



**COTTON
ASSOCIATION
OF INDIA**

Established 1921

ISO 9001:2015

COTTON ASSOCIATION OF INDIA

MONTHLY REPORT JULY 2025

ALL INDIA ARRIVALS

STATEWISE CROP ESTIMATES

INDIAN COTTON BALANCE SHEET



COTTON ASSOCIATION OF INDIA

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PRESS RELEASE

CAI MAINTAINS ITS LATEST COTTON PRESSING ESTIMATE FOR 2024-25 SEASON AT 311.40 LAKH BALES

Cotton Association of India (CAI) has released its latest estimate of the cotton pressing numbers for 2024-25 season, which began on 1st October 2024. Based on input received from the members of 11 cotton growing state associations and other trade sources, the Association has maintained its cotton pressing estimate for 2024-25 season at 311.40 lakh bales of 170 kgs. each (equivalent to 326.78 lakh running bales of 162 kgs. each) i.e. at the same level as made previously. The State-wise break-up of the Cotton pressing numbers as well as Balance Sheet for the season with the corresponding data for the previous crop year are enclosed.

The total cotton supply till end of July 2025 is estimated at 374.43 lakh bales of 170 kgs. each (equivalent to 392.92 lakh running bales of 162 kgs. each) which consists of the pressings of 302.24 lakh bales of 170 kgs. each (equivalent to 317.17 lakh running bales of 162 kgs. each), imports of 33.00 lakh bales of 170 kgs. each (equivalent to 34.63 lakh running bales of 162 kgs. each) and the opening stock, which has been increased by the CAI by 9.00 lakh bales to 39.19 lakh bales of 170 kgs. each (equivalent to 41.13 lakh running bales of 162 kgs. each) based on the survey conducted by CAI.

Further, the CAI has estimated cotton consumption upto the end of July 2025 at 261.66 lakh bales of 170 kgs. each (equivalent to 274.58 lakh running bales of 162 kgs. each) while the export shipments upto 31st July 2025 are estimated by the CAI at 16.00 lakh bales of 170 kgs. each (equivalent to 16.79 lakh running bales of 162 kgs. each). Stock at the end of July 2025 is estimated at 96.77 lakh bales of 170 kgs. each (equivalent to 101.55 lakh running bales of 162 kgs. each) including 32.50 lakh bales of 170 kgs. each (equivalent to 34.10 lakh running bales of 162 kgs. each) with textile mills and the remaining 64.27 lakh bales of 170 kgs. each (equivalent to 67.44 lakh running bales of 162 kgs. each) with CCI, Maharashtra

Federation and others (MNCs, traders, ginners, exporters, etc.) including cotton sold but not delivered.

The CAI has estimated its total cotton supply till end of the cotton season 2024-25 (i.e. upto 30th September 2025) at 389.59 lakh bales of 170 kgs. each (equivalent to 408.83 lakh running bales of 162 kgs. each) as against 380.59 lakh bales of 170 kgs. each (equivalent to 399.38 lakh running bales of 162 kgs. each) estimated previously. The total cotton supply consists of the opening stock of 39.19 lakh bales at the beginning of 2024-25 season on 1st October 2024, cotton pressing numbers estimated for the season at 311.40 lakh bales of 170 kgs. each and imports for the season estimated at 39.00 lakh bales of 170 kgs. each (equivalent to 40.93 lakh running bales of 162 kgs. each) as against 15.20 lakh bales of 170 kgs. each (equivalent to 15.95 lakh running bales of 162 kgs. each) estimated for 2023-24 season.

The CAI has however increased its domestic consumption estimate to 314.00 lakh bales of 170 kgs. each (equivalent to 329.51 lakh running bales of 162 kgs. each) as against 308.00 lakh bales of 170 kgs. each (equivalent to 323.21 lakh running bales of 162 kgs. each) estimated previously. The exports for the season 2024-25 are estimated at 18.00 lakh bales of 170 kgs. each (equivalent to 18.89 lakh running bales of 162 kgs. each) as against 28.36 lakh bales of 170 kgs. each (equivalent to 29.76 lakh running bales of 162 kgs. each) estimated for 2023-24 season.

