



**COTTON
ASSOCIATION
OF INDIA**

Established 1921

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COTTON ASSOCIATION OF INDIA

MONTHLY REPORT

JULY 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 339.00 LAKH BALES +/-3%

Cotton Association of India (CAI) has released its latest estimate of India's total cotton pressing for the 2025-26 season, which commenced on 1st October 2025. The CAI Crop Committee met on Monday, 10th August 2026, and was attended by 16 members representing various cotton-growing regions of the country.

Based on inputs received from members of eleven cotton-growing state associations and other trade sources, the CAI Crop Committee estimated the state-wise cotton pressing for the 2025-26 season and prepared the cotton balance sheets up to 31st July 2026 and for the entire crop year ending 30th September 2026. The state-wise cotton pressing figures and balance sheets 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 CAI Crop Committee meeting, CAI's total cotton pressing estimate for the country for the 2025-26 season has been increased by 2.00 lakh bales to 339.00 lakh bales of 170 kgs. each (equivalent to 355.74 lakh running bales of 162 kgs.

each) $\pm 3\%$, from 337.00 lakh bales of 170 kgs. each (equivalent to 353.64 lakh running bales of 162 kgs. each) estimated earlier.

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

(In lakh bales of 170 kgs. each)	
States	Increase (+) / Decrease (-)
Upper Rajasthan	-0.25
Lower Rajasthan	+0.25
Maharashtra	+0.50
Madhya Pradesh	+0.50
Karnataka	+0.50
Tamil Nadu	+0.50
TOTAL	+2.00

The Committee members will closely monitor the cotton pressing estimates in the subsequent months. Any addition or reduction required will be reflected in the CAI reports of the subsequent months.

2. CONSUMPTION

CAI has maintained India’s total cotton consumption during the 2025-26 season, i.e. up to 30th September 2026, at 348.00 lakh bales of 170 kgs. each (equivalent to 365.19 lakh running bales of 162 kgs. each), at the same level as estimated earlier.

Total cotton consumption estimated by CAI during the ongoing 2025-26 crop year is higher by 29.00 lakh bales than the 319.00 lakh bales estimated during the previous year.

Up to 31st July 2026, cotton consumption is estimated at 290.00 lakh bales of 170 kgs. each (equivalent to 304.32 lakh running bales of 162 kgs. each).

3. IMPORTS

CAI has increased its estimate of cotton imports into India during the 2025-26 season by 2.00 lakh bales to 62.00 lakh bales of 170 kgs. each (equivalent to 65.06 lakh running bales of 162 kgs. each), from 60.00 lakh bales estimated earlier.

The cotton imports estimated by CAI for the ongoing 2025-26 season are higher by 21.00 lakh bales than the 41.00 lakh bales estimated for the previous year.

Up to 31st July 2026, about 54.00 lakh bales of 170 kgs. each (equivalent to 56.67 lakh running bales of 162 kgs. each) are estimated to have arrived at Indian ports.

4. EXPORTS

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), at the same level as estimated earlier.

The cotton exports estimated by CAI for the ongoing 2025-26 season are lower by 3.00 lakh bales than the 18.00 lakh bales estimated for the previous year.

Up to 31st July 2026, about 12.25 lakh bales of 170 kgs. each (equivalent to 12.85 lakh running bales of 162 kgs. each) are estimated to have been shipped by the country.

5. TOTAL COTTON SUPPLY

Total cotton supply till the end of the 2025-26 season, i.e. up to 30th September 2026, is estimated at 456.59 lakh bales of 170 kgs. each (equivalent to 479.14 lakh running bales of 162 kgs. each), as against 392.59 lakh bales estimated for the previous year.

The total cotton supply estimated for the ongoing 2025-26 crop year consists of opening stock of 55.59 lakh bales, cotton pressing of 339.00 lakh bales and imports of 62.00 lakh bales.

6. AVAILABLE SURPLUS

Total available surplus, i.e. total supply of 456.59 lakh bales less total domestic demand of 348.00 lakh bales, works out to 108.59 lakh bales of 170 kgs. each (equivalent to 113.95 lakh running bales of 162 kgs. each) at the end of the 2025-26 season, as against 73.59 lakh bales during the previous year.

7. CLOSING STOCK AS AT 30TH SEPTEMBER 2026

The closing stock at the end of the 2025-26 season on 30th September 2026 is increased by 4.00 lakh bales to 93.59 lakh bales of 170 kgs. each (equivalent to 98.21 lakh running bales of 162 kgs. each), from 89.59 lakh bales estimated earlier.

