USDA Foreign Agricultural Service
GAIN Report
Global Agricultural Information Network

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India

Post: New Delhi

Kharif Planting was Slow as Monsoon was Delayed

Report Categories:

Agriculture in the Economy
Agriculture in the News
Climate Change/Global Warming/Food Security
Policy and Program Announcements
Grain and Feed
Oilseeds and Products
Cotton and Products

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Report Highlights:

Delayed rains and low reservoir levels have led to a ten percent lower *Kharif* crop planting than the normal five year average during the southwest monsoon (June to September). Pan-India rainfall is eight percent below the long-term average, but the forecast of a normal monsoon and its rapid progression across India is expected to support and improve the pace of planting. Additionally, the Government of India announced the Minimum Support Price (MSP) for the 2018/19 *Kharif* season.

General Information:

On May 2, 2018, Indian Meteorological Department (IMD) forecast a normal monsoon in its second long range forecast for the 2018 Southwest Monsoon. IMD forecasts June to September rainfall would likely be 97 percent of the long-period average (LPA) with a model error of plus/minus 4 percent. The forecasts suggests maximum probability for **normal** rainfall during the season (refer to Table 1). For more details please refer to IMD Press Release.

The Southwest Monsoon advanced rapidly and covered the entire country by June 29, two weeks earlier than the normal date of July 15. As a whole, India received normal rainfall from June 1 through July 8 with an eight percent downward departure from the LPA for the southwest monsoon. The most recent IMD forecast envisions rainfall to be 101 percent of the LPA in July, and 94 percent of the LPA in August. September rains will be crucial to determine whether the monsoon is normal as predicted in IMD models.

In addition, IMD forecasts heavy to very heavy rainfall over central India and the southern peninsula over the next five days. Heat wave conditions are likely to prevail over north Rajasthan, south Haryana and northwest Madhya Pradesh during the next 24 hours. Due to likely rainfall activity at many places over Northwest India in the next few days (July 9-11), the maximum temperatures are likely to fall by 2-4 degree Celsius over these regions.

MSP announcement 2018-19 favors pulses and oilseeds

On July 4, 2018, the Government of India announced the Minimum Support Prices (MSP) for *Kharif* crops for the MY 2018/19 season. The MSPs, announced by the Union Budget for 2018-19, are fixed at a level of at least 150 percent of the cost of production. The Commission for Agricultural Costs and Prices (CACP) has recommended MSPs for all *Kharif* crops broadly in line with the announced principle.

MSP prices are announced at the start of the *Kharif* planting season (early June) annually, which along with the monsoon rains influence the planting decisions of the farmers. The delay in announcement of MSP has prompted farmers in Northern India to move forward and plant crops which have assured/stable returns on investment namely rice/paddy and cotton. However, planting decisions may be affected in Central and Southern India. The acreage under pulses (moong/green gram), oilseeds (Niger seed) and cotton may increase significantly as the absolute increase in prices has reached record levels with the announced MSP.

For more details, please refer to: Commission for Agricultural Costs and Prices MSP Recommendations and PIB Press Release - MSP Announcement

Minimum Support Prices (MSP) for *Kharif* Crops of 2018/19 season
(All prices in Rupees per 100 kg)

Commodity	Variety	MSP for 2017-18 Season	MSP approved for 2018-19 Season	Increase		Return*over cost in percent
				Absolute	Percentage	
Paddy	Common	1,550	1,750	200	12.90	50.09
	Grade A	1,590	1,770	180	11.32	51.80
Jowar	Hybrid	1,700	2,430	730	42.94	50.09
	Maldandi	1,725	2,450	725	42.03	51.33
Bajra	-	1,425	1,950	525	36.84	96.97
Ragi	-	1,900	2,897	997	52.47	50.01
Maize	-	1,425	1,700	275	19.30	50.31
Arhar(Tur)	-	5,450	5,675	225	4.13	65.36
Moong	-	5,575	6,975	1,400	25.11	50.00
Urad	-	5,400	5,600	200	3.70	62.89
Groundnut	-	4,450	4,890	440	9.89	50.00
Sunflower Seed	-	4,100	5,388	1,288	31.42	50.01
Soyabean	-	3,050	3,399	349	11.44	50.01
Sesamum	-	5,300	6,249	949	17.91	50.01
Nigerseed	-	4,050	5,877	1,827	45.11	50.01
Cotton	Medium Staple	4,020	5,150	1,130	28.11	50.01
	Long Staple	4,320	5,450	1,130	26.16	58.75

