



**COTTON
ASSOCIATION
OF INDIA**

Established 1921

ISO 9001:2015

COTTON ASSOCIATION OF INDIA

MONTHLY REPORT MAY 2025

ALL INDIA ARRIVALS

STATEWISE CROP ESTIMATES

INDIAN COTTON BALANCE SHEET



COTTON ASSOCIATION OF INDIA

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PRESS RELEASE

CAI NATIONAL CROP COMMITTEE AND STAKEHOLDERS MET IN MUMBAI ON 18TH JUNE 2025 – ESTIMATED COTTON PRESSINGS/CROP FOR 2024-25 SEASON AT 301.15 LAKH BALES OF 170 KGS. EACH

As notified previously, Cotton Association of India (CAI) convened an all India meeting of its National Crop Committee with all stakeholders in Mumbai on Wednesday, the 18th June 2025.

This meeting was attended by 52 members including CAI Crop Committee members, Presidents/Secretaries of all 11 upcountry State Associations, Mill Members, MNCs, Exporters, Importers, Traders, Brokers and other prominent personalities from cotton and textile value chain in India.

After detailed deliberations and based on the pressing data of various states received from respective state Associations and feedback from all stakeholders, the Committee, by consensus, arrived at the total cotton pressings/crop estimate for the ongoing 2024-25 season at 301.15 lakh bales of 170 kgs. each (equivalent to 316.02 lakh running bales of 162 kgs. each) Further, based on the feedback from the stakeholders, the Committee drew cotton balance sheet for eight months i.e. upto 31st May 2025 and also for the entire season ending 30th September 2025. The cotton pressing estimates and cotton balance sheets with corresponding data for previous year are enclosed herewith: -

1. ESTIMATES OF COTTON PRESSINGS/CROP FOR 2024-25 SEASON
2. BALANCE SHEET FOR 2024-25 SEASON AS ON 30TH SEPTEMBER 2025
3. MONTHLY BALANCE SHEET FOR OCTOBER 2024 TO MAY 2025
4. STATE-WISE STOCK AS ON 31ST MAY 2025

Shri Suresh Kotak, Chairman of Textile Advisory Group and the Chairman of Kotak Group of Companies, who also attended the meeting, shared his invaluable views and suggestions.

The stakeholders representing the entire cotton trade and textile industry, who were present at the meeting, highlighted that rising Minimum Support Prices (MSP) for cotton, year after year, are causing problems. Higher MSPs not only distort market dynamism and hinder the natural price discovery process but also increase production cost for textile mills, leading to potentially higher prices for consumers and also adversely impact the competitiveness of Indian cotton production in the global market. As this poses threat to the survival of entire value chain, stakeholders exhorted the need for finding an equitable solution for the continue providing remunerative prices to the farmers but without compromising the competitiveness of the trade and industry. Several suggestions including the need of introducing a Bhavantar like scheme and also for making a few changes in the CCI sales policy were given at the meeting. Shri Kotak appreciated the concern of stakeholders and acknowledged the need for making suitable changes in the MSP structure and also the CCI sales policy. He noted the suggestions and stated that he would take up the same suitably with the Government.

