



**COTTON
ASSOCIATION
OF INDIA**

Established 1921

ISO 9001:2015

COTTON ASSOCIATION OF INDIA

MONTHLY REPORT

NOVEMBER 2025

ALL INDIA ARRIVALS

STATEWISE CROP ESTIMATES

INDIAN COTTON BALANCE SHEET



President CAI



COTTON ASSOCIATION OF INDIA



CAI Crop Committee
Chairman

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PRESS RELEASE

CAI PEGS INDIA'S COTTON PRESSING ESTIMATE FOR 2025-26 SEASON AT 309.50 LAKH BALES +/- 3%

Cotton Association of India (CAI) has released its latest estimate of the cotton pressing numbers for 2025-26 season, which began on 1st October 2025. Based on input received from the members of 11 cotton growing state associations and other trade sources, the Association has increased its cotton pressing estimate for 2025-26 season by 4.50 lakh bales and estimated the same at 309.50 lakh bales of 170 kgs. each (equivalent to 324.78 lakh running bales of 162 kgs. each) +/- 3%. 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 supply for the month of November 2025 is estimated at 148.37 lakh bales of 170 kgs. each (equivalent to 155.70 lakh running bales of 162 kgs. each) which consists of the cotton pressing of 69.78 lakh bales of 170 kgs. each (equivalent to 73.23 lakh running bales of 162 kgs. each), imports of 18.00 lakh bales of 170 kgs. each (equivalent to 18.89 lakh running bales of 162 kgs. each) and the opening stock estimated by the CAI at 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.

Further, the CAI has estimated cotton consumption for the month of November 2025 at 48.40 lakh bales of 170 kgs. each (equivalent to 50.79 lakh running bales of 162 kgs. each) while the export shipments upto 30th November 2025 are estimated by the CAI at 3.00 lakh bales of 170 kgs. each. Stock at the end of November 2025 is estimated at 96.97 lakh bales

of 170 kgs. each (equivalent to 101.76 lakh running bales of 162 kgs. each) including 50.00 lakh bales of 170 kgs. each (equivalent to 52.47 lakh running bales of 162 kgs. each) with textile mills and the remaining 46.97 lakh bales of 170 kgs. each (equivalent to 49.29 lakh running bales of 162 kgs. each) with CCI, Maharashtra Federation and others (MNCs, traders, ginneries, exporters, etc.) including cotton sold but not delivered.

The total cotton supply till end of the cotton season 2025-26 (i.e. upto 30th September 2026) is estimated at 420.09 lakh bales of 170 kgs. each (equivalent to 440.84 lakh running bales of 162 kgs. each) as against the last year's total cotton supply of 392.59 lakh bales of 170 kgs. each (equivalent to 411.98 lakh running bales of 162 kgs. each). The estimated cotton supply for the ongoing 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 2025-26 season on 1st October 2025, cotton pressing numbers estimated for the season at 309.50 lakh bales of 170 kgs. each (equivalent to 324.78 lakh running bales of 162 kgs. each) and imports for the season estimated at 50.00 lakh bales of 170 kgs. each (equivalent to 52.47 lakh running bales of 162 kgs. each). The cotton imports estimated by the CAI for the season are higher by 9.00 lakh bales of 170 kgs. each compared to last year. The domestic consumption is estimated at 295.00 lakh bales of 170 kgs. each (equivalent to 309.57 lakh running bales of 162 kgs. each). The exports for the season 2025-26 are estimated at 18.00 lakh bales of 170 kgs. each (equivalent to 18.89 lakh running bales of 162 kgs. each) i.e. same as estimated for 2024-25 season.

SALIENT FEATURES OF THE CAI CROP COMMITTEE MEETING HELD ON 5TH DECEMBER 2025

The Crop Committee of the Cotton Association of India (CAI) held its meeting on Friday, the 5th December 2025 virtually, which was attended by 18 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 2025-26 season and has also drawn cotton balance sheet for 2025-26 season.

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

1. CONSUMPTION

The CAI has estimated total cotton consumption during 2025-26 season i.e. upto 30th September 2026 at 295.00 lakh bales of 170 kgs. each (equivalent to 309.57 lakh running bales of 162 kgs. each) as against 314.00 lakh bales of 170 kgs. each (equivalent to 329.51 lakh running bales of 162 kgs. each) in last year.

Upto 30th November 2025, the consumption is estimated at 48.40 lakh bales of 170 kgs. each (equivalent to 50.79 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 2025-26 season are increased by 4.50 lakh bales and estimated the same at 309.50 lakh bales of 170 kgs. each (equivalent to 324.78 lakh running bales of 162 kgs. each) +/-3% from 305.00 lakh bales of 170 kgs. each estimated previously.

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 (-)
Gujarat	+3.00
Maharashtra	+3.00
Telangana	-2.50
Karnataka	+1.00
TOTAL	+4.50

The Committee members will have a close watch on the pressing numbers of cotton 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 reports of the subsequent months.