* Includes all paid out costs such as those incurred on account of hired human labor, bullock labor/ machine labor, rent paid for leased land, expenses incurred on use of material inputs like seeds, fertilizers, manures, irrigation charges, depreciation on implements, farm miscellaneous expenses, and the imputed value of family labor.

Table 1. Forecast Probability for Southwest Monsoon 2018

Category	Rainfall Range (% of LPA)	Forecast Probability (%)
Deficient	Less than 90	13
Below Normal	Between 90-96	28
Normal	**Between 96-104**	**43**
Above Normal	Between 104-110	13
Excess	Greater than 110	03

Source: Indian Meteorological Department

Table 2: India: IMD Southwest Monsoon forecast and actual rainfall as percentage of LPA

Year	2nd Stage Forecasted Rainfall	Actual Rainfall	Forecast
	(% of LPA)	(% of LPA)	Probability (%)
2012	96	93	42
2013	98	106	46
2014	93	88	38
2015	88	86	66
2016	106	97	40
2017	98	95	50
2018	97	-	43

Table 3. India: Regional Rainfall Distribution from June 1- July 8, 2018

Regions	2018 Actual (mm)	Normal (mm)*	2018 Percentage Departure from Normal
Northwest India	108.2	112.1	-4%
Central India	229.3	243.8	-6%
Southern Peninsula	235.1	215.5	9%
East and Northeast India	361.0	467.6	-23%
All India	**214.2**	**233.5**	**-8%**

* Normal rainfall is the fifty year average of rainfall from 1951-2000
Source: Indian Meteorological Department

Table 4. India. Storage Status at 91 Major Reservoirs in Billion Cubic Meters (BCM)

Region	Volume on July 5, 2018 (in BCM)	Total Capacity (in BCM)	Percentage of Capacity on July 5, 2018	Percentage of Capacity on July 5, 2017	10-Year Average Capacity Level on July 5
Northern Region	3.00	18.01	17%	30%	31%
Eastern Region	3.17	18.83	17%	44%	18%
Western Region	4.48	31.26	14%	21%	19%
Central Region	9.13	42.30	22%	26%	20%
Southern Region	13.08	51.59	25%	12%	21%
All India	**32.86**	**161.99**	**20%**	**20%**	**21%**

Source: Ministry of Water Resources

Table 5. India. *Kharif* 2017 Sown Area (in million hectares)

Crop	Area Sown in 2017 on July 6, 2018	Area Sown in 2016 on July 6, 2017	Normal Area on July 6**	Y-o-Y Change	Change from Normal
Rice	6.725	7.908	8.565	-15%	-21%
Pulses	3.360	4.167	2.642	-19%	27%
Coarse Cereals	5.735	6.627	5.91	-13%	-3%
Oilseeds	6.359	7.345	7.317	-13%	-13%
Sugarcane	5.044	4.964	4.535	2%	11%
Jute and Mesta	0.693	0.696	0.745	0%	-7%
Cotton	5.460	7.182	7.302	-24%	-25%
Total	**33.376**	**38.889**	**37.016**	**-14%**	**-10%**

Source: Ministry of Agriculture and Farmers Welfare, Government of India
** Normal Area is the five year average of the area from 2011-2015

