

Steady show

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The advancement of the Southwest monsoon remained steady as the number of divisions with deficient/scanty rainfall remained at 4 and weighted average rainfall continued to remain at 5.5% over week ended August 22, 2008. The key takeaways of our analysis upto 22nd August are as under:

- The weighted average rainfall across the country remained steady at 5.5% above normal for week ended August 20, 2008
- In the rain dependent areas the weighted average rainfall continued to pick up well as it's now 2.7% above the normal
- The total rainfall till date is now 74.3% of the normal (see *table IV*) rainfall for the full season compared with 75.4% for the corresponding period last year.
- The sowing (see *table V*) has been delayed due to delayed advancement of the monsoon. The area under cultivation is down for most of the crops except for rice. For rice, the area under cultivation has gone up by 10% over last year. However, as the monsoon has become near normal since mid-August, a pick up in cultivation is expected from thereon.
- **Number of divisions with deficient or scanty rainfall has remained steady at 4 for week ended August 20, 2008.**
- The downside risks to the agriculture sector have reduced to minimal except for a threat of floods in certain areas.
- **The precipitation graph for next one week is indicating a VERY GOOD rainfall over north and north eastern states while the activity is likely to remain DULL over rest of the country for week ended August 27, 2008.**

TABLE – I: Advancement of southwest monsoon

% deviation to normal	02-Jul-08	09-Jul-08	16-Jul-08	23-Jul-08	30-Jul-08	06-Aug-08	13-Aug-08	20-Aug-08
Well Irrigated areas	152.9	119.9	83.8	69.7	49.7	38.3	31.5	35.5
Adequately Rain-fed areas	-12.3	-18.6	-20.6	-21.2	-18.5	-17.0	-12.9	-12.3
Rain Dependent Areas	26.2	8.7	3.0	-4.9	-2.5	-0.7	4.9	2.7
India	29.5	15.7	9.0	2.9	2.4	2.4	5.9	5.5

TABLE – II: Distribution of rainfall

No of divisions	02-Jul-08	09-Jul-08	16-Jul-08	23-Jul-08	30-Jul-08	06-Aug-08	13-Aug-08	20-Aug-08
Excess	18	13	14	9	7	9	8	9
Normal	10	10	8	12	20	20	24	23
Deficient/Scanty	8	13	14	15	9	7	4	4

Source: Indian Meteorological Department, Emkay Research

TABLE – III: Distribution of rainfall during southwest monsoon till August 20, 2008

Division	From June 1 to					
	August 20, 2008			August 22, 2007		
	Actual (MM)	Normal (MM)	Deviation (%)	Actual (MM)	Normal (MM)	Deviation (%)
Well Irrigated areas	676	499	35.5	402	515	-22.0
East Uttar Pradesh	864	621	39.1	534	640	-16.6
West Uttar Pradesh	678	538	26.0	383	552	-30.6
Haryana, Chandigarh and Delhi	426	324	31.5	248	346	-28.3
Punjab	522	356	46.6	307	367	-16.3
Adequately Rain-fed areas	1,323	1,509	-12.3	1,556	1,539	1.1
Konkan and Goa region	2,392	2,265	5.6	2,453	2,304	6.5
coastal Karnataka	2,275	2,670	-14.8	2,729	2,716	0.5
Kerala	1,255	1,762	-28.8	2,096	1,791	17.0
sub-Himalayan West Bengal and Sikkim	1,574	1,402	12.3	1,455	1,430	1.7
Assam & Meghalaya	1,129	1,410	-19.9	1,168	1,443	-19.1
Nagaland, Manipur, Mizoram and Tripura	654	911	-28.2	858	930	-7.7
Arunachal Pradesh	1,200	1,335	-10.1	1,082	1,365	-20.7
Uttaranchal	952	892	6.7	1,186	918	29.2
Andaman & Nicobar Islands	1,297	1,178	10.1	1,073	1,203	-10.8
Lakshadweep	703	751	-6.4	1,025	764	34.2
Rain Dependent Areas	546	531	2.7	612	546	12.1
Gangetic West Bengal	950	760	25.0	1,312	780	68.2
Orissa	955	805	18.6	995	826	20.5
Jharkhand	850	751	13.2	863	771	11.9
Bihar	896	705	27.1	940	728	29.1
Himachal Pradesh	546	569	-4.0	416	584	-28.8
Jammu & Kashmir	447	372	20.2	437	382	14.4
west Rajasthan	255	191	33.5	161	197	-18.3
east Rajasthan	466	445	4.7	406	461	-11.9
West Madhya Pradesh	544	630	-13.7	668	647	3.2
East Madhya Pradesh	796	784	1.5	539	805	-33.0
Gujarat region	683	688	-0.7	920	701	31.2
Saurashtra and Kutch	325	376	-13.6	682	381	79.0
madhya Maharashtra	423	500	-15.4	637	509	25.1
Marathwada	271	458	-40.8	307	475	-35.4
Vidarbha	589	702	-16.1	787	722	9.0
Chattisgarh	801	856	-6.4	760	883	-13.9
coastal Andhra Pradesh	441	355	24.2	455	367	24.0
Telangana region	613	525	16.8	421	541	-22.2
Rayalaseema	189	210	-10.0	383	218	75.7
north interior Karnataka	231	299	-22.7	408	307	32.9
south interior Karnataka	507	476	6.5	661	486	36.0
Tamil Nadu and Pondicherry	189	163	16.0	194	170	14.1
India	629	596	5.5	638	612	4.3
Excess/Normal/Deficient/Scanty	No of divisions			No of divisions		
Excess	8			14		
Normal	24			16		
Deficient/Scanty	4			6		

