



**COTTON
ASSOCIATION
OF INDIA**

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COTTON ASSOCIATION OF INDIA

MONTHLY REPORT

DECEMBER 2025

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 2025-26 SEASON TO 317.00 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 Tuesday, the 13th January 2026 virtually which was attended by 22 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 estimate of each state for 2025-26 season and also drawn cotton balance sheets till the end of December 2025 and upto the end of ongoing crop year 2025-26 ending on 30th September 2026. The state-wise break-up of cotton pressing numbers as well as balance sheets as 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 7.50 lakh bales to 317

lakh bales of 170 kgs. each (equivalent to 332.65 lakh running bales of 162 kgs. each) +/- 3% from 309.50 lakh bales of 170 kgs. each (equivalent to 324.78 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 (-)
Maharashtra	+3.00
Madhya Pradesh	-1.00
Telangana	+4.50
Karnataka	+1.00
Tamil Nadu	+0.50
Orissa	-0.50
TOTAL	+7.50

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 estimated India’s total cotton consumption during 2025-26 i.e. upto 30th September 2026 at 305.00 lakh bales of 170 kgs. each (equivalent to 320.06 lakh running bales of 162 kgs. each) as against 314 lakh bales of 170 kgs. each (equivalent to 329.51 lakh running bales of 162 kgs. each) in last year.

Upto 31st December 2025, cotton consumption is estimated at 76..25 lakh bales of 170 kgs. each (equivalent to 80.02 lakh running bales of 162 kgs. each).

3. IMPORTS

The CAI has maintained its estimate of cotton imports into India during 2025-26 season at 50.00 lakh bales of 170 kgs. each (equivalent to 52.47 lakh running bales of 162 kgs. each) i.e. same as estimated previously.

The cotton imports estimated by the CAI for the ongoing 2025-26 season are higher by 9 lakh bales of 170 kgs. each than 41.00 lakh bales of 170 kgs. each estimated for the last year.

Upto 31st December 2025, about 31.00 lakh bales of 170 kgs. each (equivalent to 32.53 lakh running bales of 162 kgs. each) are estimated to have arrived the Indian ports.

4. EXPORTS

The CAI has decreased its cotton exports estimate for the 2025-26 season by 3.00 lakh bales to 15.00 lakh bales of 170 kgs. each (equivalent to 15.74 lakh running bales of 162 kgs each) from 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 31st December 2025, about 4.50 lakh bales of 170 kgs. each (equivalent to 4.72 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 427.59 lakh bales of 170 kgs. each (equivalent to 448.71 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 317.00 lakh bales of 170 kgs. each and imports for the season estimated at 50.00 lakh bales of 170 kgs. each.

Total cotton availability till end December 2025 is estimated at 246.78 lakh bales of 170 kgs. each (equivalent to 258.97 lakh running bales of 162 kgs. each) and the same consists of the opening stock of 60.59 lakh at the beginning of the season on 1st October 2025, cotton pressing estimated at 155.19 lakh bales of 170 kgs. each upto 31st December 2025 and imports of 31.00 lakh bales estimated till end December 2025.

6. AVAILABLE SURPLUS

Total available surplus (i.e. total supply of 427.59 lakh bales less total domestic demand estimated at 305 lakh bales of 170 kgs. each) works out to 122.59 lakh bales of 170 kgs. each (equivalent to 128.64 lakh running bales of 162 kgs. each)

at the end of 2025-26 season 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 estimated at 107.59 lakh bales of 170 kgs. each (equivalent to 112.90 lakh running bales of 162 kgs. each) which is higher by 47.00 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 31st December 2025 is estimated at 166.03 lakh bales of 170 kgs. each (equivalent to 174.23 lakh running bales of 162 kgs. each), which consists of 66.00 lakh bales of 170 kgs. each (equivalent to 69.26 lakh running bales of 162 kgs. each) with textile mills and 100.03 lakh bales of 170 kgs. each (equivalent to 104.97 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: 14th January 2026



