



**COTTON
ASSOCIATION
OF INDIA**

Established 1921

ISO 9001:2015

COTTON ASSOCIATION OF INDIA

CROP REPORT SEASON 2023-2024

STATEWISE CROP ESTIMATES

INDIAN COTTON BALANCE SHEET



COTTON ASSOCIATION OF INDIA

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PRESS RELEASE

CAI RELEASES ITS FIRST COTTON PRESSING ESTIMATE FOR 2023-24 SEASON AT 295.10 LAKH BALES

Cotton Association of India (CAI) has released its first estimate of the cotton pressing numbers for 2023-24 season, which began on 1st October 2023 at 295.10 lakh bales of 170 kgs. each (equivalent to 309.67 lakh running bales of 162 kgs. each). **This estimate has been released on 29th October 2023 at COTTON INDIA 2023-24 Conference held in Hyderabad, Telangana.**

As per the report submitted at this Conference, cotton acreage during the ongoing 2023-24 season is estimated at 123.87 lakh hectare which is less by 6.74 lakh hectare compared to the last year's cotton acreage of 130.61 lakh hectare. Taking into consideration the above acreage and pressing estimates, yield per hectare in India for 2023-24 season works out to 405 kgs. per hectare (which is around 2.38 bales per hectare). The state-wise break-up of cotton pressing numbers and balance sheet for the season released at this Conference with the corresponding data of the previous season are enclosed.

The total cotton supply till end of the cotton season 2023-24 (i.e. upto 30th September 2024) is estimated at 346 lakh bales of 170 kgs. each (equivalent to 363.09 lakh running bales of 162 kgs. each) as against the last year's total cotton supply of 355.40 lakh bales of 170 kgs. each (equivalent to 372.95 lakh running bales of 162 kgs. each). The estimated cotton supply consists of the opening stock of 28.90 lakh bales (equivalent to 30.33 lakh running bales of 162 kgs. each) at the beginning of 2023-24 season on 1st October 2023, cotton pressing numbers estimated for the season at 295.10 lakh bales of 170 kgs. each (equivalent to 309.67 lakh running bales of 162 kgs. each) and imports for the season estimated at 22 lakh bales of 170 kgs. each (equivalent to 23.09 lakh running bales of 162 kgs. each). The cotton imports estimated by the CAI for the season are higher by 9.50 lakh bales of 170 kgs. each compared to last year. The domestic consumption estimated by the CAI is the same as last year i.e. 311 lakh bales of 170 kgs. each (equivalent to 326.35 lakh running bales of 162 kgs. each). The exports for the season 2023-24 are estimated by the CAI at 14 lakh bales of 170 kgs. each (equivalent to 14.69 lakh running bales of 162 kgs. each) as against 15.50 lakh bales of 170 kgs. each (equivalent to 16.27 lakh running bales of 162 kgs. each) estimated for 2022-23 season. The CAI estimates exports to be lower by 1.50 lakh bales of 170 kgs. each in the ongoing 2023-24 season compared to last year.

SALIENT FEATURES OF THE CAI CROP COMMITTEE MEETING HELD ON 25TH OCTOBER 2023

The CAI Crop Committee, which met on 25th October 2023, was attended by 28 members across all 10 cotton growing states. Based on the input given by the representatives of each state association, the CAI Crop Committee has estimated total cotton pressing numbers for 2023-24 season and has also drawn cotton balance sheet for 2023-24 season.

The following are the salient features of the CAI crop report:-

1. CONSUMPTION

Since the CAI does not have accurate consumption data, it has maintained cotton consumption for 2023-24 season at 311 lakh bales of 170 kgs. each (equivalent to 326.36 lakh running bales of 162 kgs. each) i.e. same as estimated by the COCPC in last year.

The Indian mills are reported to be running at an average 80-85% capacity. However, if the Indian mills run with their optimum capacity, Indian cotton consumption may go upto 380 lakh bales of 170 kgs. each (equivalent to 398.77 lakh running bales of 162 kgs. each).

2. COTTON PRESSING

As per the crop report submitted by upcountry associations and trade sources at the meeting of the CAI Crop Committee, there is severe pink bollworm infestation in North Zone comprising the states of Punjab, Haryana and Rajasthan. The acreage in North Zone is also estimated to be slightly lower at 16.26 lakh hectare as against 16.39 lakh hectare in last year. The pressing numbers for North Zone are estimated at 43 lakh bales of 170 kgs. each (equivalent to 45.12 lakh running bales of 162 kgs. each) i.e. same as last year.