Source: Indian Meteorological Department, Emkay Research

TABLE – IV: Rainfall till date as % of full season

Division	From June 1 to					
	August 20, 2008			August 22, 2007		
	Aug 20 2008	Full season	% of FS	Aug 22, 2007	Full season	% of FS
Well Irrigated areas	676	723.3	93.4	402	723.3	55.6
East Uttar Pradesh	864	914.0	94.5	534	914.0	58.4
West Uttar Pradesh	678	773.0	87.7	383	773.0	49.5
Haryana, Chandigarh and Delhi	426	470.0	90.6	248	470.0	52.8
Punjab	522	502.0	104.0	307	502.0	61.2
Adequately Rain-fed areas	1,323	1,959.3	67.5	1,556	1,959.3	79.4
Konkan and Goa region	2,392	2,802.0	85.4	2,453	2,802.0	87.5
coastal Karnataka	2,275	3,174.0	71.7	2,729	3,174.0	86.0
Kerala	1,255	2,143.0	58.6	2,096	2,143.0	97.8
sub-Himalayan West Bengal and Sikkim	1,574	1,955.0	80.5	1,455	1,955.0	74.4
Assam & Meghalaya	1,129	1,885.0	59.9	1,168	1,885.0	62.0
Nagaland, Manipur, Mizoram and Tripura	654	1,241.0	52.7	858	1,241.0	69.1
Arunachal Pradesh	1,200	1,835.0	65.4	1,082	1,835.0	59.0
Uttaranchal	952	1,223.0	77.8	1,186	1,223.0	97.0
Andaman & Nicobar Islands	1,297	1,755.0	73.9	1,073	1,755.0	61.1
Lakshadweep	703	985.0	71.4	1,025	985.0	104.1
Rain Dependent Areas	546	768.5	71.0	612	768.5	79.7
Gangetic West Bengal	950	1,136.0	83.6	1,312	1,136.0	115.5
Orissa	955	1,165.0	82.0	995	1,165.0	85.4
Jharkhand	850	1,093.0	77.8	863	1,093.0	79.0
Bihar	896	1,039.0	86.2	940	1,039.0	90.5
Himachal Pradesh	546	774.0	70.5	416	774.0	53.7
Jammu & Kashmir	447	514.0	87.0	437	514.0	85.0
west Rajasthan	255	263.0	97.0	161	263.0	61.2
east Rajasthan	466	624.0	74.7	406	624.0	65.1
West Madhya Pradesh	544	904.0	60.2	668	904.0	73.9
East Madhya Pradesh	796	1,097.0	72.6	539	1,097.0	49.1
Gujarat region	683	934.0	73.1	920	934.0	98.5
Saurashtra and Kutch	325	486.0	66.9	682	486.0	140.3
madhya Maharashtra	423	700.0	60.4	637	700.0	91.0
Marathwada	271	704.0	38.5	307	704.0	43.6
Vidarbha	589	976.0	60.3	787	976.0	80.6
Chattisgarh	801	1,206.0	66.4	760	1,206.0	63.0
coastal Andhra Pradesh	441	575.0	76.7	455	575.0	79.1
Telangana region	613	767.0	79.9	421	767.0	54.9
Rayalaseema	189	381.0	49.6	383	381.0	100.5
north interior Karnataka	231	491.0	47.0	408	491.0	83.1
south interior Karnataka	507	659.0	76.9	661	659.0	100.3
Tamil Nadu and Pondicherry	189	316.0	59.8	194	316.0	61.4
India	629	846.2	74.3	638	846.2	75.4