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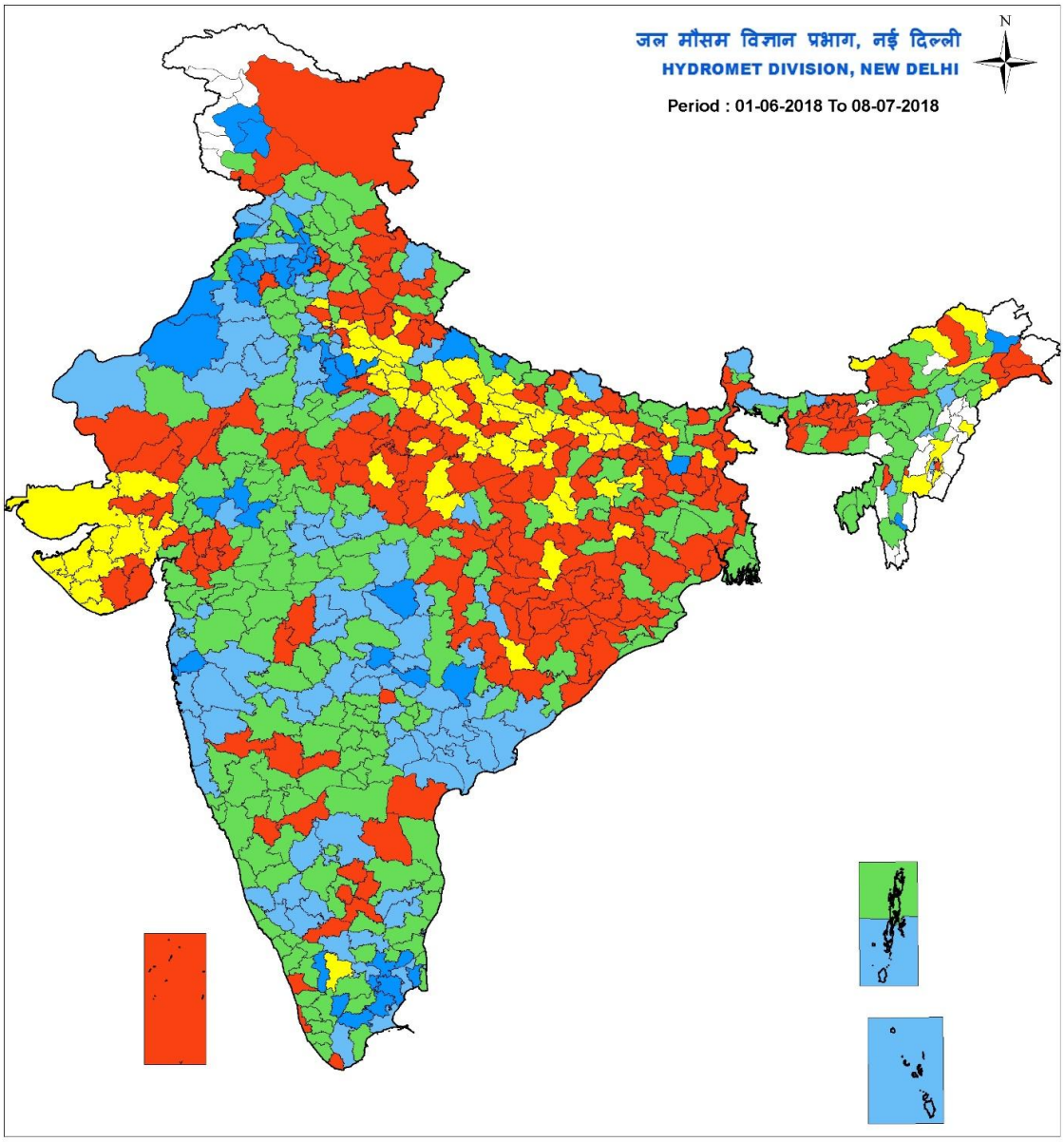
INDIA METEOROLOGICAL DEPARTMENT

DISTRICT RAINFALL MAP



Legend

Large Excess [60% or more] | Excess [20% to 59%] | Normal [-19% to 19%] | Deficient [-59% to -20%] | Large Deficient [-99% to -60%] | No Rain [-100%] | NO DATA

NOTES :
a) RainFall figures are based on operation data.

