

Monsoon and Sowing: Update

Advancement of South-West monsoon has resulted in cumulative rainfall at 6% above LPA as of 5 Aug 2022. The actual rainfall for this period is though less than the past year levels. There is a growing concern as Eastern region continues to receive deficient rainfall. Sown area of pulses and oilseeds have declined. Even rice is lagging behind on the back of geographical disparities. Out of 36, 6 subdivisions have received deficient rainfall during this period and 6 states are in the deficient zone. On storage levels, the southern states continue to record higher storage levels as the region continues to receive bountiful rains. The higher storage levels is good for rabi sowing.

Where does Kharif sowing stand?

As of 5th Aug 2022, sown area of cotton (5.3%) and oilseeds (0.6%) has improved compared with last year. Total sown area of coarse cereals has also risen by 3.9% led by Bajra (15%). For pulses, sowing area has declined by 2.5% from last year. Within pulses, Arhar (-10.4%) and Urad (-6%) sowing area has registered a dip, while that of Moong (2.5%) has improved. Area sown for Jute and Mesta has also declined by 1%.

Table 1: Kharif Sowing

	Area sown in 2022-23 (mn ha)	Area sown in 2021-22 (mn ha)	Growth (YoY %)
Cereals	37.4	40.2	(7.1)
Rice	23.2	26.7	(13.3)
Pulses	11.6	11.9	(2.5)
Oilseeds	17.5	17.4	0.6
Cotton	11.8	11.2	5.3
Sugarcane	5.5	5.4	0.2
Jute and Mesta	0.7	0.7	(1.0)

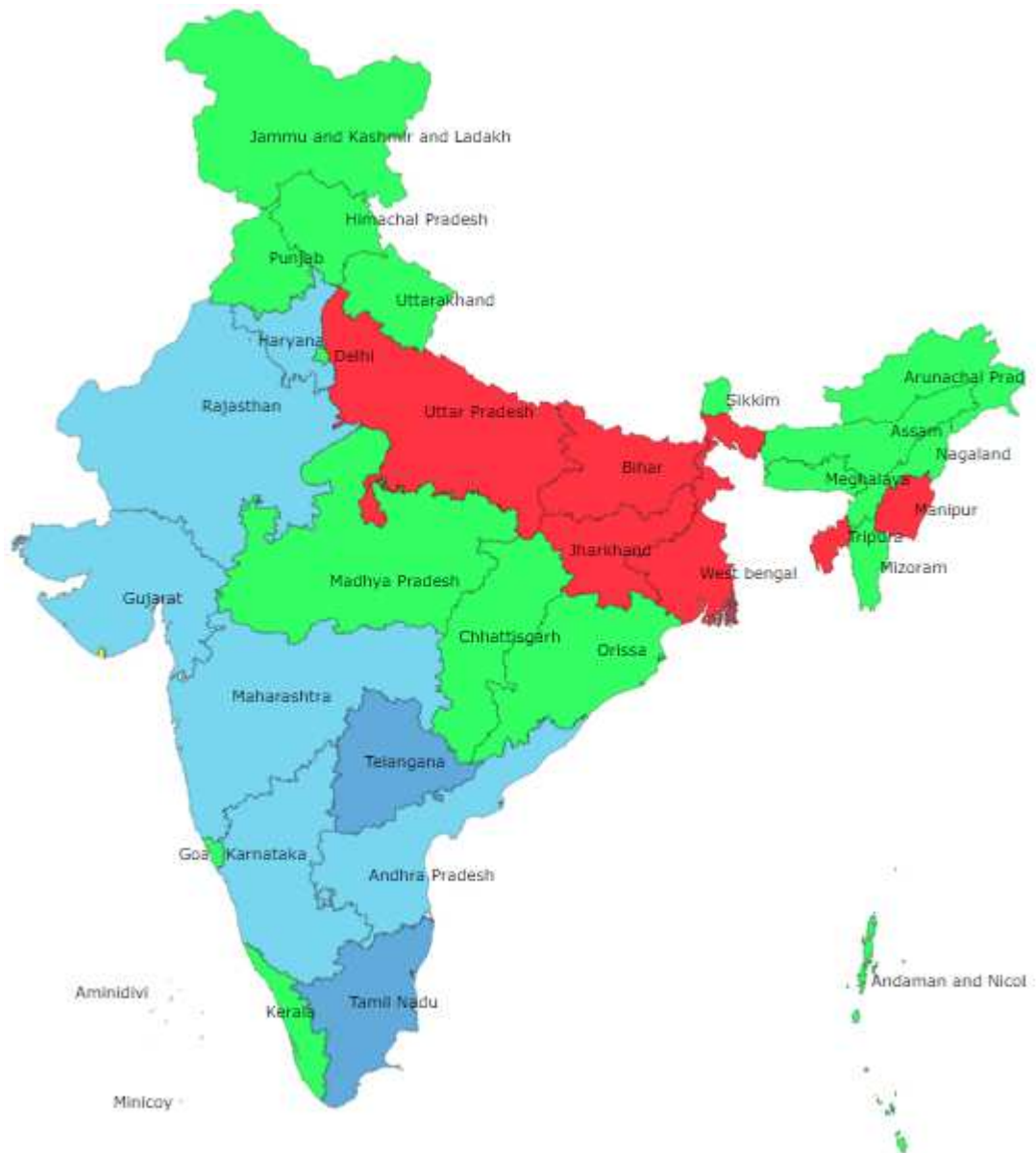
Source: CEIC, Bank of Baroda | Data as of 5 Aug 2022 for pulses, oilseeds, cotton and Jute and Mesta. For others, data as of 29 Jul 2022

