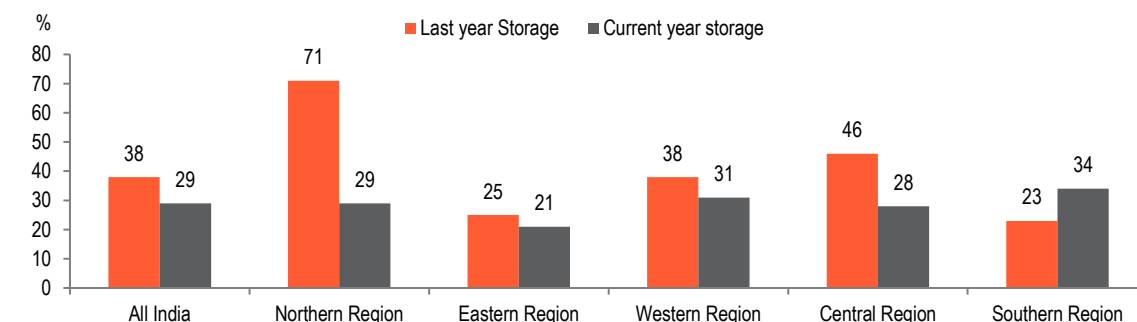
Period (1 Jun 2024-23 Jul 2024)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	2	6
Excess	11	26
Normal	15	47
Deficient	8	21
Large Deficient	0	0
No Rain	0	0

Source: IMD, Bank of Baroda

Reservoir storage status:

In terms of storage (Fig 3), the reservoir level as a % of total capacity stands at 29% as on 18 Jul 2024 (38% last year). Reservoir levels are much lower this year when compared with last year, across all the regions, with the exception of Southern region (34%). Amongst regions, Western region have the highest reservoir level (31%), followed by Northern region (29%), Central (28%) and Eastern region (21%).

Fig 3: Reservoir level across regions



Source: Central Water Commission, Bank of Baroda

Key points to note:

- Cumulatively (1 Jun-23 Jul 2024), India has received 373.2mm of actual rainfall, which slightly higher than normal (370.9mm) and lower than 389.2mm recorded last year during the same period.
- This implies South-west monsoon is 1% above LPA compared to last year.
- Sown area of paddy, pulses and oilseeds have seen an improvement (YoY basis) till 19 Jul 2024.
- Water reservoir levels remains lower than last year, with All India reservoir at 29% of the total storage capacity versus 38% last year during the same period.

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