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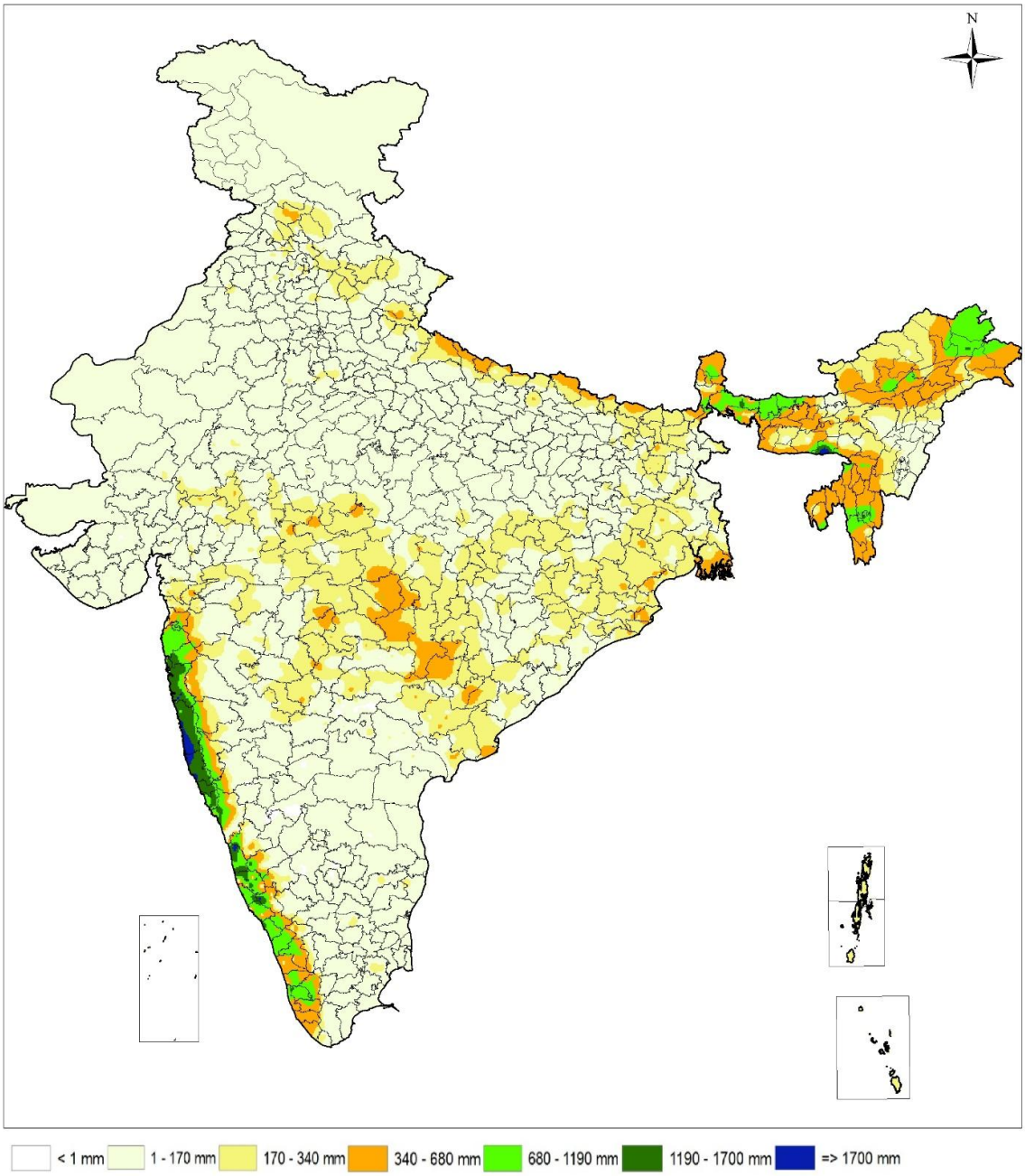