SALIENT FEATURES OF THE CAI CROP COMMITTEE MEETING HELD ON 13TH AUGUST 2025

The Crop Committee of the Cotton Association of India (CAI) held its meeting on Wednesday, the 13th August 2025 virtually, which was attended by 14 members representing various cotton growing regions of the country. Based on the input given by the representatives of each state association, the CAI Crop Committee has estimated total cotton pressing numbers for 2024-25 season and has also drawn cotton balance sheet for 2024-25 season.

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

1. CONSUMPTION

The CAI has increased its cotton consumption estimate for 2024-25 season by 6.00 lakh bales to 314.00 lakh bales of 170 kgs. each (equivalent to 329.51 lakh running bales of 162 kgs. each) from 308.00 lakh bales of 170 kgs. each estimated previously.

Upto 31st July 2025, the consumption is estimated at 261.66 lakh bales of 170 kgs. each (equivalent to 274.58 lakh running bales of 162 kgs. each).

2. COTTON PRESSING

As per the latest report submitted by upcountry associations and trade sources at the meeting of the CAI Crop Committee, total cotton pressing numbers for 2024-25 season are

maintained at 311.40 lakh bales of 170 kgs. each (equivalent to 326.78 lakh running bales of 162 kgs. each) i.e. at the same level as estimated previously.

The Committee members will review the cotton pressing numbers in the subsequent months and if any addition or reduction is required to be made in the pressing numbers, the same will be made in the CAI report.

3. IMPORTS

The cotton imports for the 2024-25 season are maintained at 39.00 lakh bales of 170 kgs. each (equivalent to 40.93 lakh running bales of 162 kgs. each) i.e. at the same level as estimated previously. The cotton imports estimated by the CAI for the season are higher by 23.80 lakh bales of 170 kgs. each than 15.20 lakh bales of 170 kgs. each estimated for the last year.

Upto 31st July 2025, about 33.00 lakh bales of 170 kgs. each (equivalent to 34.63 lakh running bales of 162 kgs. each) are estimated to have arrived the Indian Ports.

4. EXPORTS

The CAI has increased its cotton exports for the 2024-25 season to 18.00 lakh bales of 170 kgs. each (equivalent to 18.89 lakh running bales of 162 kgs. each) from 17.00 lakh bales of 170 kgs. each (equivalent to 17.84 lakh running bales of 162 kgs. each) estimated previously. The cotton exports for 2024-25 crop year are estimated to be lower by 10.36 lakh bales of 170 kgs. each than 28.36 lakh bales of 170 kgs. each (equivalent to 29.76 lakh running bales of 162 kgs. each) estimated for the last season.

5. CLOSING STOCK AS AT 30TH SEPTEMBER 2025

The closing stock at the end of 2024-25 season on 30th September 2025 is estimated at 57.59 lakh bales of 170 kgs. each (equivalent to 60.43 lakh running bales of 162 kgs. each) as against 39.19 lakh bales of 170 kgs. each (equivalent to 41.13 lakh running bales of 162 kgs. each) in last year. As per survey conducted by CAI, stock with mills is estimated at 26.00 lakh bales, which is equivalent about 1 month consumption while with CCI and others stock is estimated to be about 13.00 lakh bales at the close of the 2023-24 season on 30th September 2024.

As on 30th September 2025, closing stock, which is estimated at 57.59 lakh bales, is higher by 18.40 lakh bales as compared to the last year's closing stock of 39.19 lakh bales mainly due to the increase of 23.80 lakh bales in imports during the 2024-25 season which are estimated at 39.00 lakh bales of 170 kgs. each as against 15.20 lakh bales in last year.