Source: Indian Meteorological Department, Emkay Research

Full season is normal rainfall from June 1 to September 30

TABLE – V: Area under cultivation (million hectares)

Crop	Monsoon 2008-09	Monsoon 2007-08	% yoy change	Normal for full season	Current as % of normal
Rice	28.21	25.64	10.0	39.12	72.1
Coarse cereals	17.11	19.41	-11.8	22.65	75.5
Bajra	6.74	7.61	-11.4	9.18	73.4
Maize	6.31	6.98	-9.6	6.37	99.1
Jowar	2.64	3.11	-15.1	4.21	62.7
Pulses	8.98	10.57	-15.0	10.87	82.6
Arhar	2.95	3.38	-12.7	3.46	85.3
Urad	1.86	2.32	-19.8	2.53	73.5
Moong	2.19	2.93	-25.3	2.62	83.7
Oilseeds	16.39	16.45	-0.4	15.90	103.1
Groundnut	4.81	5.00	-3.8	5.36	89.8
Soybean	9.28	8.60	7.9	7.25	127.9
Cash crops					
Cotton	8.59	9.07	-5.3	8.37	102.6
Sugarcane	4.41	5.30	-16.8	4.15	106.3
Jute	0.74	0.83	-10.8	0.82	89.8

Source: Ministry of agriculture, newspaper articles, Emkay Research

Normal is average of full season between 2001-06

TABLE –VI: State wise crop pattern

Area - Million Hectares (FY06)	Rice	Wheat	Coarse Cereals	Jowar	Bajra	Maize	Major Pulses	Gram	Tur (Arhar)	Lentil (Masur)
Andhra Pradesh	4.0		1.4	0.4	0.1	0.8	1.8	0.4	0.5	
Assam	2.4	0.1								0.0
Bihar	3.3	2.0	0.7			0.7	0.6	0.1	0.0	0.2
Chhattisgarh	3.8		0.4				1.0	0.2		
Gujarat	0.7	0.9	1.6	0.1	0.9	0.5	0.8	0.2	0.3	
Haryana	1.1	2.3	0.7	0.1	0.6		0.2	0.1		
Himachal Pradesh		0.4	0.3			0.3				
Jammu & Kashmir		0.3	0.4		0.0	0.3				
Jharkhand		0.1	0.2			0.2	0.3		0.1	
Karnataka	1.5	0.3	3.9	1.5	0.4	0.9	2.0	0.4	0.6	
Kerala	0.3									
Madhya Pradesh	1.7	3.7	2.0	0.6	0.2	0.9	4.3	2.6	0.3	0.5
Maharashtra	1.5	0.9	6.9	4.7	1.4	0.5	3.4	1.0	1.1	
Meghalaya										
Orissa	4.5		0.2	0.0			0.8	0.0	0.1	
Punjab	2.6	3.5	0.2			0.2				
Rajasthan		2.1	6.8	0.6	5.0	1.0	3.4	1.1		0.0
Tamil Nadu	2.1		0.7	0.3	0.1	0.2	0.5		0.0	
Uttaranchal		0.4	0.3							
Uttar Pradesh	5.6	9.2	2.2	0.2	0.9	0.8	2.8	0.7	0.4	0.6
West Bengal	5.8	0.4	0.1			0.1	0.2	0.0		0.1
Others	1.7	0.1	0.3	0.0	0.0	0.4	0.4	0.0	0.2	0.1
Total Area under each crop	42.3	26.5	29.1	8.7	9.6	7.6	22.4	6.9	3.6	1.5

