

Monsoon picks up but 74% of cultivable area still affected

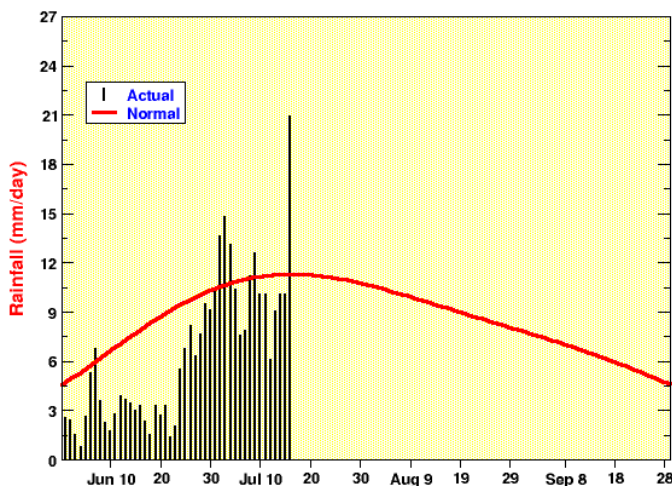
- For week ended 15 July, rainfall was 6% above normal **showing improvement** over past weeks. **But 74% of cultivable area still affected by poor rains.**
- Cumulative rainfall, however, is 27% below normal.
- North India (-54% of Normal rains) and East India (-33% of Normal) were impacted the most by poor monsoon.
- Sowing was completed in 30% of the total Kharif cultivable area, compared with 40% at the same time last year
- Data shows clear signs of a poor Kharif crop.

- The momentum of the Monsoon improved resulting in rain of 6% above long term average for week ending July 15, '09, compared to 8% below normal for week ending July 8. Cumulative rains since June 1 is below normal by 27% of Long period Average (LPA).
- The performance of monsoon during the seventh week can be judged by the fact that this was the first week when the rains were higher than LPA. The past 6 weeks rains were below normal. Of the total of 36 met sub-divisions, 14 had normal to excess rainfall while 22 had deficient to scanty rainfall.
- The cumulative Spatial and Temporal distribution is worse than last year but better than last week.
- **As of July 15, 2009, Water stock in 81 major reservoirs was scanty. This could have a serious impact on irrigation in a year of poor monsoon**
- Total cropped area with deficient rainfall is 74% this year, compared with 22.4% last year in the same period.
- Total cereals area sown under kharif crops as of July 10 was 29% lower, compared with same period last year, Area sown under Rice was 30% below last year.
- Area sown under oil seeds was lower by 35% compared to same period last year while area under cotton was down by 19.6% and sugarcane was also down by 2.9%.

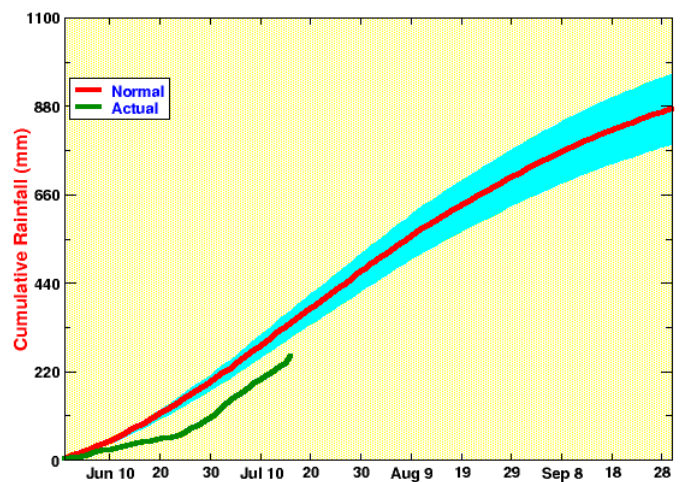
Note: *Rains in the range of +19%/-19% of Long term average are considered Normal.