Mumbai

Atul S. Ganatra

Date: 14th August 2025

President



COTTON ASSOCIATION OF INDIA

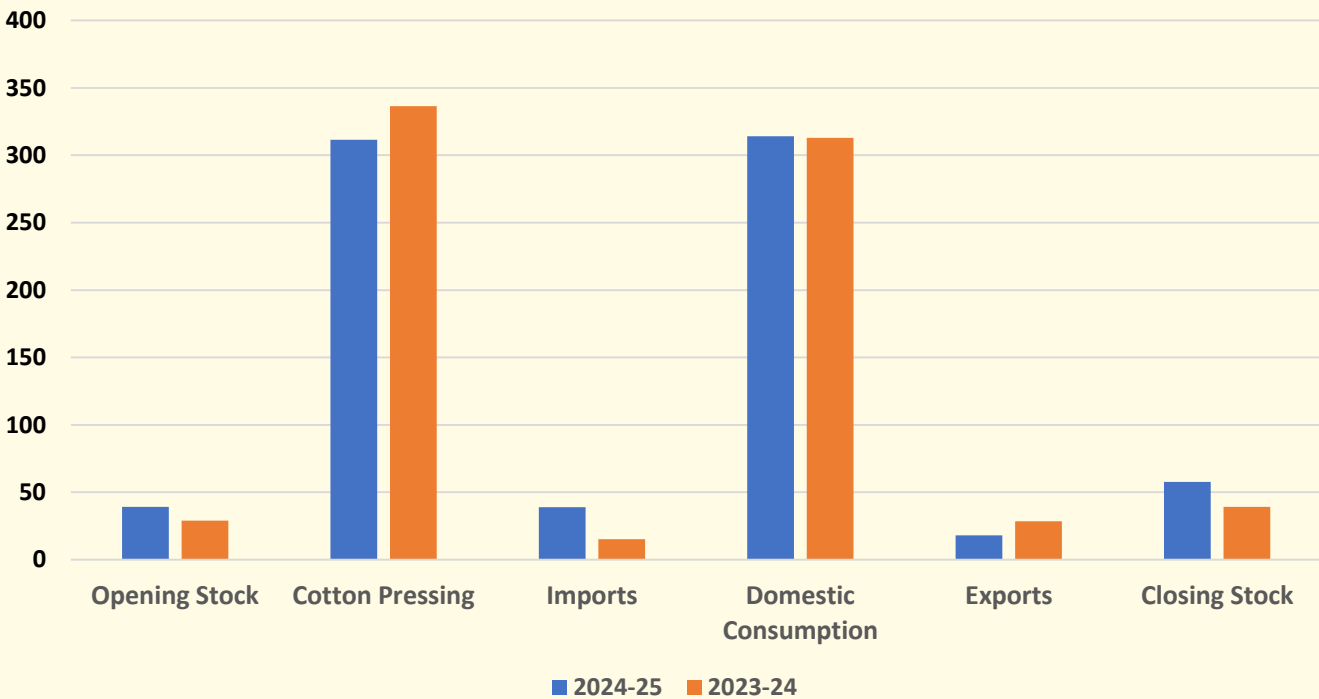
INDIAN COTTON BALANCE SHEET FOR THE SEASON 2023-24 AND 2024-25

Estimated as on 31st July 2025

All Figures in Lakh Bales of 170 Kg

Season	2024-25		2023-24	Change	
Details	Jun-25	Jul-25		Monthly	Yearly
Supply					
Opening Stock	30.19	39.19	28.90	9.00	10.29
Cotton Pressing	311.40	311.40	336.45		-25.05
Imports	39.00	39.00	15.20		23.80
Total Supply	380.59	389.59	380.55	9.00	9.04
Demand					
Non-MSME Consumption	200.00	210.00	201.00	10.00	9.00
MSME Consumption	92.00	89.00	96.00	-3.00	-7.00
Non-Textile Consumption	16.00	15.00	16.00	-1.00	-1.00
Total Domestic Demand	308.00	314.00	313.00	6.00	1.00
Available Surplus	72.59	75.59	67.55	3.00	8.04
Exports	17.00	18.00	28.36	1.00	-10.36
Closing Stock	55.59	57.59	39.19	2.00	18.40
As per survey conducted by CAI, Closing Stock for 2023-24 cotton season increased by 9 lakh bales on 13th August, 2025.					