Mumbai

Date: 19th June 2025

Atul S. Ganatra

President



COTTON ASSOCIATION OF INDIA

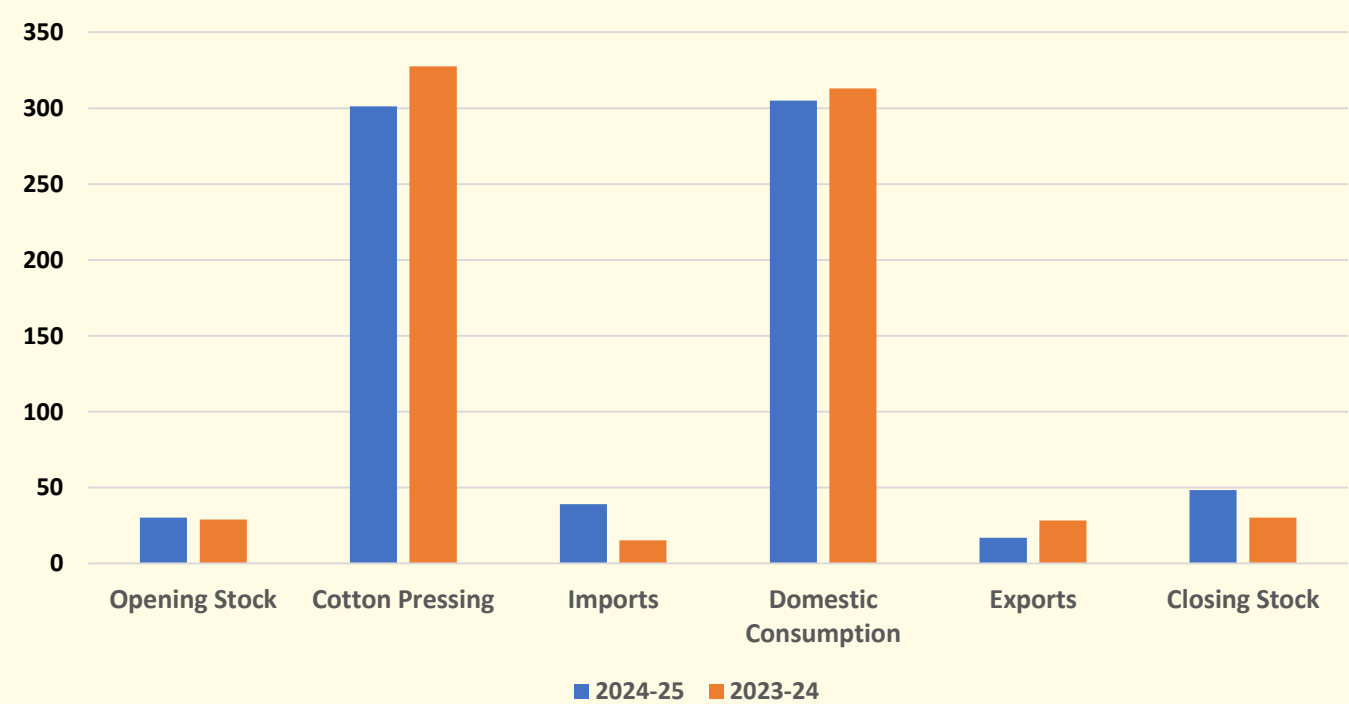
INDIAN COTTON BALANCE SHEET FOR THE SEASON 2023-24 AND 2024-25

Estimated as on 31st May 2025

All Figures in Lakh Bales of 170 Kg

Season	2024-25		2023-24	Change	
Details	Apr-25	May-25		Monthly	Yearly
Supply					
Opening Stock	30.19	30.19	28.90		1.29
Cotton Pressing	291.35	301.15	327.45	9.80	-26.30
Imports	33.00	39.00	15.20	6.00	23.80
Total Supply	354.54	370.34	371.55	15.80	-1.21
Demand					
Non-MSME Consumption	197.00	197.00	201.00		-4.00
MSME Consumption	94.00	92.00	96.00	-2.00	-4.00
Non-Textile Consumption	16.00	16.00	16.00		
Total Domestic Demand	307.00	305.00	313.00	-2.00	-8.00
Available Surplus	47.54	65.34	58.55	17.80	6.79
Exports	15.00	17.00	28.36	2.00	-11.36
Closing Stock	32.54	48.34	30.19	15.80	18.15

Indian Cotton Comparative Balancesheet





COTTON ASSOCIATION OF INDIA

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

Estimated as on 31st May 2025

State	As on 31st May 2025			As on 30th Apr 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	7.32	0.48	7.80	7.80		13.30	-5.50
Upper Rajasthan	9.77	0.33	10.10	9.60	0.50	15.47	-5.37
Lower Rajasthan	9.07	0.33	9.40	8.60	0.80	13.20	-3.80
Total	27.46	1.34	28.80	27.50	1.30	45.62	-16.82
Central Zone							
Gujarat	74.01	1.99	76.00	71.00	5.00	90.50	-14.50
Maharashtra	83.54	1.46	85.00	82.00	3.00	92.71	-7.71
Madhya Pradesh	18.50	0.50	19.00	19.00		19.00	
Total	176.05	3.95	180.00	172.00	8.00	202.21	-22.21
South Zone							
Telangana	47.09	0.91	48.00	48.00		35.00	13.00
Andhra Pradesh	11.20	0.30	11.50	11.00	0.50	13.00	-1.50
Karnataka	22.45	0.55	23.00	23.00		21.60	1.40
Tamil Nadu	3.86	0.14	4.00	4.00		4.25	-0.25
Total	84.60	1.90	86.50	86.00	0.50	73.85	12.65
Orissa	3.77	0.08	3.85	3.85		3.77	0.08
Others	2.00		2.00	2.00		2.00	
Grand Total	293.88	7.27	301.15	291.35	9.80	327.45	-26.30

