COTTON ASSOCIATION OF INDIA

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COTTON ASSOCIATION OF INDIA

MONTHLY REPORT

FEBRUARY 2026

ALL INDIA ARRIVALS

STATEWISE CROP ESTIMATES

INDIAN COTTON BALANCE SHEET

COTTON ASSOCIATION OF INDIA

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PRESS RELEASE

CAI INCREASES INDIA'S COTTON PRESSING ESTIMATE FOR THE 2025-26 SEASON TO 320.50 LAKH BALES +/-3%

Cotton Association of India (CAI) has released its latest estimate of India's total cotton pressing numbers for 2025-26 season, which began on 1st October, 2025. The CAI Crop Committee met on Thursday, the 12th March 2026 virtually which was attended by 21 members representing various cotton growing regions of the country. Based on the input received from the members of eleven cotton growing state associations and other trade sources, the CAI Crop Committee has estimated cotton pressing of each state for 2025-26 season and also drawn cotton balance sheets till the end of February 2026 and also till end of ongoing crop year 2025-26 on 30th September 2026. The state-wise break-up of cotton pressing numbers as well as balance sheets drawn by the CAI Crop Committee at the above meeting are enclosed.

The following are the salient features of the CAI Crop Report: -

1. COTTON PRESSING

As per the latest report submitted by upcountry associations and trade sources at the above CAI Crop Committee meeting, CAI's total cotton pressing estimate of the country for 2025-26 season has been increased by 3.50 lakh bales to

320.50 lakh bales of 170 kgs. each (equivalent to 336.33 lakh running bales of 162 kgs. each) +/- 3% from 317.00 lakh bales of 170 kgs. each (equivalent to 332.65 lakh running bales of 162 kgs. each) estimated earlier.

The changes made in the state-wise cotton pressing numbers compared to those estimated previously are given below: -

(In lakh bales of 170 kgs. each)

States	**Increase (+) / Decrease (-)**
Punjab	-0.50
Upper Rajasthan	-0.50
Lower Rajasthan	-0.50
Maharashtra	+4.00
Andhra Pradesh	+1.00
TOTAL	**+3.50**

The Committee members will have a close watch on the cotton pressing numbers in the subsequent months and if any addition or reduction is required to be made in the pressing estimates, the same will be made in the CAI reports of the subsequent months.

2. CONSUMPTION

CAI has increased India's total cotton consumption during 2025-26 i.e. upto 30th September 2026 by 10.00 lakh bales to 315.00 lakh bales of 170 kgs. each (equivalent to 330.56 lakh running bales of 162 kgs. each) from 305.00 lakh bales of 170 kgs. each (equivalent to 320.06 lakh running bales of 162 kgs. each) estimated earlier. Total cotton consumption estimated by the CAI during the ongoing crop year 2025-26 is higher by 1 lakh bales than 314.00 lakh bales of 170 kgs. each (equivalent to 329.51 lakh running bales of 162 kgs. each) estimated during last year.

Upto 28th February 2026, cotton consumption is estimated at 131.25 lakh bales of 170 kgs. each (equivalent to 137.73 lakh running bales of 162 kgs. each).

3. IMPORTS

The CAI has reduced its estimate of cotton imports into India during 2025-26 season by 3.00 lakh bales to 47.00 lakh bales of 170 kgs. each (equivalent to 49.32 lakh running bales of 162 kgs. each) from 50.00 lakh bales of 170 kgs. each (equivalent to 52.47 lakh running bales of 162 kgs. each) estimated earlier.

The cotton imports estimated by the CAI for the ongoing 2025-26 season are higher by 6.00 lakh bales of 170 kgs. each than 41.00 lakh bales of 170 kgs. each estimated for the last year.

Upto 28th February 2026, about 36.00 lakh bales of 170 kgs. each (equivalent to 37.78 lakh running bales of 162 kgs. each) are estimated to have arrived the Indian ports.

4. EXPORTS

The CAI has maintained its cotton exports estimate for the 2025-26 season at 15.00 lakh bales of 170 kgs. each (equivalent to 15.74 lakh running bales of 162 kgs. each), against 18.00 lakh bales of 170 kgs. each (equivalent to 18.89 lakh running bales of 162 kgs. each) estimated for 2024-25 season.