The Central Zone acreage is estimated to be slightly higher at 75.66 lakh hectare as against 73.78 lakh hectare in last year. As per the reports from Gujarat, the plant growth is reported to have been adversely impacted due to dry spell of about 45 days from 1st August 2023 to 15th September 2023. Also, heavy rains received in the last week of September 2023 are reported to have caused damage to the standing crop. The reports presented by the state associations from Maharashtra suggest a crop loss of about 20% in Marathwada and 10-15% in Khandesh due to adverse climatic conditions. The overall loss in Maharashtra is estimated to be about 10-12%. In Madhya Pradesh also, heavy rains in September 2023 are reported to have caused some damage to the standing cotton crop. The total pressing numbers estimated for the entire Central Zone in 2023-24 season are 179.60 lakh bales of 170 kgs. each (equivalent to 188.47 lakh running bales of 162 kgs. each) as against 194.62 lakh bales of 170 kgs. each (equivalent to 204.23 lakh running bales of 162 kgs. each) in last year. The pressing numbers for Central Zone for 2023-24 crop year are estimated to be lower by about 8.36% compared to last year.

In Southern Zone comprising the states of Telangana, Andhra Pradesh, Karnataka and Tamil Nadu, total acreage under cotton during 2023-24 season is 29.43 lakh hectare as against 38.09 lakh hectare in 2022-23 – a reduction of 8.66 lakh hectare. The reports received from Telangana indicate sowing to be less by 10% in the current cotton season and also an yield loss of 10% is estimated by the state associations. In Andhra Pradesh also, about 35% less sowing is reported and in Adoni area, some damage is reported to the crop. In Karnataka, 17% less sowing is reported and due to drought-like situation in the State, crop is likely to reduce. The total pressing numbers estimated for the Southern Zone in 2023-24 season are 67.50 lakh bales of 170 kgs. each (equivalent to 70.83 lakh running bales of 162 kgs. each) as against 74.85 lakh bales of 170 kgs. each (equivalent to 78.55 lakh running bales of 162 kgs. each) in last year. In Orissa, the acreage is reported to be 2.35 lakh hectare during 2023-24 crop year as against 2.16 lakh hectare in 2022-23 season.

However, the crop is reported to be same as in last year i.e. 3 lakh bales of 170 kgs. each (equivalent to 3.15 lakh running bales of 162 kgs. each). In other states, the pressing numbers in 2023-24 season are estimated to be 2 lakh bales of 170 kgs. each. (equivalent to 2.09 lakh running bales of 162 kgs. each) as against 3 lakh bales of 170 kgs. each (equivalent to 3.15 lakh running bales of 162 kgs. each) in 2022-23 season. **Overall, CAI estimates a reduction of 23.80 lakh bales of 170 kgs. each in the pressing numbers in the ongoing season – 295.10 lakh bales of 170 kgs. each (equivalent to 309.67 lakh running bales of 162 kgs. each) as against 318.90 lakh bales of 170 kgs. each (equivalent to 334.65 lakh running bales of 162 kgs. each) in last year.**

The state-wise decrease/increase in the pressing numbers during 2023-24 season compared to last year is given below:-

States	Decrease (-) / Increase (+) in pressing numbers during 2023-24 season compared to last year
Punjab	1.75
Haryana	5.00
Rajasthan	(-) 6.75
Gujarat	(-) 9.41
Maharashtra	(-) 4.11
Madhya Pradesh	(-) 1.50
Telangana	(-) 0.50
Andhra Pradesh	(-) 3.90
Karnataka	(-) 4.00
Tamil Nadu	1.05
Orissa	(-) 0.43
Others	(-) 1.00

(The figures in bracket represent decrease)

3. IMPORTS

The cotton imports into India during 2023-24 season are estimated at 22 lakh bales of 170 kgs. each (equivalent to 23.09 lakh running bales of 162 kgs. each) as against 12.50 lakh bales of 170 kgs. each (equivalent to 13.12 lakh running bales of 162 kgs. each) estimated for last season. The cotton imports estimated for the ongoing crop year 2023-24 are higher by 9.5 lakh bales of 170 kgs. each compared to last year.