Monsoon:

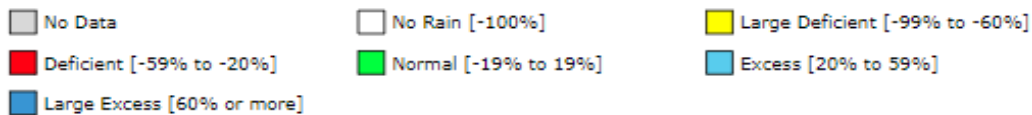
For the period 1 Jun 2022 to 5 Aug 2022, South West Monsoon is 6% above LPA compared with last year.

- North Eastern Belt and the Northern region including Punjab, Himachal Pradesh, Jammu & Kashmir have received normal rainfall. Kerala too have been receiving normal rains.
- Western region of India including states such as Rajasthan, Gujarat and Maharashtra have received excess rainfall. Furthermore states such as Telangana, Karnataka, and Tamil Nadu too have registered excess rainfall.
- On the other hand, following states including Delhi, Uttar Pradesh, Bihar, Jharkhand and West Bengal have been lagging behind other states and have received deficient rainfall.

Fig 1: Distribution pattern of South-West Monsoon

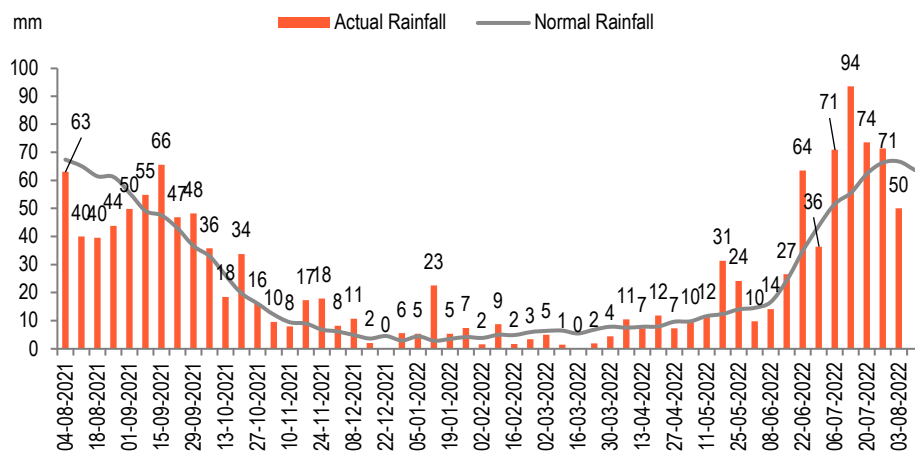


Source: IMD, Bank of Baroda Research | Period from 1 Jun-5 Aug 2022.