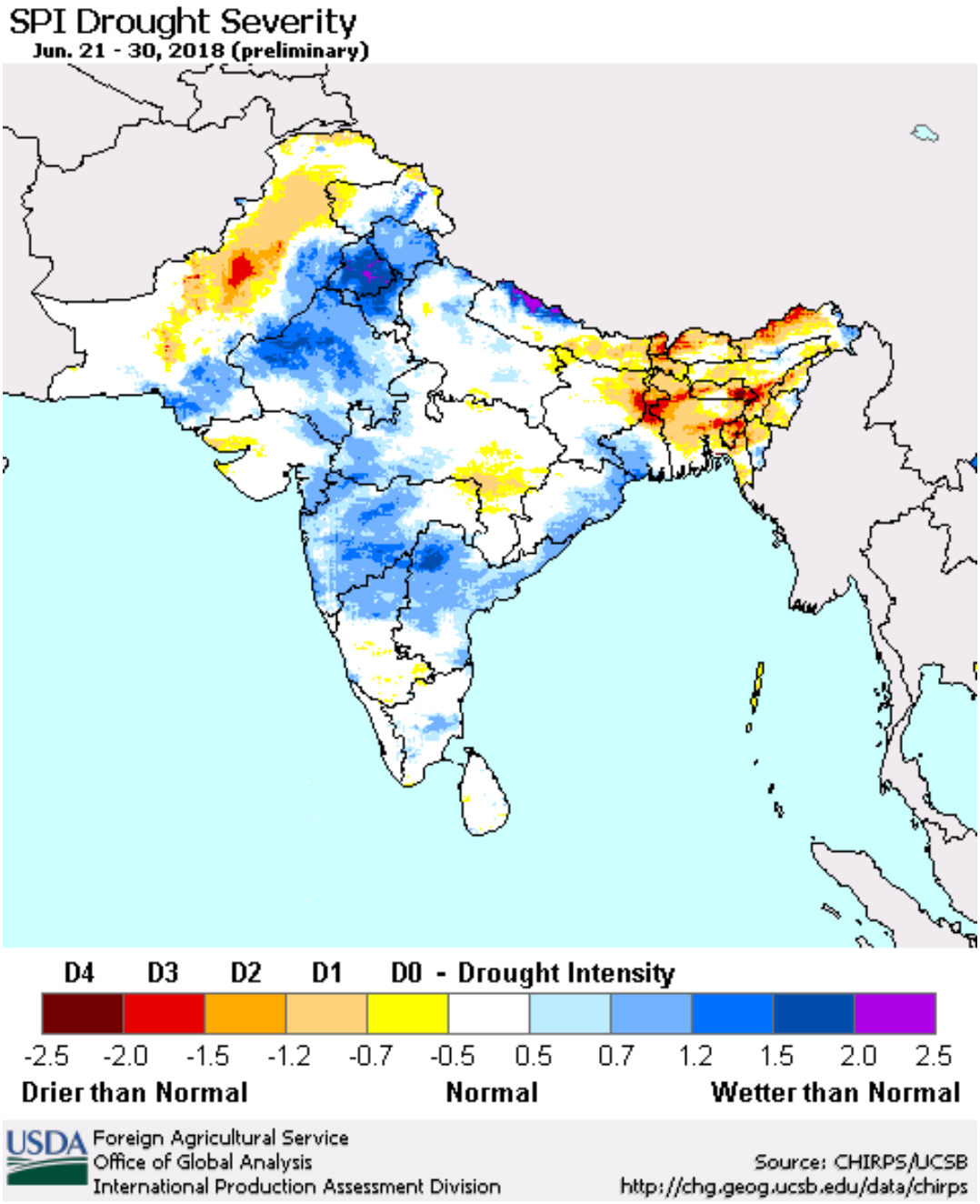
HYDROMET DIVISION, NEW DELHI