Upto 28th February 2026, about 7.00 lakh bales of 170 kgs. each (equivalent to 7.35 lakh running bales of 162 kgs. each) are estimated to have been shipped by the country.

5. TOTAL COTTON SUPPLY

Total cotton supply till end of the 2025-26 season i.e. upto 30th September 2026 is estimated at 428.09 lakh bales of 170 kgs. each (equivalent to 449.23 lakh running bales of 162 kgs. each) as against the last year's total supply of 392.59 lakh bales of 170 kgs. each (equivalent to 411.98 lakh running bales of 162 kgs. each). The total cotton supply estimated for the ongoing 2025-26 crop year consists of the opening stock of 60.59 lakh bales of 170 kgs. each (equivalent to 63.58 lakh running bales of 162 kgs. each) at the beginning of the season on 1st October 2025, cotton pressing numbers for the season estimated at 320.50 lakh bales of 170 kgs. each and imports for the season estimated at 47.00 lakh bales of 170 kgs. each.

Total cotton availability till end February 2026 is estimated at 357.55 lakh bales of 170 kgs. each (equivalent to 375.21 lakh running bales of 162 kgs. each) and the same consists of the opening stock of 60.59 lakh bales at the beginning of the season on 1st October 2025, cotton pressing estimated at 260.96 lakh bales of 170 kgs. each upto 28th February 2026 and imports of 36.00 lakh bales estimated till end February 2026.

6. AVAILABLE SURPLUS

Total available surplus (i.e. total supply of 428.09 lakh bales less total domestic demand estimated at 315.00 lakh bales of 170 kgs. each) works out to 113.09 lakh bales of 170 kgs. each (equivalent to 118.67 lakh running bales of 162 kgs. each) at the end of 2025-26 season i.e. upto 30th September 2026 as against the last year's available surplus of 78.59 lakh bales of 170 kgs. each (equivalent to 82.47 lakh running bales of 162 kgs. each).

7. CLOSING STOCK AS AT 30TH SEPTEMBER 2026

The closing stock at the end of 2025-26 season on 30th September 2026 is reduced by 9.50 lakh bales to 98.09 lakh bales of 170 kgs. each (equivalent to 102.93 lakh running bales of 162 kgs. each) from 107.59 lakh bales of 170 kgs. each (equivalent to 112.90 lakh running bales of 162 kgs. each) estimated earlier. It is higher by 37.50 lakh bales of 170 kgs. each from the closing stock of 60.59 lakh bales of 170 kgs. each (equivalent to 63.58 lakh running bales of 162 kgs. each) for the previous year on 30th September 2025.

The closing stock as on 28th February 2026 is estimated at 219.30 lakh bales of 170 kgs. each (equivalent to 230.13 lakh running bales of 162 kgs. each), which consists of 75.00 lakh bales of 170 kgs. each (equivalent to 78.70 lakh running bales of 162 kgs. each) with textile mills and 144.30 lakh bales of 170 kgs. each (equivalent to 151.43 lakh running bales of 162 kgs. each) with CCI, Maharashtra Federation, MNCs, Ginners, Traders, etc. including cotton sold but not delivered.