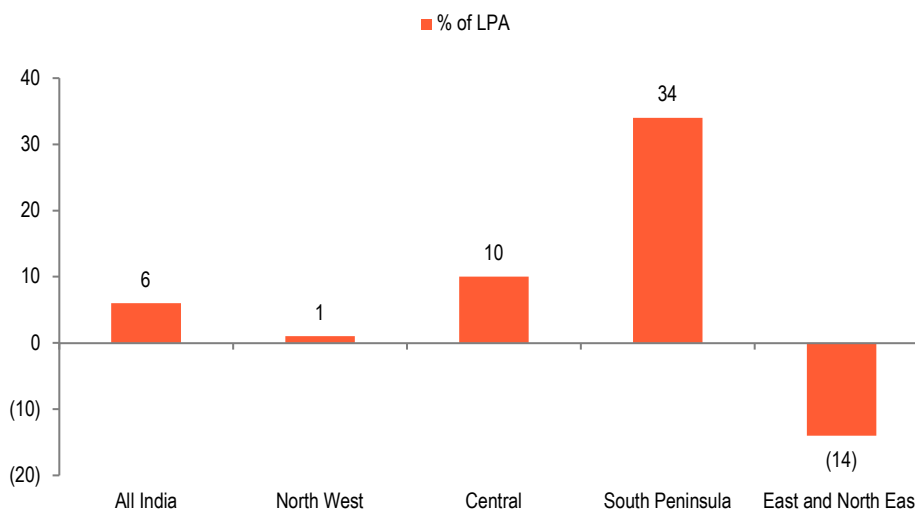
In Fig 2, actual rainfall this year has been comparatively less than last year (50mm versus 63mm). It is also lower than the normal rainfall which currently stands at 63.7mm. Fig 3, explains regions wise distribution of rainfall. East and North Eastern region continue to witness lower rainfall (-14% of LPA), while other regions are in green with Southern Peninsula (34% of LPA) and Central region (10% above LPA) receiving heavy rainfall.

Fig 2: Weekly distribution of rainfall



Source: CEIC, Bank of Baroda

Fig 3: Region-wise deviation of rainfall



Source: CEIC, Bank of Baroda

In the table 2, mentioned below, over 6 subdivisions have received deficient rainfall for cumulative period ranging from 1 Jun-5 Aug'22. Amongst states too, there are over 6 states that have received deficient rainfall during this period.

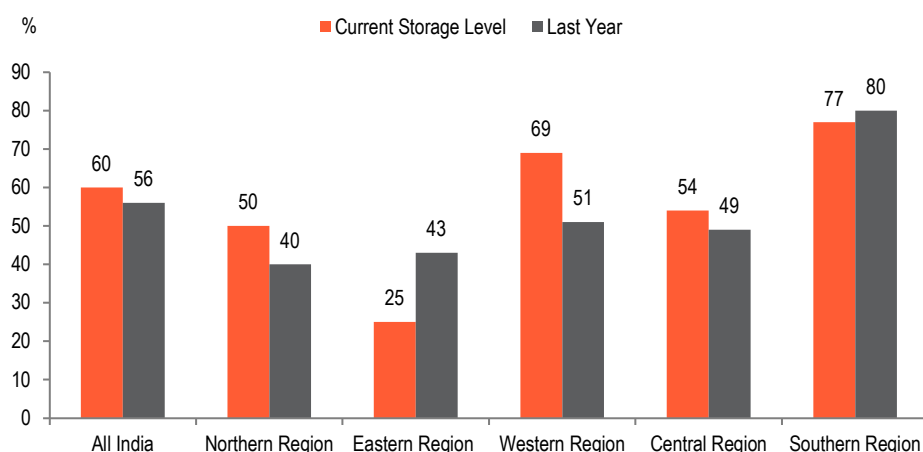
In terms of storage (Fig 4), the reservoir level as a % of total capacity stands at 60% as of 4 Aug 2022 compared with 56% last year. Amongst regions, Southern region has the highest reservoir level (77% against 80% last year), followed by Western (69% versus 51% last year), Central (54% against 49%), Northern (50% against 40%) and Eastern region (25% versus 43% last year).

Table2: Subdivision wise distribution of Rainfall

Period (1 Jun 2022-5 Aug 2022)	No. of Subdivisions	Subdivisional % area of Country
Large Excess	3	13%
Excess	12	33%
Normal	15	37%
Deficient	6	17%
Large Deficient	0	0%
No Rain	0	0%

Source: IMD, Bank of Baroda

Fig 4: Region-wise deviation of rainfall



Source: Central Water Commission, Bank of Baroda

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