Area - Million Hectares (FY06)	Nine Oilseeds	Groundnut	Rapeseed & Mustard	Soyabean	Sunflower	Cotton	Jute & Mesta	Sugar-cane	Total cultivable area
Andhra Pradesh	2.9	1.9		0.1	0.4	1.0	0.1	0.2	11.4
Assam	0.2		0.2				0.1	0.0	2.8
Bihar	0.1		0.1		0.0		0.2	0.1	6.9
Chhattisgarh									5.1
Gujarat	3.0	2.0	0.3			1.9		0.2	9.1
Haryana	0.7		0.7		0.0	0.6		0.1	5.7
Himachal Pradesh									0.7
Jammu & Kashmir									0.6
Jharkhand									0.6
Karnataka	2.9	1.0		0.1	1.4	0.4		0.2	11.1
Kerala									0.3
Madhya Pradesh	5.7	0.2	0.8	4.3		0.6		0.1	18.0
Maharashtra	3.7	0.4		2.4	0.4	2.9	0.0	0.5	19.8
Meghalaya							0.1		0.1
Orissa	0.3	0.1					0.0	0.0	5.8
Punjab	0.1		0.1			0.6		0.1	7.0
Rajasthan	5.3	0.3	3.7	0.7		0.5			18.1
Tamil Nadu	0.7	0.6			0.0	0.1		0.3	4.5
Uttaranchal								0.1	0.8
Uttar Pradesh	1.1	0.1	0.8		0.0			2.2	22.9
West Bengal	0.6		0.4				0.6	0.0	7.7
Others	0.5	0.1	0.2	0.1	0.0	0.1	-0.1	0.0	3.0
Total Area under each crop	27.9	6.7	7.3	7.7	2.3	8.7	0.9	4.2	223.8

Source: Ministry of agriculture, Emkay Research

TABLE –VII: Crop wise update




Probability of good crop	■	Rice			
		Area under cultivation (mn hectares)	Rainfall	Dependency	
		Andhra Pradesh	4.0	Normal	Rain dependent
Probability of normal crop	■	Assam	2.4	Deficient	Adequately rain fed
		Bihar	3.3	Excess	Rain dependent
Probability of bad crop	■	Chhattisgarh	3.8	Normal	Rain dependent
		Orissa	4.5	Excess	Rain dependent
		Punjab	2.6	Excess	Well Irrigated areas
		Uttar Pradesh	5.6	Excess	Well Irrigated areas
		West Bengal	5.8	Excess	Rain dependent
		Others	10.4		
		Total	42.3		

Wheat			
Area under cultivation (mn hectares)	Rainfall	Dependency	
Bihar	2.0	Excess	Rain dependent
Haryana	2.3	Excess	Well Irrigated areas
Madhya Pradesh	3.7	Excess	Rain dependent
Punjab	3.5	Excess	Well Irrigated areas
Rajasthan	2.1	Excess	Rain dependent
Uttar Pradesh	9.2	Excess	Well Irrigated areas
Others	3.7		
Total	26.5		

Coarse Cereals			
Area under cultivation (mn hectares)	Rainfall	Dependency	
Andhra Pradesh	1.4	Normal	Rain dependent
Karnataka	3.9	Normal	Rain dependent
Maharashtra	6.9	Normal	Rain dependent
Rajasthan	6.8	Excess	Rain dependent
Uttar Pradesh	2.2	Excess	Well Irrigated areas
Others	8.0		
Total	29.1		

Jowar			
Area under cultivation (mn hectares)	Rainfall	Dependency	
Andhra Pradesh	0.4	Normal	Rain dependent
Karnataka	1.5	Normal	Rain dependent
Madhya Pradesh	0.6	Excess	Rain dependent
Maharashtra	4.7	Normal	Rain dependent
Rajasthan	0.6	Excess	Rain dependent
Others	0.8		
Total	8.7		

Bajra			
Area under cultivation (mn hectares)	Rainfall	Dependency	
Gujarat	0.9	Normal	Rain dependent
Haryana	0.6	Excess	Well Irrigated areas
Maharashtra	1.4	Normal	Rain dependent
Rajasthan	5.0	Excess	Rain dependent
Uttar Pradesh	0.9	Excess	Well Irrigated areas
Others	0.8		
Total	9.6		




		Maize	Area under cultivation (mn hectares)	Rainfall	Dependency
Probability of good crop		Andhra Pradesh	0.8	Normal	Rain dependent
		Bihar	0.7	Excess	Rain dependent
		Gujarat	0.5	Normal	Rain dependent
Probability of normal crop		Karnataka	0.9	Normal	Rain dependent
		Madhya Pradesh	0.9	Normal	Rain dependent
		Maharashtra	0.5	Normal	Rain dependent
Probability of bad crop		Uttar Pradesh	0.8	Excess	Well Irrigated areas
		Others	2.6		
		Total	7.6		

		Pulses total	Area under cultivation (mn hectares)	Rainfall	Dependency
		Andhra Pradesh	1.8	Normal	Rain dependent
		Karnataka	2.0	Normal	Rain dependent
		Madhya Pradesh	4.3	Excess	Rain dependent
		Maharashtra	3.4	Normal	Rain dependent
		Rajasthan	3.4	Excess	Rain dependent
		Uttar Pradesh	2.8	Excess	Well Irrigated areas
		Others	4.7		
		Total	22.4		