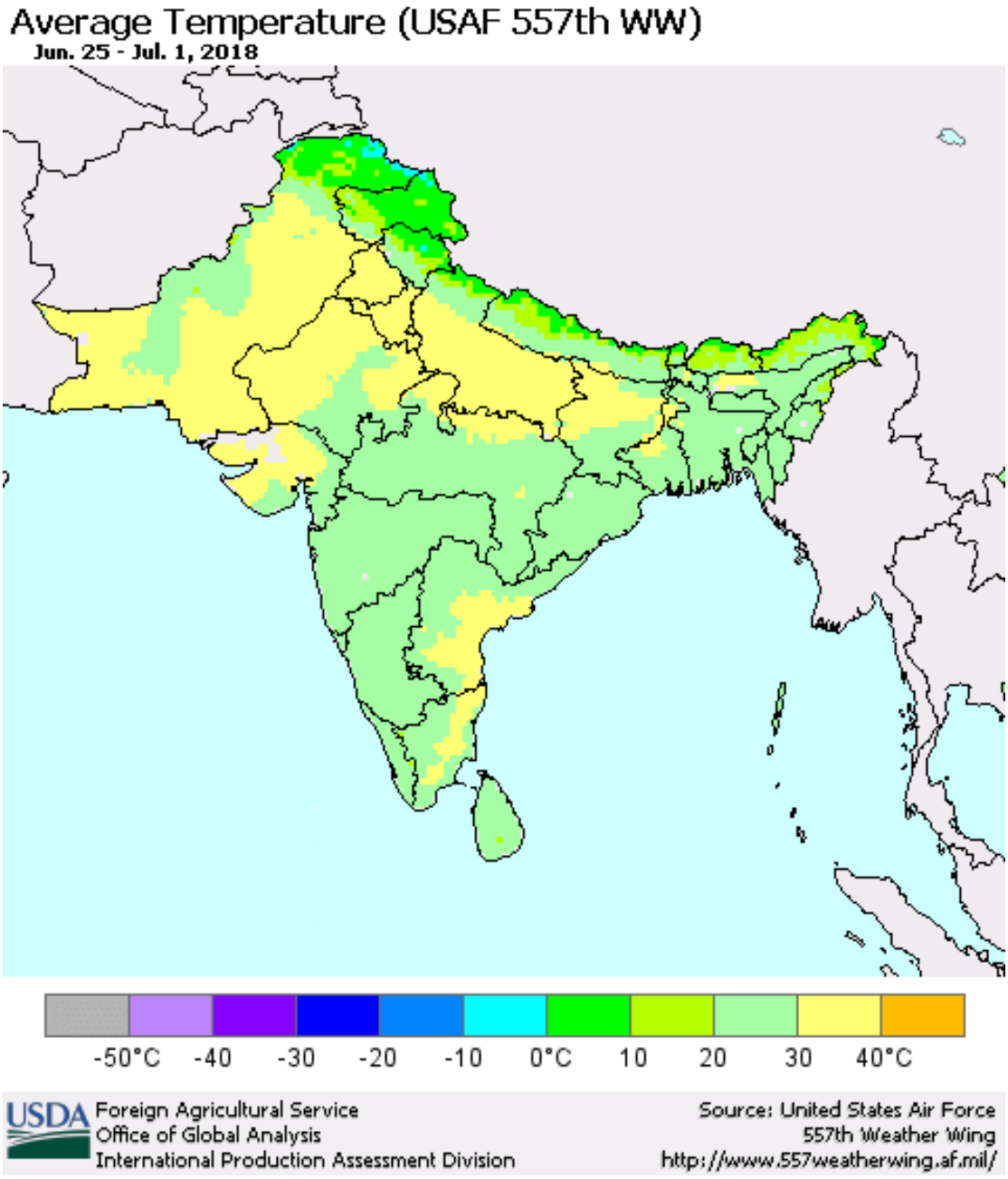
SPATIAL RAINFALL ANALYSIS - CUMULATIVE

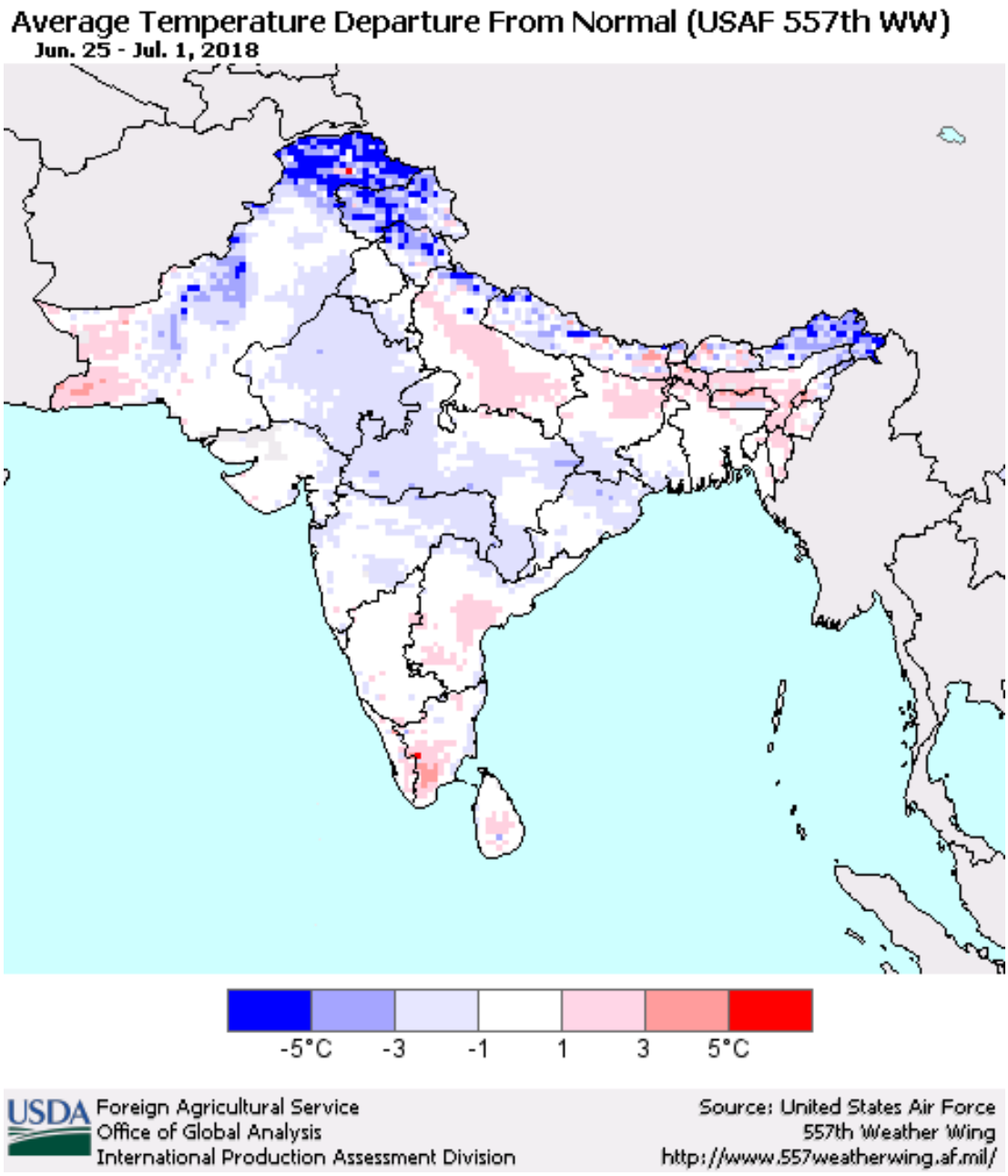
01-06-2018 TO 08-07-2018



Progress of Rainfall in Different Meteorological Sub-divisions of India as on 08-Jul-2018 (Relative departure from normal in %)										
Sl No	Sub Division	01-10 Jun	01-29 Jun	01 Jun-01 Jul	01 Jun-04 Jul	01 Jun-05 Jul	01 Jun-08 Jul	01 June-08 July 2018		
								Actual (mm)	Normal (mm)	Def/ Surp
1	ARUNACHAL PRADESH	-85	-36	-35	-28	-29	-28	469.1	649	-179.9
2	ASSAM & MEGHALAYA	-72	-28	-26	-22	-23	-26	496.7	667.6	-170.9
3	N M M T	-20	-9	-13	-16	-11	-13	452.9	519.7	-66.8
4	SHWB & SIKKIM	-54	-21	-13	3	0	-2	640.9	654.7	-13.8
5	GANGETIC WEST BENGAL	6	-12	-19	-21	-22	-25	249.1	331.1	-82
6	JHARKHAND	-6	-32	-37	-29	-30	-34	184	278.8	-94.8
7	BIHAR	4	-35	-39	-19	-18	-23	193.6	252.2	-58.6
8	EAST UTTAR PRADESH	-38	-58	-59	-40	-42	-48	88.1	169.7	-81.6
9	WEST UTTAR PRADESH	24	-43	-48	-29	-32	-42	72.2	125	-52.8
10	UTTARAKHAND	72	0	-4	1	-4	-14	224	259.9	-35.9
11	HAR. CHD & DELHI	114	43	31	32	29	13	85.7	76.1	9.6
12	PUNJAB	267	101	87	98	85	62	134	82.6	51.4