The closing stock of 93.59 lakh bales is higher by 38.00 lakh bales than the closing stock of 55.59 lakh bales as at 30th September 2025.

The closing stock as on 31st July 2026 is estimated at 140.24 lakh bales of 170 kgs. each (equivalent to 147.17 lakh running bales of 162 kgs. each). This consists of 87.00 lakh bales with textile mills and 53.24 lakh bales with CCI, Maharashtra Federation, MNCs, ginneries, traders, etc., including cotton sold but not delivered.

Vinay N. Kotak
President

Atul S. Ganatra
Chairman, CAI Crop Committee

Mumbai

Date: 11th August 2026



COTTON ASSOCIATION OF INDIA

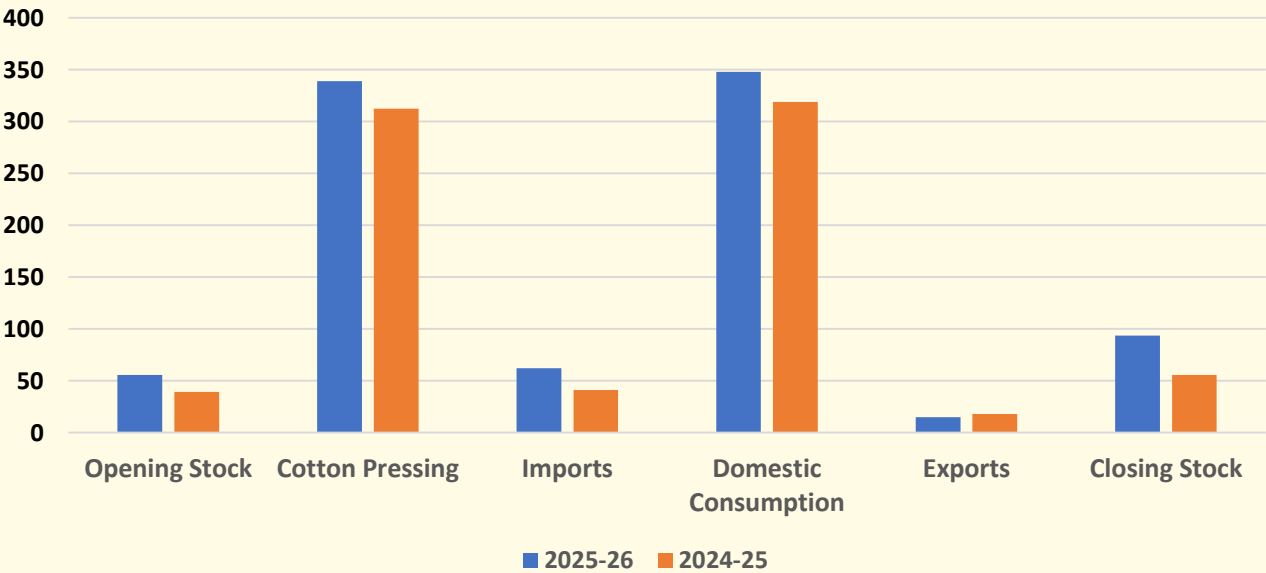
INDIAN COTTON BALANCE SHEET FOR THE SEASON 2024-25 AND 2025-26

Estimated as on 31st Jul 2026

All Figures in Lakh Bales of 170 Kg

Season	2025-26		2024-25	Change	
Details	Jun-26	Jul-26		Monthly	Yearly
Supply					
Opening Stock	55.59	55.59	39.19		16.40
Cotton Pressing	337.00	339.00	312.40	2.00	26.60
Imports	60.00	62.00	41.00	2.00	21.00
Total Supply	452.59	456.59	392.59	4.00	64.00
Demand					
Non-MSME Consumption	231.00	231.00	215.00		16.00
MSME Consumption	101.00	101.00	89.00		12.00
Non-Textile Consumption	16.00	16.00	15.00		1.00
Total Domestic Demand	348.00	348.00	319.00		29.00
Available Surplus	104.59	108.59	73.59	4.00	35.00
Exports	15.00	15.00	18.00		-3.00
Closing Stock	89.59	93.59	55.59	4.00	38.00
Note-The CAI's above estimates are +/- 3%					