Vinay N. Kotak
President

Atul S. Ganatra
Chairman, CAI Crop Committee

Mumbai

Date: 13th March 2026

COTTON ASSOCIATION OF INDIA

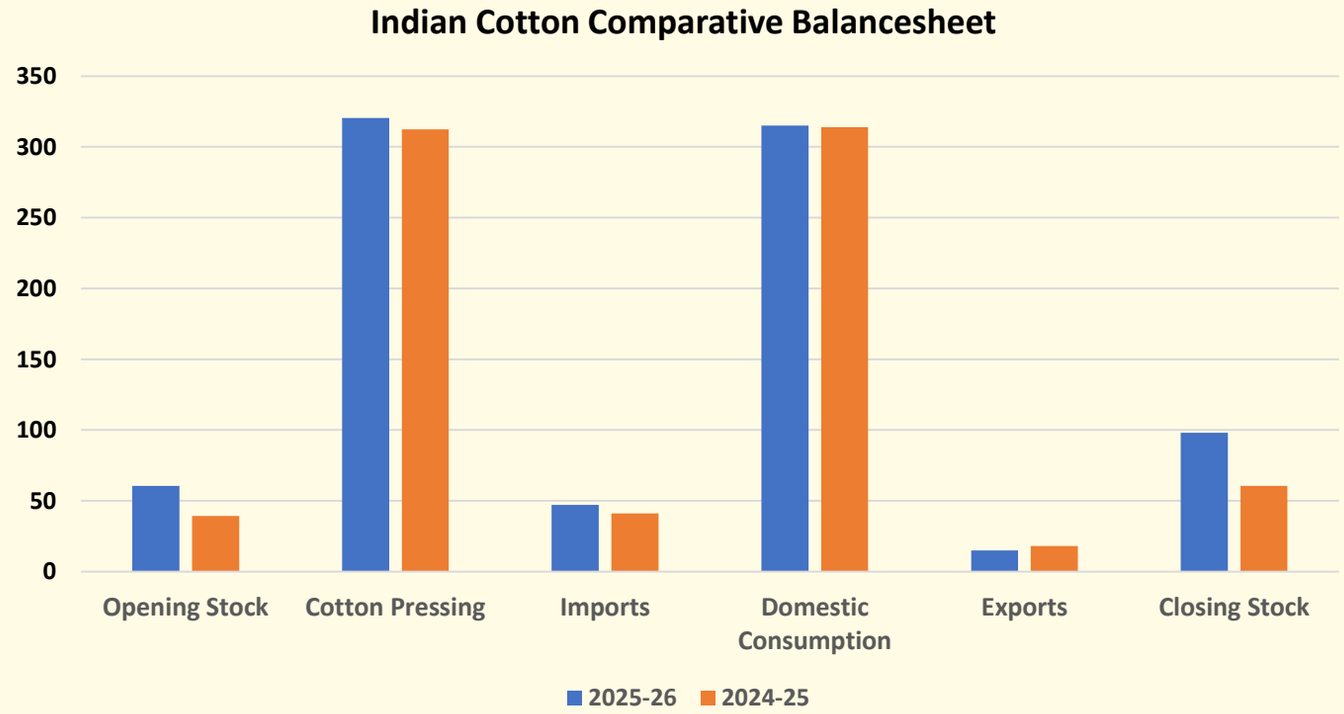
INDIAN COTTON BALANCE SHEET FOR THE SEASON 2024-25 AND 2025-26

Estimated as on 28th February 2026

All Figures in Lakh Bales of 170 Kg

Season	2025-26		2024-25	Change	
Details	**Jan-26**	**Feb-26**		**Monthly**	**Yearly**
Supply					
Opening Stock	60.59	60.59	39.19		21.40
Cotton Pressing	317.00	320.50	312.40	3.50	8.10
Imports	50.00	47.00	41.00	-3.00	6.00
Total Supply	**427.59**	**428.09**	**392.59**	**0.50**	**35.50**
Demand					
Non-MSME Consumption	216.00	226.00	210.00	10.00	16.00
MSME Consumption	73.00	73.00	89.00		-16.00
Non-Textile Consumption	16.00	16.00	15.00		1.00
Total Domestic Demand	**305.00**	**315.00**	**314.00**	**10.00**	**1.00**
Available Surplus	**122.59**	**113.09**	**78.59**	**-9.50**	**34.50**
Exports	15.00	15.00	18.00		-3.00
Closing Stock	**107.59**	**98.09**	**60.59**	**-9.50**	**37.50**