Indian Cotton Comparative Balancesheet





COTTON ASSOCIATION OF INDIA

INDIAN COTTON PRESSING ESTIMATE FOR THE SEASON 2023-24 AND 2024-25

Estimated as on 31st July 2025

State	As on 31st Jul 2025			As on 30th Jun 2025		2023-24	
				Total Bales	Monthly Change in Bales	Total Bales	Yearly Change in Bales
	Pressed Bales	Loose	Total Bales				
	All figures in Lakh Bales of 170 Kg						
North Zone							
Punjab	1.30	0.20	1.50	1.50		3.65	-2.15
Haryana	7.57	0.48	8.05	8.05		13.30	-5.25
Upper Rajasthan	10.02	0.33	10.35	10.35		15.47	-5.12
Lower Rajasthan	9.32	0.33	9.65	9.65		13.20	-3.55
Total	28.21	1.34	29.55	29.55		45.62	-16.07
Central Zone							
Gujarat	75.51	1.99	77.50	77.50		90.50	-13.00
Maharashtra	88.54	1.46	90.00	90.00		92.71	-2.71
Madhya Pradesh	18.50	0.50	19.00	19.00		19.00	
Total	182.55	3.95	186.50	186.50		202.21	-15.71
South Zone							
Telangana	48.59	0.91	49.50	49.50		44.00	5.50
Andhra Pradesh	11.70	0.30	12.00	12.00		13.00	-1.00
Karnataka	23.45	0.55	24.00	24.00		21.60	2.40
Tamil Nadu	3.86	0.14	4.00	4.00		4.25	-0.25
Total	87.60	1.90	89.50	89.50		82.85	6.65
Orissa	3.77	0.08	3.85	3.85		3.77	0.08
Others	2.00		2.00	2.00		2.00	
Grand Total	304.13	7.27	311.40	311.40		336.45	-25.05

* 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.
Pressing numbers for 2023-24 cotton season increased by 9 lakh bales on 13th August, 2025.



COTTON ASSOCIATION OF INDIA

ALL INDIA COTTON PRESSINGS

As on 31st July 2025

	Cumulative Pressings		Monthly Change	Daily Average Pressing		Cumulative Pressings	Yearly Change
	31-07-25	30-06-25		Monthly	Cumulative	31-07-24	
	Lakh Bales of 170 Kg			170 Kg Bales		Lakh Bales of 170 Kg	
North Zone							
Punjab	1.50	1.50	0.00	0	493	3.65	-2.15
Haryana	7.50	7.39	0.11	355	2,467	13.10	-5.60
Upper Rajasthan	10.10	10.10	0.00	0	3,322	15.47	-5.37
Lower Rajasthan	9.40	9.32	0.08	258	3,092	13.20	-3.80
Total	28.50	28.31	0.19	613	9,375	45.42	-16.92
Central Zone							
Gujarat	76.20	75.58	0.62	2,000	25,066	88.31	-12.11
Maharashtra	89.25	86.46	2.79	9,000	29,359	87.65	1.60
Madhya Pradesh	18.40	18.20	0.20	645	6,053	18.00	0.40
Total	183.85	180.24	3.61	11,645	60,477	193.96	-10.11
South Zone							
Telangana	48.02	47.77	0.25	806	15,796	34.45	13.57
Andhra Pradesh	10.57	10.35	0.22	710	3,477	11.75	-1.18
Karnataka	22.70	22.20	0.50	1,613	7,467	19.85	2.85
Tamil Nadu	2.75	1.85	0.90	2,903	905	2.50	0.25
Total	84.04	82.17	1.87	6,032	27,645	68.55	15.49
Orissa	3.85	3.85	0.00	0	1,266	3.70	0.15
Others	2.00	2.00	0.00	0	658	2.00	0.00
Grand Total	302.24	296.57	5.67	18,290	99,421	313.63	-11.39



COTTON ASSOCIATION OF INDIA

Balance Sheet of 10 months

From 1-Oct-2024 to 31-Jul-2025

Details	In Lakh Bales of 170 kg	in '000 Tons
Opening Stock as on 01-Oct-2024	39.19	666.23
Pressings upto 31-July-2025	302.24	5,138.08
Imports upto 31-July-2025	33.00	561.00
Total Available	374.43	6,365.31
Consumption	261.66	4,448.22
Export Shipments upto 31-July-2025	16.00	272.00
Stock with Mills	32.50	552.50
Stock with CCI, Maha. Fedn., MNCs, Ginners, Traders & Exporters	64.27	1,092.59
Total	374.43	6,365.31

CAI Services



**Cotton Testing
Laboratories**



**Maintain Indian
Cotton Grade
Standard**



**Indian Cotton
Spot Rate**



**Arbitration and
Conciliation
Mechanism**



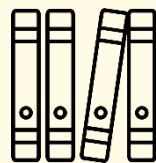
**Cotton Research
and
Development**



**Issue Certificate
of Origin**



**Indian Cotton
Statistics**



Publications