3. IMPORTS

The CAI has increased its cotton imports for the 2025-26 season by 5.00 lakh bales to 50.00 lakh bales of 170 kgs. each (equivalent to 52.47 lakh running bales of 162 kgs. each) from 45.00 lakh bales of 170 kgs. each estimated previously.

The cotton imports estimated by the CAI for the season are higher by 9.00 lakh bales of 170 kgs. each than 41.00 lakh bales of 170 kgs. each estimated for the last year.

Upto 30th November 2025, about 18.00 lakh bales of 170 kgs. each (equivalent to 18.89 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 2025-26 season by 1.00 lakh bales 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 estimated previously.

The cotton exports for 2025-26 crop year are maintained at the same level as estimated last crop year.

Upto 30th November 2025, about 3.00 lakh bales of 170 kgs. each (equivalent to 3.15 lakh running bales of 162 kgs. each) are estimated to have been shipped by the country.

5. CLOSING STOCK AS AT 30TH SEPTEMBER 2026

The closing stock at the end of 2025-26 season on 30th September 2026 is estimated at 107.09 lakh bales of 170 kgs. each (equivalent to 112.38 lakh running bales of 162 kgs. each) which is higher by 46.50 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.

Vinay N. Kotak

President

Atul S. Ganatra

Chairman, CAI Crop Committee

Mumbai

Date: 06th December 2025



COTTON ASSOCIATION OF INDIA

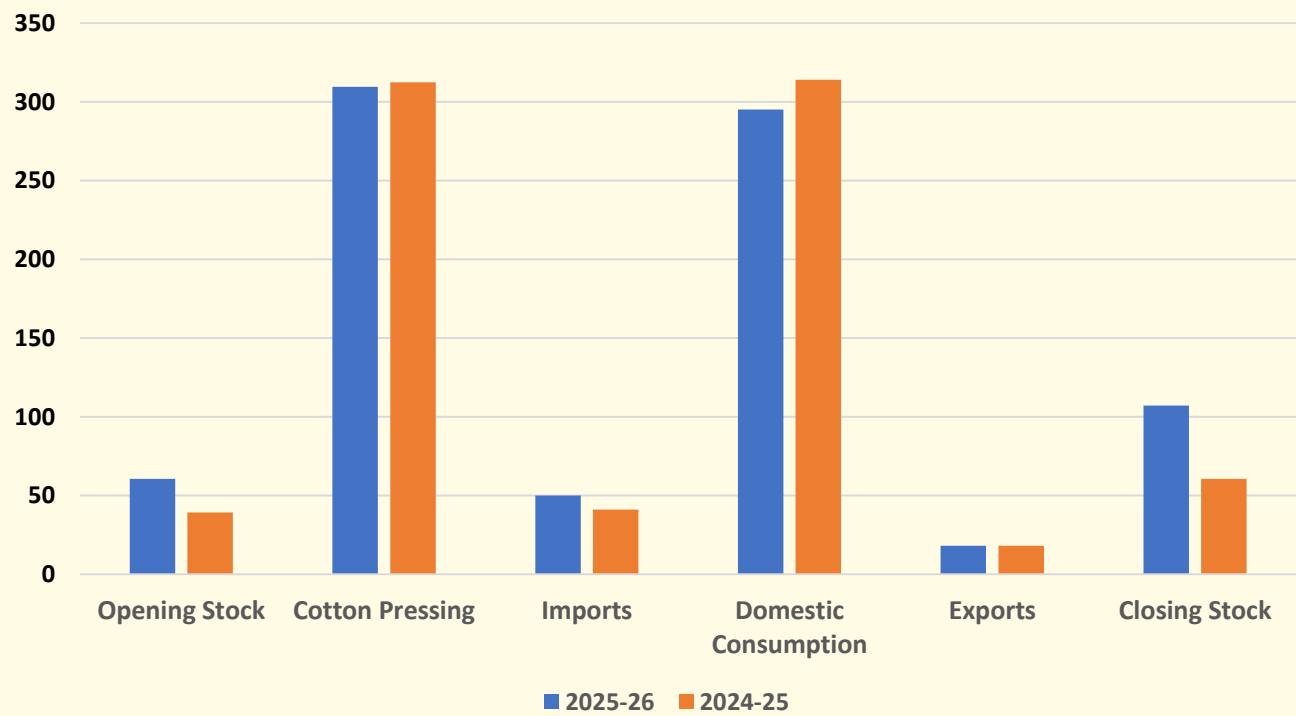
INDIAN COTTON BALANCE SHEET FOR THE SEASON 2024-25 AND 2025-26

Estimated as on 30th November 2025

All Figures in Lakh Bales of 170 Kg

Season	2025-26		2024-25	Change	
Details	Oct-25	Nov-25		Monthly	Yearly
Supply					
Opening Stock	60.59	60.59	39.19		21.40
Cotton Pressing	305.00	309.50	312.40	4.50	-2.90
Imports	45.00	50.00	41.00	5.00	9.00
Total Supply	410.59	420.09	392.59	9.50	27.50
Demand					
Non-MSME Consumption	210.00	210.00	210.00		
MSME Consumption	80.00	73.00	89.00	-7.00	-16.00
Non-Textile Consumption	10.00	12.00	15.00	2.00	-3.00
Total Domestic Demand	300.00	295.00	314.00	-5.00	-19.00
Available Surplus	110.59	125.09	78.59	14.50	46.50
Exports	17.00	18.00	18.00	1.00	
Closing Stock	93.59	107.09	60.59	13.50	46.50
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 30th November 2025