Note-The CAI's above estimates are +/- 3%



COTTON ASSOCIATION OF INDIA

INDIAN COTTON PRESSING ESTIMATE FOR THE SEASON 2024-25 AND 2025-26

Estimated as on 28th February 2026

State	As on 28th Feb 2026			As on 31st Jan 2026		2024-25	
	Pressed Bales	Loose	Total Bales	Total Bales	Monthly Change in Bales	Total Bales	Yearly Change in Bales
	All figures in Lakh Bales of 170 Kg						
North Zone							
Punjab	1.30	0.20	1.50	2.00	-0.50	1.50	
Haryana	6.52	0.48	7.00	7.00		8.05	-1.05
Upper Rajasthan	11.67	0.33	12.00	12.50	-0.50	10.35	1.65
Lower Rajasthan	8.17	0.33	8.50	9.00	-0.50	9.65	-1.15
Total	**27.66**	**1.34**	**29.00**	**30.50**	**-1.50**	**29.55**	**-0.55**
Central Zone							
Gujarat	73.01	1.99	75.00	75.00		77.00	-2.00
Maharashtra	96.54	1.46	98.00	94.00	4.00	91.00	7.00
Madhya Pradesh	17.50	0.50	18.00	18.00		19.00	-1.00
Total	**187.05**	**3.95**	**191.00**	**187.00**	**4.00**	**187.00**	**4.00**
South Zone							
Telangana	44.09	0.91	45.00	45.00		48.75	-3.75
Andhra Pradesh	17.70	0.30	18.00	17.00	1.00	13.25	4.75
Karnataka	26.45	0.55	27.00	27.00		24.00	3.00
Tamil Nadu	4.86	0.14	5.00	5.00		4.00	1.00
Total	**93.10**	**1.90**	**95.00**	**94.00**	**1.00**	**90.00**	**5.00**
Orissa	3.42	0.08	3.50	3.50		3.85	-0.35
Others	2.00		2.00	2.00		2.00	
Grand Total	**313.23**	**7.27**	**320.50**	**317.00**	**3.50**	**312.40**	**8.10**

* 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.

Note-The CAI's above estimates are +/- 3%

COTTON ASSOCIATION OF INDIA

ALL INDIA COTTON PRESSINGS

As on 28th February 2026

	Cumulative Pressings		Monthly Change	Daily Average Pressing		Cumulative Pressings	Yearly Change
	28-02-26	31-01-26		Monthly	Cumulative	28-02-25	
	Lakh Bales of 170 Kg			170 Kg Bales		Lakh Bales of 170 Kg	
North Zone							
Punjab	1.50	1.30	0.20	714	993	1.29	0.21
Haryana	6.30	5.80	0.50	1,786	4,172	5.76	0.54
Upper Rajasthan	10.50	9.70	0.80	2,857	6,954	8.07	2.43
Lower Rajasthan	8.00	7.55	0.45	1,607	5,298	7.89	0.11
Total	**26.30**	**24.35**	**1.95**	**6,964**	**17,417**	**23.01**	**3.29**
Central Zone							
Gujarat	50.89	41.89	9.00	32,143	33,702	47.66	3.23
Maharashtra	77.36	59.85	17.51	62,536	51,232	56.99	20.37
Madhya Pradesh	15.65	13.15	2.50	8,929	10,364	16.12	-0.47
Total	**143.90**	**114.89**	**29.01**	**1,03,607**	**95,298**	**120.77**	**23.13**
South Zone							
Telangana	44.75	41.03	3.72	13,286	29,636	46.20	-1.45
Andhra Pradesh	16.16	14.66	1.50	5,357	10,702	8.80	7.36
Karnataka	23.00	20.50	2.50	8,929	15,232	19.10	3.90
Tamil Nadu	1.70	1.05	0.65	2,321	1,126	1.20	0.50
Total	**85.61**	**77.24**	**8.37**	**29,893**	**56,695**	**75.30**	**10.31**
Orissa	3.25	2.50	0.75	2,679	2,152	3.19	0.06
Others	1.90	1.60	0.30	1,071	1,258	1.30	0.60
Grand Total	**260.96**	**220.58**	**40.38**	**1,44,214**	**1,72,821**	**223.57**	**37.39**

Note-The CAI's above estimates are +/- 3%

COTTON ASSOCIATION OF INDIA

Balance Sheet of 05 months

From 01-Oct-2025 to 28-Feb-2026

Details	In Lakh Bales of 170 kg	in '000 Tons
Opening Stock as on 01-Oct-2025	60.59	1,030.03
Pressings upto 28-February-2026	260.96	4,436.32
Imports upto 28-February-2026	36.00	612.00
Total Available	**357.55**	**6,078.35**
Consumption	131.25	2,231.25
Export Shipments upto 28-February-2026	7.00	119.00
Stock with Mills	75.00	1,275.00
Stock with CCI, Maha. Fedn., MNCs, Ginners, Traders & Exporters	144.30	2,453.10
Total	**357.55**	**6,078.35**

Note-The CAI's above estimates are +/- 3%

CAI **Services**

Cotton Testing Laboratories

Maintain Indian Cotton Grade Stadard

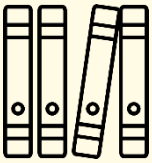
Indian Cotton Spot Rate

Arbitration and Conciliation Mechanism

Cotton Research and Development

Issue Certificate of Origin

Indian Cotton Statistics



Publications