Indian Cotton Comparative Balancesheet





COTTON ASSOCIATION OF INDIA

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

Estimated as on 31st Jul 2026

State	As on 31st Jul 2026			As on 30th Jun 2026		2024-25	
				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		1.50	
Haryana	6.52	0.48	7.00	7.00		8.05	-1.05
Upper Rajasthan	11.42	0.33	11.75	12.00	-0.25	10.35	1.40
Lower Rajasthan	8.42	0.33	8.75	8.50	0.25	9.65	-0.90
Total	27.66	1.34	29.00	29.00		29.55	-0.55
Central Zone							
Gujarat	68.01	1.99	70.00	70.00		77.00	-7.00
Maharashtra	117.04	1.46	118.50	118.00	0.50	91.00	27.50
Madhya Pradesh	17.50	0.50	18.00	17.50	0.50	19.00	-1.00
Total	202.55	3.95	206.50	205.50	1.00	187.00	19.50
South Zone							
Telangana	42.09	0.91	43.00	43.00		48.75	-5.75
Andhra Pradesh	20.70	0.30	21.00	21.00		13.25	7.75
Karnataka	27.95	0.55	28.50	28.00	0.50	24.00	4.50
Tamil Nadu	5.36	0.14	5.50	5.00	0.50	4.00	1.50
Total	96.10	1.90	98.00	97.00	1.00	90.00	8.00
Orissa	3.42	0.08	3.50	3.50		3.85	-0.35
Others	2.00		2.00	2.00		2.00	
Grand Total	331.73	7.27	339.00	337.00	2.00	312.40	26.60

* 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 31st Jul 2026

	Cumulative Pressings		Monthly Change	Daily Average Pressing		Cumulative Pressings	Yearly Change
	31-07-26	30-06-26		Monthly	Cumulative	31-07-25	
	Lakh Bales of 170 Kg			170 Kg Bales		Lakh Bales of 170 Kg	

North Zone

Punjab	1.50	1.50	0.00	0	493	1.50	0.00
Haryana	6.85	6.85	0.00	0	2,253	7.50	-0.65
Upper Rajasthan	11.30	11.30	0.00	0	3,717	10.10	1.20
Lower Rajasthan	8.60	8.60	0.00	0	2,829	9.40	-0.80
Total	28.25	28.25	0.00	0	9,293	28.50	-0.25

Central Zone

Gujarat	68.39	67.86	0.53	1,710	22,497	76.20	-7.81
Maharashtra	118.01	116.60	1.41	4,548	38,819	89.25	28.76
Madhya Pradesh	17.50	17.40	0.10	323	5,757	18.40	-0.90
Total	203.90	201.86	2.04	6,581	67,072	183.85	20.05

South Zone

Telangana	43.00	43.00	0.00	0	14,145	48.02	-5.02
Andhra Pradesh	20.00	19.57	0.43	1,387	6,579	10.57	9.43
Karnataka	27.70	26.90	0.80	2,581	9,112	22.70	5.00
Tamil Nadu	4.55	3.30	1.25	4,032	1,497	2.75	1.80
Total	95.25	92.77	2.48	8,000	31,332	84.04	11.21
Orissa	3.50	3.50	0.00	0	1,151	3.85	-0.35
Others	2.00	2.00	0.00	0	658	2.00	0.00
Grand Total	332.90	328.38	4.52	14,581	1,09,507	302.24	30.66

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



COTTON ASSOCIATION OF INDIA

Balance Sheet of 10 months

From 01-Oct-2025 to 31-Jul-2026

Details	In Lakh Bales of 170 kg	in '000 Tons
Opening Stock as on 01-Oct-2025	55.59	945.03
Pressings upto 31-Jul-2026	332.90	5,659.30
Imports upto 31-Jul-2026	54.00	918.00
Total Available	442.49	7,522.33
Consumption	290.00	4,930.00
Export Shipments upto 31-Jul-2026	12.25	208.25
Stock with Mills	87.00	1,479.00
Stock with CCI, Maha. Fedn., MNCs, Ginners, Traders & Exporters	53.24	905.08
Total	442.49	7,522.33

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

CAI Services



**Cotton Testing
Laboratories**



**Maintain Indian
Cotton Grade
Standard**



**Indian Cotton
Spot Rate**



**Arbitration and
Conciliation
Mechanism**



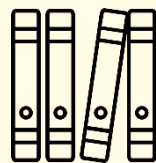
**Cotton Research
and
Development**



**Issue Certificate
of Origin**



**Indian Cotton
Statistics**



Publications