13	HIMACHAL PRADESH	62	30	19	24	18	6	159.4	150.9	8.5
14	JAMMU & KASHMIR	-12	50	57	52	48	34	132.6	98.8	33.8
15	WEST RAJASTHAN	-60	48	78	37	31	19	60.7	51.1	9.6
16	EAST RAJASTHAN	-21	62	54	25	21	11	116.3	105.1	11.2
17	ODISHA	15	-26	-28	-28	-30	-28	212.9	293.8	-80.9
18	WEST MADHYA PRADESH	39	25	19	6	6	3	174.8	169.6	5.2
19	EAST MADHYA PRADESH	162	-12	-18	-22	-22	-23	168.1	218.8	-50.7
20	GUJARAT REGION	-84	-33	-34	-20	-22	-18	175.7	214.8	-39.1
21	SAURASHTRA & KUTCH	-91	-92	-86	-75	-76	-77	31	134.8	-103.8
22	KONKAN & GOA	117	46	37	36	38	44	1433.9	998.9	435
23	MADHYA MAHARASHTRA	38	11	7	3	5	9	223.8	205.6	18.2
24	MARATHWADA	187	36	27	13	15	18	221	186.6	34.4
25	VIDARBHA	229	18	11	6	13	26	307.7	243.7	64
26	CHHATTISGARH	75	-10	-18	-18	-21	-21	223.1	281.1	-58
27	A & N ISLAND	45	18	17	14	16	13	606.9	536	70.9
28	COASTAL ANDHRA PRADESH	98	8	10	9	10	18	169.2	143.9	25.3
29	TELANGANA	155	29	20	4	13	23	236.4	191.8	44.6
30	RAYALASEEMA	86	-5	-5	-3	-7	-9	78.8	87	-8.2
31	TAMILNADU & PONDICHERY	47	8	21	50	44	34	82.1	61.2	20.9
32	COASTAL KARNATAKA	63	23	11	2	3	13	1319.6	1172.2	147.4
33	N. I. KARNATAKA	110	7	1	-7	-4	-5	128.1	135.5	-7.4
