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Monsoon and Sowing: Update

Southwest monsoon on a cumulative basis was under normal category with rainfall at 13% below LPA till 4 Sep 2026. This has resulted in lower sown area of kharif crops, which is drawing to a close soon. Rice and coarse cereals have registered lower acreage, while pulses sowing has improved. Out of 36, 17 sub-divisions (49% of the country) have received normal to excess rainfall during this period, while 16 states are in the deficient zone. Region-wise, a deviation has been noted across all the regions. Southern Peninsula reported deficient rainfall (-26%), followed by East and North Eastern India (-24%) while North Western (-9%) and central region (-5%) have reported normal rainfall. Moderate El Nino conditions are currently prevailing as per the IMD and are projected to strengthen in the remaining period of the season. As we head towards the last leg of the monsoon, the focus would be on spatial distribution which could have an impact on final kharif acreage and food inflation in the near term.

Where does Kharif sowing stand?

As of 4th Sep 2026, overall sown area has declined by 1.5% compared with last year and bringing actual sown area to 98.3% of the normal area sown. The acreage of coarse cereals and rice have registered a weaker growth of (-) 0.6% and (-) 3.7% respectively. Lower sown area has also been noted for oilseeds, with slower growth noted in soybean (-0.9%) and groundnut (-1.6%). Cotton and sugarcane sowing has also been lowered for the same period. On the positive side, acreage of pulses has improved with higher sowing for both tur (1.6%) and urad (12%). Additionally, higher acreage has also been noted for jute and mesta up by 1.7% 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	182.5	181.4	(0.6)
Rice	438.2	421.8	(3.7)
Pulses	115.3	117.1	1.6
Oilseeds	193.1	192.0	(0.6)
Cotton	109.9	109.2	(0.6)
Sugarcane	58.9	58.5	(0.7)
Jute and Mesta	6.2	6.3	1.7
All Crops	1286.5	1267.7	(1.5)

Source: CEIC, Bank of Baroda | Data as of 04 Sep 2026

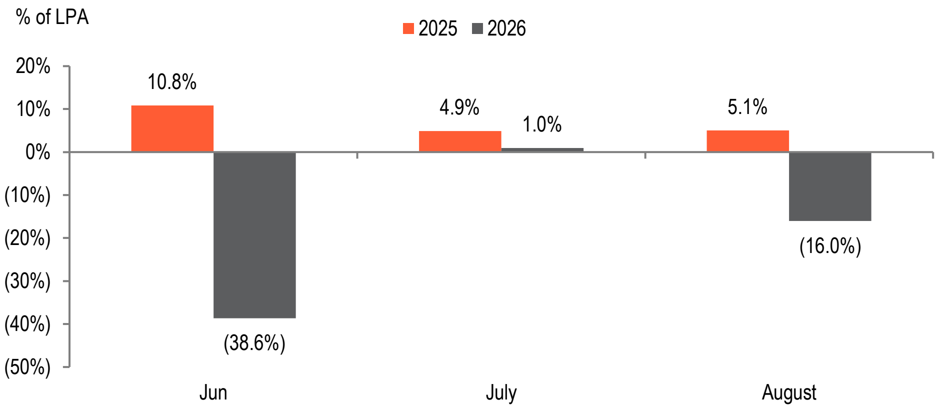
Monsoon:

For the period 1 Jun to 04 Sep 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.
- Given the influence of low-pressure area, IMD has projected heavy rainfall in Central and Northern region, including Madhya Pradesh, Uttar Pradesh and Rajasthan. These are expected to last through 10th Sep.
- In the next coming days, the Southern peninsular region is expected to witness scattered to widespread rains.

Overall cumulative rainfall this year has been lower at 629.7mm, compared with 791.8 mm last year. It was also lower than the normal rainfall (727.9mm) received during this period. Month wise (Fig 1), in Aug'26 it was 16% below LPA against 5.1% above LPA for last year.

Fig 1: Distribution of rainfall-month wise



Source: CEIC, Bank of Baroda

Table 2 shows, 16 subdivisions, which account for 44% of the total area, have received normal rainfall for cumulative period ranging from 1 Jun-4 Sep'26 and 19 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

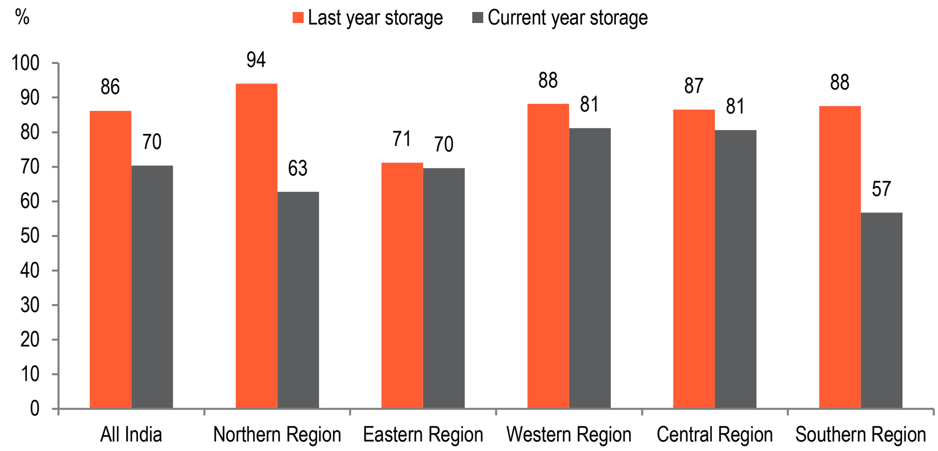
Period (1 Jun -4 Sep 2026)	No. of Subdivisions	Sub divisional % area of Country
Large Excess	0	0
Excess	1	5
Normal	16	44
Deficient	19	51
Large Deficient	0	0
No Rain	0	0

Source: IMD, Bank of Baroda

<u>Reservoir storage status:</u>

In terms of storage (Fig 2), the storage level for 178 reservoirs as a % of total capacity stands at 70% as on 03 Sep 2026 (86% last year). Reservoir levels continue to be much lower this year when compared with last year, across all the regions. Amongst regions, Western and Central regions have the highest reservoir level, which is 81% for both the regions, followed by Eastern (70%), Northern (63%) and Southern region (57%).

Fig 2: Reservoir level across regions



Source: CEIC, Bank of Baroda

Key points to note:

- Cumulatively (1 Jun-4 Sep 2026), India has received 629.7mm rainfall, which is lower than normal and even lower than 791.8mm recorded last year during the same period.
- This implies South-west monsoon is 13% below LPA compared to last year.
- Acreage of rice, oilseeds and coarse cereals have registered a decline, while that of pulses and Jute & Mesta has seen an improvement (YoY basis) till 4 Sep 2026.
- Water reservoir level is lower than last year, with All India reservoir at 70% of the total storage capacity versus 86% last year during the same period.

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