* 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.



COTTON ASSOCIATION OF INDIA

ALL INDIA COTTON PRESSINGS

As on 31st May 2025

	Cumulative Pressings		Monthly Change	Daily Average Pressing		Cumulative Pressings	Yearly Change
	31-05-25	30-04-25		Monthly	Cumulative	31-05-24	
	Lakh Bales of 170 Kg			170 Kg Bales		Lakh Bales of 170 Kg	
North Zone							
Punjab	1.50	1.50	0.00	0	617	3.65	-2.15
Haryana	7.26	6.98	0.28	903	2,988	12.51	-5.25
Upper Rajasthan	9.96	9.77	0.19	613	4,099	15.36	-5.40
Lower Rajasthan	9.30	8.60	0.70	2,258	3,827	13.18	-3.88
Total	28.02	26.85	1.17	3,774	11,531	44.70	-16.68
Central Zone							
Gujarat	73.05	66.29	6.76	21,806	30,062	81.04	-7.99
Maharashtra	79.85	72.04	7.81	25,194	32,860	81.65	-1.80
Madhya Pradesh	17.90	17.65	0.25	806	7,366	17.45	0.45
Total	170.80	155.98	14.82	47,806	70,288	180.14	-9.34
South Zone							
Telangana	47.57	47.35	0.22	710	19,576	34.09	13.48
Andhra Pradesh	10.00	9.75	0.25	806	4,115	11.30	-1.30
Karnataka	21.20	20.92	0.28	903	8,724	19.50	1.70
Tamil Nadu	1.65	1.50	0.15	484	679	1.10	0.55
Total	80.42	79.52	0.90	2,903	33,095	65.99	14.43
Orissa	3.85	3.85	0.00	0	1,584	3.70	0.15
Others	2.00	2.00	0.00	0	823	2.00	0.00
Grand Total	285.09	268.20	16.89	54,484	1,17,321	296.53	-11.44



COTTON ASSOCIATION OF INDIA

Balance Sheet of 8 months

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

Details	In Lakh Bales of 170 kg	in '000 Tons
Opening Stock as on 01-Oct-2024	30.19	513.23
Pressings upto 31-May-2025	285.09	4,846.53
Imports upto 31-May-2025	26.25	446.25
Total Available	341.53	5,806.01
Consumption	208.00	3,536.00
Export Shipments upto 31-May-2025	15.25	259.25
Stock with Mills	33.00	561.00
Stock with CCI, Maha. Fedn., MCX, MNCs, Ginners, Traders & Exporters	85.28	1,449.76
Total	341.53	5,806.01



COTTON ASSOCIATION OF INDIA

STATE-WISE UNSOLD STOCK WITH GINNERS, MNC'S
WITHOUT CCI AS ON 31ST MAY 2025

(in lakh bales of 162 kgs. each)

State	Stock
Punjab	5,000
Haryana	18,000
Rajasthan	68,000
Total North Zone	91,000
Gujarat	3,50,000
Maharashtra	3,00,000
Madhya Pradesh	1,30,000
Total Central Zone	7,80,000
Telangana	40,000
Andhra Pradesh	70,000
Karnataka	30,000
Tamil Nadu	0
Total South Zone	1,40,000
Orissa	20,000
Others	0
Grand Total	10,31,000
Total All India Stock is 10,31,000 running bales of 162 kgs. i.e. 9.80 lakh bales of 170 kgs. each	

CAI Services



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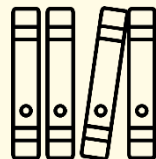
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Development**



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**Indian Cotton
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Publications