State	As on 30th Nov 2025			As on 31st Oct 2025		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	1.80	0.20	2.00	2.00		1.50	0.50
Haryana	6.52	0.48	7.00	7.00		8.05	-1.05
Upper Rajasthan	12.17	0.33	12.50	12.50		10.35	2.15
Lower Rajasthan	8.67	0.33	9.00	9.00		9.65	-0.65
Total	29.16	1.34	30.50	30.50		29.55	0.95
Central Zone							
Gujarat	73.01	1.99	75.00	72.00	3.00	77.00	-2.00
Maharashtra	89.54	1.46	91.00	88.00	3.00	91.00	
Madhya Pradesh	18.50	0.50	19.00	19.00		19.00	
Total	181.05	3.95	185.00	179.00	6.00	187.00	-2.00
South Zone							
Telangana	39.59	0.91	40.50	43.00	-2.50	48.75	-8.25
Andhra Pradesh	16.70	0.30	17.00	17.00		13.25	3.75
Karnataka	25.45	0.55	26.00	25.00	1.00	24.00	2.00
Tamil Nadu	4.36	0.14	4.50	4.50		4.00	0.50
Total	86.10	1.90	88.00	89.50	-1.50	90.00	-2.00
Orissa	3.92	0.08	4.00	4.00		3.85	0.15
Others	2.00		2.00	2.00		2.00	
Grand Total	302.23	7.27	309.50	305.00	4.50	312.40	-2.90

* 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 30th November 2025

	Cumulative Pressings		Monthly Change	Daily Average Pressing		Cumulative Pressings	Yearly Change
	30-11-25	31-10-25		Monthly	Cumulative	30-11-24	
	Lakh Bales of 170 Kg			170 Kg Bales		Lakh Bales of 170 Kg	
North Zone							
Punjab	0.65	0.35	0.30	1,000	1,066	0.40	0.25
Haryana	2.50	1.00	1.50	5,000	4,098	2.60	-0.10
Upper Rajasthan	4.60	2.00	2.60	8,667	7,541	2.40	2.20
Lower Rajasthan	5.05	2.75	2.30	7,667	8,279	3.60	1.45
Total	12.80	6.10	6.70	22,333	20,984	9.00	3.80
Central Zone							
Gujarat	13.55	4.78	8.77	29,233	22,213	12.93	0.62
Maharashtra	10.11	1.44	8.67	28,900	16,574	9.53	0.58
Madhya Pradesh	5.00	1.50	3.50	11,667	8,197	5.15	-0.15
Total	28.66	7.72	20.94	69,800	46,984	27.61	1.05
South Zone							
Telangana	8.58	1.75	6.83	22,767	14,066	17.26	-8.68
Andhra Pradesh	7.56	4.06	3.50	11,667	12,393	4.25	3.31
Karnataka	11.00	4.50	6.50	21,667	18,033	10.25	0.75
Tamil Nadu	0.45	0.20	0.25	833	738	0.40	0.05
Total	27.59	10.51	17.08	56,933	45,230	32.16	-4.57
Orissa	0.08	0.00	0.08	267	131	0.15	-0.07
Others	0.65	0.25	0.40	1,333	1,066	0.30	0.35
Grand Total	69.78	24.58	45.20	1,50,667	1,14,393	69.22	0.56
Note:- The CAI's above estimates are +/- 3%							



COTTON ASSOCIATION OF INDIA

Balance Sheet of 02 months

From 01-Oct-2025 to 30-Nov-2025

Details	In Lakh Bales of 170 kg	in '000 Tons
Opening Stock as on 01-Oct-2025	60.59	1,030.03
Pressings upto 30-November-2025	69.78	1,186.26
Imports upto 30-November-2025	18.00	306.00
Total Available	148.37	2,522.29
Consumption	48.40	822.80
Export Shipments upto 30-November-2025	3.00	51.00
Stock with Mills	50.00	850.00
Stock with CCI, Maha. Fedn., MNCs, Ginners, Traders & Exporters	46.97	798.49
Total	148.37	2,522.29
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**



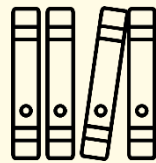
**Cotton Research
and
Development**



**Issue Certificate
of Origin**



**Indian Cotton
Statistics**



Publications