Monsoon: Momentum picks up

Daily Progress of Monsoon up to Jul 15, 2007

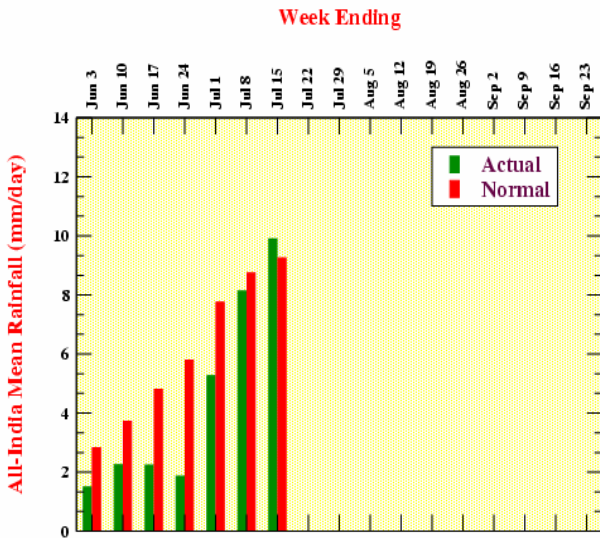


Cumulative Progress of Monsoon since June

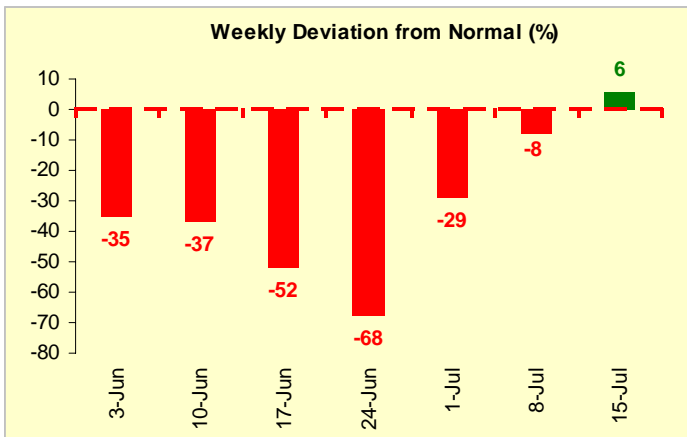
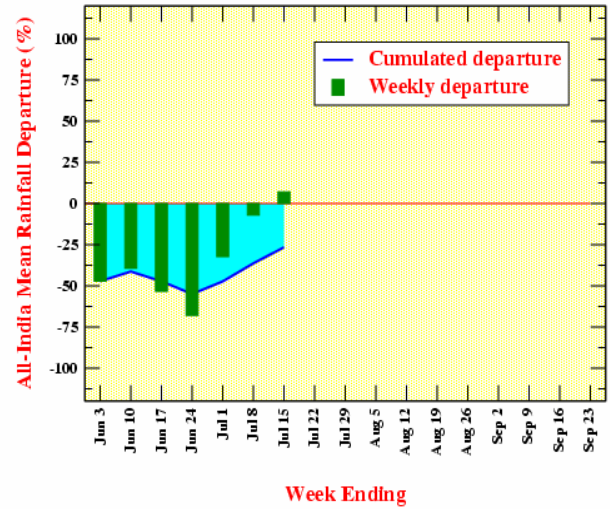


Temporal Distribution (Quantum of Rainfall): Better than last Week but worse than last year

Weekly Evolution of Monsoon



Cumulative Rainfall



Cumulative Rainfall in the Season			
% Deviation from Long Period Average			
1993	0	2001	-9
1994	10	2002	-19
1995	0	2003	2
1996	3	2004	-13
1997	2	2005	-1
1998	5	2006	-1
1999	-4	2007	5
2000	-8	2008	-2
		2009*	-27