34	S. I. KARNATAKA	91	38	24	7	3	8	218.5	202	16.5
35	KERALA	26	20	11	-2	-5	-4	837.5	869.7	-32.2
36	LAKSHADWEEP	-42	-45	-38	-38	-40	-42	236.4	408.4	-172


SPI Drought Severity
Jun. 21 - 30, 2018 (preliminary)
D4 D3 D2 D1 D0 - Drought Intensity
-2.5 -2.0 -1.5 -1.2 -0.7 -0.5 0.5 0.7 1.2 1.5 2.0 2.5
Drier than Normal
Normal
Wetter than Normal
USDA Foreign Agricultural Service
Office of Global Analysis
International Production Assessment Division
Source: CHIRPS/UCSB
http://chg.geog.ucsb.edu/data/chirps


Average Temperature (USAF 557th WW)
Jun. 25 - Jul. 1, 2018
-50°C -40 -30 -20 -10 0°C 10 20 30 40°C
USDA Foreign Agricultural Service
Office of Global Analysis
International Production Assessment Division
Source: United States Air Force
557th Weather Wing
http://www.557weatherwing.af.mil/


Average Temperature Departure From Normal (USAF 557th WW)
Jun. 25 - Jul. 1, 2018
-5°C
-3
-1
1
3
5°C
USDA Foreign Agricultural Service
Office of Global Analysis
International Production Assessment Division
Source: United States Air Force
557th Weather Wing
http://www.557weatherwing.af.mil/