4. EXPORTS

The cotton exports for 2023-24 crop year are estimated to be lower at 14 lakh bales of 170 kgs. each (equivalent to 14.69 lakh running bales of 162 kgs. each) as against 15.50 lakh bales of 170 kgs. each (equivalent to 16.27 lakh running bales of 162 kgs. each) estimated for the last season.

5. CLOSING STOCK AS AT 30TH SEPTEMBER 2024

The closing stock as on 30th September 2024 is estimated at 21 lakh bales of 170 kgs. each (equivalent to 22.03 lakh running bales of 162 kgs. each) as against 28.90 lakh bales of 170 kgs. each (equivalent to 30.33 lakh running bales of 162 kgs. each) in last year.

Mumbai

Atul S. Ganatra

Date: 31st October 2023

President



Estimate of Cotton Sowing Area

S. No.	State	2022-23	2023-24	Change in area		Change over last year	
		COCPC	Agri Dep	Area	Percentage (%)	Yield	Crop
		Area	Area				
1	Punjab	2.49	1.7	-0.79	-31.73%	50%	2
2	Haryana	5.75	6.65	0.9	15.65%	20%	6
3	Rajasthan	8.15	7.91	-0.24	-2.94%	-40%	-7
	North Total	16.39	16.26	-0.13	-0.79%		
4	Gujarat	25.54	26.82	1.28	5.01%	-10%	-10
5	Maharashtra	42.29	42.34	0.05	0.12%	-10%	-8
6	Madhya Pradesh	5.95	6.5	0.55	9.24%	-10%	-2
	Central Total	73.78	75.66	1.88	2.55%		
7	Telangana	20.25	18.22	-2.03	-10.02%	5%	0
8	Andhra Pradesh	6.99	3.98	-3.01	-43.06%	0%	-5
9	Karnataka	9.23	6.92	-2.31	-25.03%	-15%	-5
10	Tamil Nadu	1.62	0.31	-1.31	-80.86%	0%	0
	South Total	38.09	29.43	-8.66	-22.74%		
11	Orissa	2.16	2.35	0.19	8.80%	-15%	-0.5
12	Others	0.19	0.17	-0.02	-10.53%		0
	All India	130.61	123.87	-6.74	-5.16%		-29.5



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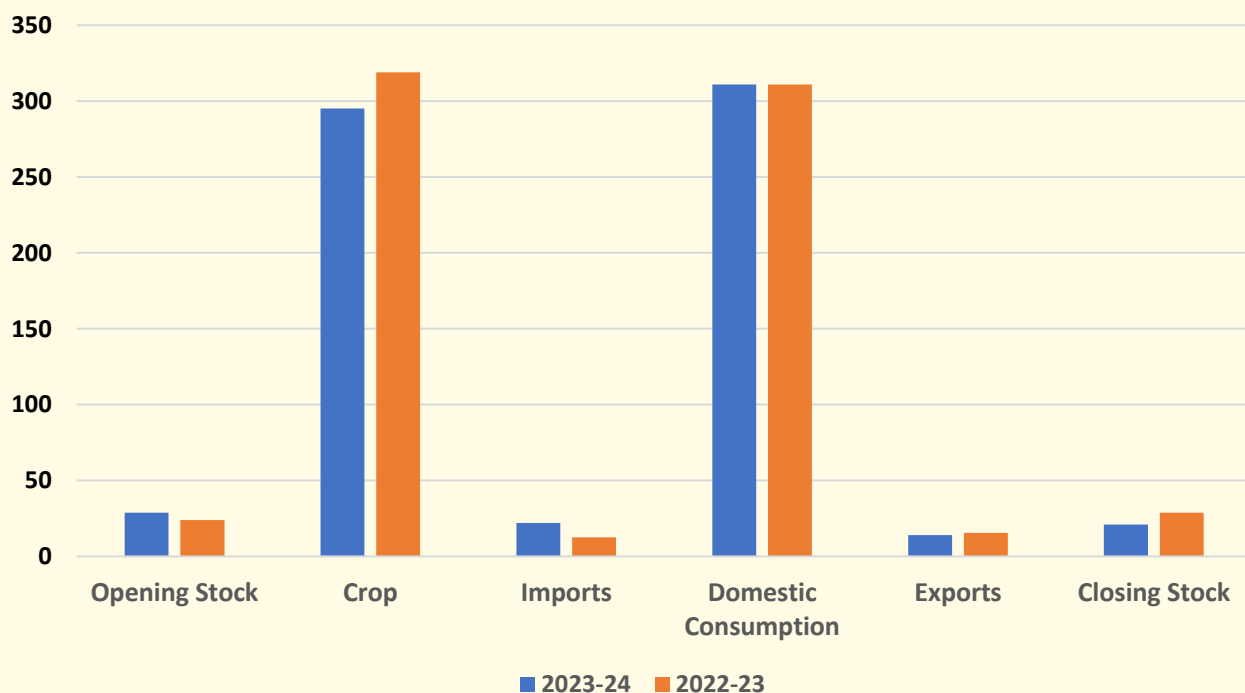
INDIAN COTTON BALANCE SHEET FOR THE SEASON 2022-23 AND 2023-24