COTTON ASSOCIATION OF INDIA

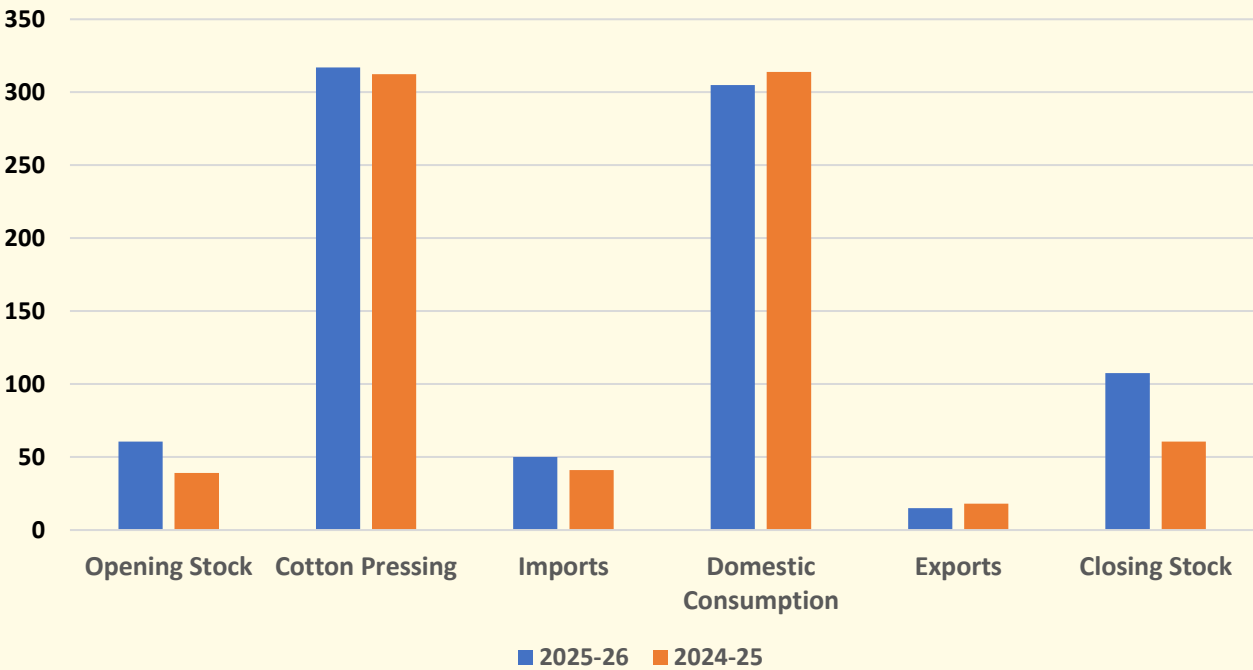
INDIAN COTTON BALANCE SHEET FOR THE SEASON 2024-25 AND 2025-26

Estimated as on 31st December 2025

All Figures in Lakh Bales of 170 Kg

Season	2025-26		2024-25	Change	
Details	Nov-25	Dec-25		Monthly	Yearly
Supply					
Opening Stock	60.59	60.59	39.19		21.40
Cotton Pressing	309.50	317.00	312.40	7.50	4.60
Imports	50.00	50.00	41.00		9.00
Total Supply	420.09	427.59	392.59	7.50	35.00
Demand					
Non-MSME Consumption	210.00	216.00	210.00	6.00	6.00
MSME Consumption	73.00	73.00	89.00		-16.00
Non-Textile Consumption	12.00	16.00	15.00	4.00	1.00
Total Domestic Demand	295.00	305.00	314.00	10.00	-9.00
Available Surplus	125.09	122.59	78.59	-2.50	44.00
Exports	18.00	15.00	18.00	-3.00	-3.00
Closing Stock	107.09	107.59	60.59	0.50	47.00
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 December 2025

State	As on 31st Dec 2025			As on 30th Nov 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	75.00		77.00	-2.00
Maharashtra	92.54	1.46	94.00	91.00	3.00	91.00	3.00
Madhya Pradesh	17.50	0.50	18.00	19.00	-1.00	19.00	-1.00
Total	183.05	3.95	187.00	185.00	2.00	187.00	
South Zone							
Telangana	44.09	0.91	45.00	40.50	4.50	48.75	-3.75
Andhra Pradesh	16.70	0.30	17.00	17.00		13.25	3.75
Karnataka	26.45	0.55	27.00	26.00	1.00	24.00	3.00
Tamil Nadu	4.86	0.14	5.00	4.50	0.50	4.00	1.00
Total	92.10	1.90	94.00	88.00	6.00	90.00	4.00
Orissa	3.42	0.08	3.50	4.00	-0.50	3.85	-0.35
Others	2.00		2.00	2.00		2.00	
Grand Total	309.73	7.27	317.00	309.50	7.50	312.40	4.60

* 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 December 2025

	Cumulative Pressings		Monthly Change	Daily Average Pressing		Cumulative Pressings	Yearly Change
	31-12-25	30-11-25		Monthly	Cumulative	31-12-24	
	Lakh Bales of 170 Kg			170 Kg Bales		Lakh Bales of 170 Kg	
North Zone							
Punjab	1.05	0.65	0.40	1,290	1,141	0.67	0.38
Haryana	4.30	2.50	1.80	5,806	4,674	3.98	0.32
Upper Rajasthan	7.35	4.60	2.75	8,871	7,989	4.75	2.60
Lower Rajasthan	6.60	5.05	1.55	5,000	7,174	6.05	0.55
Total	19.30	12.80	6.50	20,968	20,978	15.45	3.85
Central Zone							
Gujarat	26.98	13.55	13.43	43,323	29,326	25.21	1.77
Maharashtra	37.27	10.11	27.16	87,613	40,511	26.83	10.44
Madhya Pradesh	9.80	5.00	4.80	15,484	10,652	9.60	0.20
Total	74.05	28.66	45.39	1,46,419	80,489	61.64	12.41
South Zone							
Telangana	29.53	8.58	20.95	67,581	32,098	32.86	-3.33
Andhra Pradesh	12.06	7.56	4.50	14,516	13,109	6.40	5.66
Karnataka	17.10	11.00	6.10	19,677	18,587	14.80	2.30
Tamil Nadu	0.65	0.45	0.20	645	707	0.70	-0.05
Total	59.34	27.59	31.75	1,02,419	64,500	54.76	4.58
Orissa	1.35	0.08	1.27	4,097	1,467	1.30	0.05
Others	1.15	0.65	0.50	1,613	1,250	0.70	0.45
Grand Total	155.19	69.78	85.41	2,75,516	1,68,685	133.85	21.34
Note-The CAI's above estimates are +/- 3%							



COTTON ASSOCIATION OF INDIA

Balance Sheet of 03 months

From 01-Oct-2025 to 31-Dec-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 31-December-2025	155.19	2,638.23
Imports upto 31-December-2025	31.00	527.00
Total Available	246.78	4,195.26
Consumption	76.25	1,296.25
Export Shipments upto 31-December-2025	4.50	76.50
Stock with Mills	66.00	1,122.00
Stock with CCI, Maha. Fedn., MNCs, Ginners, Traders & Exporters	100.03	1,700.51
Total	246.78	4,195.26
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**



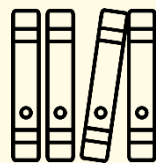
**Cotton Research
and
Development**



**Issue Certificate
of Origin**



**Indian Cotton
Statistics**



Publications