* Till 15-Jul-2009
Source: CMIE, IMD

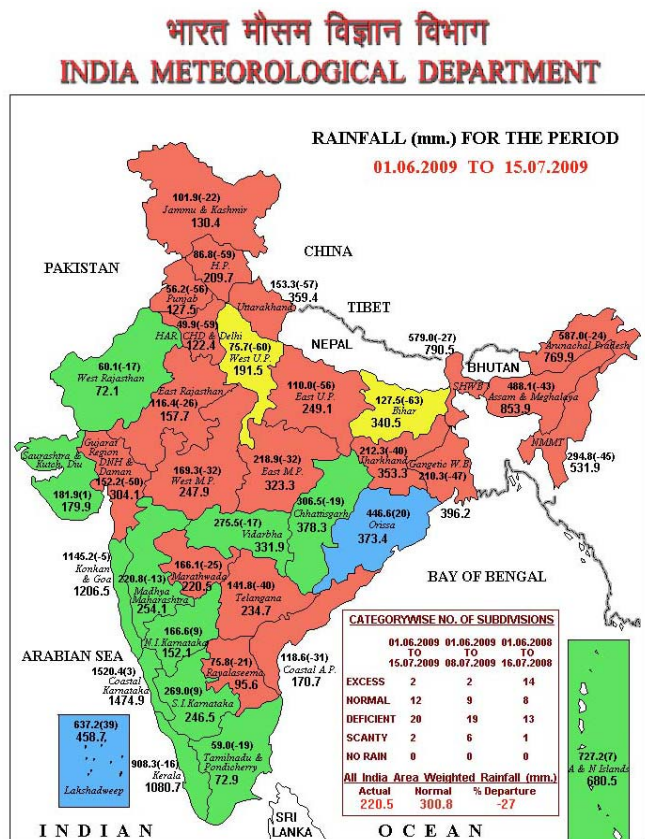
■ A positive deviation from the Long term Average (LPA) this time of 6% is higher than a negative deviation of 8% last Week.

Region-wise Cumulative Rainfall up to Jul 15 (% Deviation from Normal)

	North	West	East	South	All India
2008	63.6%	-14.8%	6.3%	-28.0%	4.0%
2009	-54.3%	-13.9%	-33.2%	-2.5%	-27.0%

Source: IMD, B&K Research

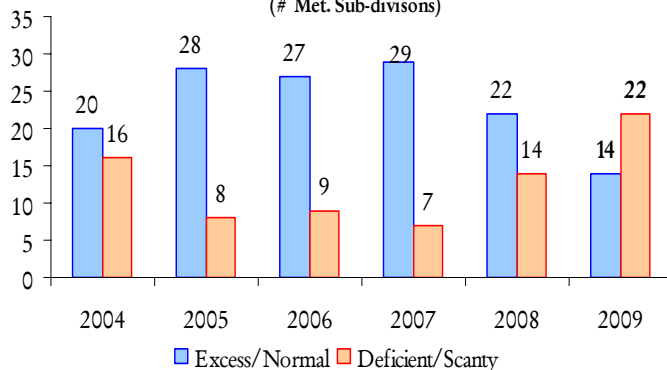
Spatial Distribution (Geographical Spread): Better than last Week but worse than last year



LEGEND: ■ EXCESS (+20% OR MORE) ■ NORMAL (+19% TO -19%) ■ DEFICIENT (-20% TO -59%)
■ SCANTY (-60% TO -99%) ■ NO RAIN (-100%) ■ NO DATA

NOTES:
 (a) Rainfall figures are based on operational data.
 (b) Small figures indicate actual rainfall [mm.], while bold figures indicate Normal rainfall [mm.].
 Percentage Departures of Rainfall are shown in Brackets.

Rainfall Upto Jul 15
(# Met. Sub-divisions)



No. of States with Deviation				
	<=-20	-19 to +19	>= +20	Total
2009	15	7	1	23
2008	8	12	3	23

The performance of monsoon during the seventh week can be judged by analyzing the following: 14 out of 36 sub divisions & 8 out of 23 states received normal or excess rainfall in 2009 compared to 22 out of 36 sub divisions / 15 out of 23 states in 2008. Cropped area affected by deficient rains is lower than that of last Week but worse than last year.