		Gram	Area under cultivation (mn hectares)	Rainfall	Dependency
		Andhra Pradesh	0.4	Normal	Rain dependent
		Karnataka	0.4	Normal	Rain dependent
		Madhya Pradesh	2.6	Excess	Rain dependent
		Maharashtra	1.0	Normal	Rain dependent
		Rajasthan	1.1	Excess	Rain dependent
		Uttar Pradesh	0.7	Excess	Well Irrigated areas
		Others	0.7		
		Total	6.9		

		Tur (Arhar)	Area under cultivation (mn hectares)	Rainfall	Dependency
		Andhra Pradesh	0.5	Normal	Rain dependent
		Gujarat	0.3	Normal	Rain dependent
		Karnataka	0.6	Normal	Rain dependent
		Madhya Pradesh	0.3	Excess	Rain dependent
		Uttar Pradesh	0.4	Excess	Well Irrigated areas
		Others	1.5		
		Total	3.6		

		Lentil (Masur)	Area under cultivation (mn hectares)	Rainfall	Dependency
		Bihar	0.2	Excess	Rain dependent
		Madhya Pradesh	0.5	Excess	Rain dependent
		Uttar Pradesh	0.6	Excess	Well Irrigated areas
		Others	0.2		
		Total	1.5		

		Oilseeds	Area under cultivation (mn hectares)	Rainfall	Dependency
Probability of good crop		Andhra Pradesh	2.9	Normal	Rain dependent
		Gujarat	3.0	Normal	Rain dependent
Probability of normal crop		Karnataka	2.9	Normal	Rain dependent
		Madhya Pradesh	5.7	Excess	Rain dependent
Probability of bad crop		Maharashtra	3.7	Normal	Rain dependent
		Rajasthan	5.3	Excess	Rain dependent
		Others	4.5		
		Total	27.9		




		Groundnut	Area under cultivation (mn hectares)	Rainfall	Dependency
		Andhra Pradesh	1.9	Normal	Rain dependent
		Gujarat	2.0	Normal	Rain dependent
		Karnataka	1.0	Normal	Rain dependent
		Maharashtra	0.4	Normal	Rain dependent
		Tamil Nadu	0.6	Normal	Rain dependent
		Others	0.8		
		Total	6.7		

		Rapeseed & Mustard	Area under cultivation (mn hectares)	Rainfall	Dependency
		Madhya Pradesh	0.8	Excess	Rain dependent
		Rajasthan	3.7	Excess	Rain dependent
		Uttar Pradesh	0.8	Excess	Well Irrigated areas
		Others	2.0		
		Total	7.3		

		Soyabean	Area under cultivation (mn hectares)	Rainfall	Dependency
		Madhya Pradesh	4.3	Excess	Rain dependent
		Maharashtra	2.4	Normal	Rain dependent
		Rajasthan	0.7	Excess	Rain dependent
		Others	0.4		
		Total	7.7		

		Sunflower	Area under cultivation (mn hectares)	Rainfall	Dependency
		Karnataka	1.4	Normal	Rain dependent
		Maharashtra	0.4	Normal	Rain dependent
		Others	0.6		
		Total	2.3		

		Cotton	Area under cultivation (mn hectares)	Rainfall	Dependency
		Andhra Pradesh	1.0	Normal	Rain dependent
		Gujarat	1.9	Normal	Rain dependent
		Haryana	0.6	Excess	Well Irrigated areas
		Madhya Pradesh	0.6	Excess	Rain dependent
		Maharashtra	2.9	Normal	Rain dependent
		Punjab	0.6	Excess	Well Irrigated areas
		Rajasthan	0.5	Excess	Rain dependent
		Others	0.6		
		Total	8.7		

		Jute & Mesta	Area under cultivation (mn hectares)	Rainfall	Dependency
Probability of good crop		Andhra Pradesh	0.1	Normal	Rain dependent
		Assam	0.1	Deficient	Adequately rain fed
Probability of normal crop		Bihar	0.2	Excess	Rain dependent
		Meghalaya	0.1	Deficient	Adequately rain fed
Probability of bad crop		West Bengal	0.6	Excess	Rain dependent
		Others	0.0		
		Total	0.9		
		Sugarcane	Area under cultivation (mn hectares)	Rainfall	Dependency
		Maharashtra	0.5	Normal	Rain dependent
		Tamil Nadu	0.3	Normal	Rain dependent
		Uttar Pradesh	2.2	Excess	Well Irrigated areas
		Others	1.2		
		Total	4.2		

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