Released as on 29th October 2023

All Figures in Lakh Bales of 170 Kg

Season	2023-24	2022-23	Change	
Details	Oct-23		Monthly	Yearly
Supply				
Opening Stock	28.90	24.00	28.90	4.90
Crop	295.10	318.90	295.10	-23.80
Imports	22.00	12.50	22.00	9.50
Total Supply	346.00	355.40	346.00	-9.40
Demand				
Mill Consumption	280.00	280.00	280.00	
Consumption by SSI Units	15.00	15.00	15.00	
Non-Mill Consumption	16.00	16.00	16.00	
Total Domestic Demand	311.00	311.00	311.00	
Available Surplus	35.00	44.40	35.00	-9.40
Exports	14.00	15.50	14.00	-1.50
Closing Stock	21.00	28.90	21.00	-7.90

Indian Cotton Comparative Balancesheet





COTTON ASSOCIATION OF INDIA

INDIAN COTTON CROP ESTIMATE FOR THE SEASON 2022-23 AND 2023-24

Released on 29th October 2023

State	2023-24			2022-23 Final	
	Pressed Bales	Loose	Total Bales	Total Bales	Yearly Change in Bales
	All figures in Lakh Bales of 170 Kg				
North Zone					
Punjab	4.30	0.20	4.50	2.75	1.75
Haryana	15.52	0.48	16.00	11.00	5.00
Upper Rajasthan	10.67	0.33	11.00	18.00	-7.00
Lower Rajasthan	11.17	0.33	11.50	11.25	0.25
Total	41.66	1.34	43.00	43.00	0.00
Central Zone					
Gujarat	83.01	1.99	85.00	94.41	-9.41
Maharashtra	75.14	1.46	76.60	80.71	-4.11
Madhya Pradesh	17.50	0.50	18.00	19.50	-1.50
Total	175.65	3.95	179.60	194.62	-15.02
South Zone					
Telangana	29.09	0.91	30.00	30.50	-0.50
Andhra Pradesh	12.20	0.30	12.50	16.40	-3.90
Karnataka	17.95	0.55	18.50	22.50	-4.00
Tamil Nadu	6.36	0.14	6.50	5.45	1.05
Total	65.60	1.90	67.50	74.85	-7.35
Orissa	2.92	0.08	3.00	3.43	-0.43
Others	2.00	0.00	2.00	3.00	-1.00
Grand Total	287.83	7.27	295.10	318.90	-23.80

* Loose cotton production figures are as per the survey report of Sardar Vallabhbhai Patel International School of Textiles and Management for a non-covid year.



COTTON ASSOCIATION OF INDIA

ALL INDIA COTTON CONSUMPTION

Released on 29th October 2023

All figures in Lakh Bales of 170 Kg

North Zone

Punjab

Haryana

Upper Rajasthan

Lower Rajasthan

Total

98.50

Central Zone

Gujarat

80.00

Maharashtra

34.00

Madhya Pradesh

34.00

Total

148.00

South Zone

Telangana

8.00

Andhra Pradesh

35.00

Karnataka

3.50

Tamil Nadu

108.00

Kerala

3.00

Total

157.50

Orissa

0.00

Others

10.00

Grand Total

414.00

CAI Services



**Cotton Testing
Laboratories**



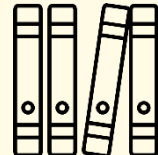
**Maintain Indian
Cotton Grade
Standard**



**Indian Cotton
Spot Rate**



**Arbitration and
Conciliation
Mechanism**



**Cotton Research
and
Development**

**Issue Certificate
of Origin**

**Indian Cotton
Statistics**

Publications