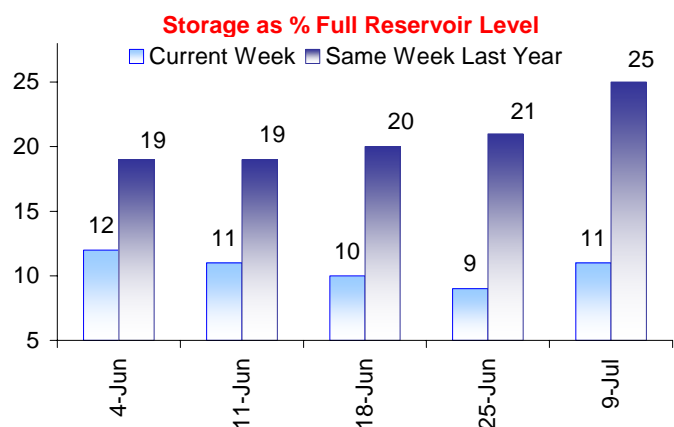
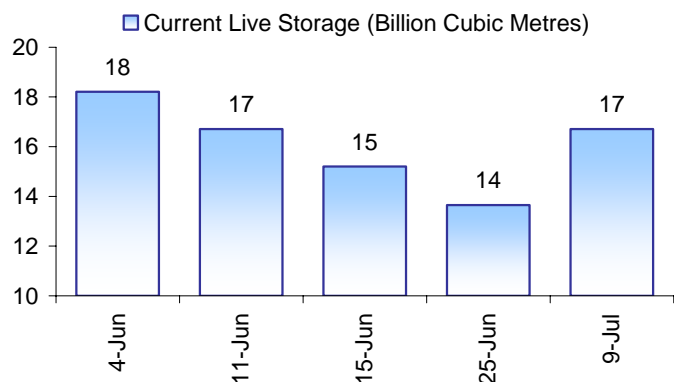
Spatial Distribution Regional Trend - Current Season (% Crop Area Affected)					
	North	West	East	South	All India
Cropped Area*	20.4	40.4	24.4	14.8	100.0
Cropped Area Affected till					
15th Jul '09	100.0	67.3	73.1	55.7	74.0

Source: IMD, B&K Research, Ministry of Agriculture * Based on 2004 Data

States	% Kharif Prod 2004	2009	2008
Uttar Pradesh	14.0	D	D
Rajasthan	9.4	D	N
West Bengal	9.0	D	N
Punjab	8.7	D	D
Andhra Pradesh	7.4	D	N
Maharashtra	7.0	N	N
Orissa	5.6	N	N
Chhattisgarh	4.9	N	N
Bihar	4.9	D	D
Madhya Pradesh	4.7	D	N
Karnataka	4.3	N	N
Gujarat	3.7	N	N
Haryana	3.3	D	D
Tamil Nadu	3.2	N	D
Assam	2.9	D	D
Total Cropped area with Deficient rainfall (%)		74.0	22.4

Note: D=Deficient; N=Normal

Water Reservoirs Storage Status (Up to Jul 10, 2009): **Low storage could affect irrigation**



- As the rains in the country remained deficit since the week ending June 04, live storage in **81 important reservoirs** remained scanty till the week ending July 9, 2009.
- The momentum in the rains corresponded to the poor storage in the reservoirs.

- Overall live storage is at **11% of Full Reservoir level**, which is lower than last year level of 25%.
- There was poor water storage in the reservoirs in the states of Rajasthan, Orissa, West Bengal, Gujarat, Maharashtra and Madhya Pradesh.

Source: Central Water Commission

Kharif Crop Sowing Status (Up to July 10, 2009)

Crop	Normal Area	Area Sown Reported (Lac Hectares)		YoY Change from last year (%)	% of Normal
		This Year	Last Year		
Total Cereals	621.6	140.8	199.6	-29.4	22.7
Total Coarse Cereals	229.6	66.6	93.2	28.5	29.0
Rice	392.0	74.3	106.5	-30.2	19.0
Pulses	111.7	12.5	15.4	-19.1	11.2
Oilseeds	169.1	56.1	86.2	-35.0	33.2
Cotton	87.2	48.1	59.8	-19.6	55.1
Sugarcane	44.0	42.5	43.8	-2.9	96.5
TOTAL	1041.6	306.9	411.9	-25.5	29.5

Source: Ministry of Agriculture

- Sowing completed in **30%** of the total cultivable area compared to **40%** in same period last year.
- Area sown under rice is **19%** of total area which is **30%** below same period last year.
- Sowing of rice has been very poor in Bihar (-62.5%), Chhattisgarh (-78.2%), Jharkhand (-50.5%), MP (-64.6%), West Bengal (-35.0%), Maharashtra (-45%), compared to same period last year.
- Overall sown area under Kharif crops is **25.5%** lower compared to that in last year.

B&K Economic Research

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