



# GUJCOT TRADE ASSOCIATION

## WEEKLY REPORT 02-Aug-2025

### Market Movement from 28th Jul 2025 to 02nd Aug 2025.

- President Trump announced tariffs on several countries, including India. This move disturbed the market and was a key reason for the negative reaction. As a result, NY December closed with a week-over-week loss of 187 points.
- Export sales were poor, but shipments were better and are likely to surpass the target set by the USDA.

U. S. Export Sales	Running Bales (494 lbs)	Statical Bales (480 lbs)	Target	Remaining RB	Remaining SB	Require SB average per week	Require RB average per week
Commitments	1,22,73,076	1,26,31,041	1,18,00,000	-8,07,489	-8,31,041		
Shipments	1,14,34,900	1,17,68,418	1,18,00,000	30,687	31,582	31,582	30,687

- In the latest U. S. Export Sales Report for the week ending 24-Jul-2025, U.S. export sales data showed net upland cotton sales of 39,100 bales and shipments of 2,30,900 bales for the 2024-2025 marketing year, while Pima sales stood at just 100 bales with shipments of 8,700 bales, bringing total sales for the current year to 39,200 bales. Meanwhile, for the 2025-2026 marketing year, forward net sales were higher, with 71,700 bales of upland cotton and 5,000 bales of Pima, totaling 76,700 bales.



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- The Gujcot Spot Rate showed a gradual downward trend. It opened at ₹57,300 on Monday, dipped slightly to ₹57,250 on Tuesday, continued declining to ₹57,150 on Wednesday, and further eased to ₹57,000 on Thursday and Friday. The rate for Saturday was ₹57,050. The overall sentiment remained weak with a weekly loss.
- The Indian physical market is also following the bearish trend seen in the international market. However, due to limited supply, the decline has been relatively limited. Despite this, overall sentiment in the Indian physical market remains bearish.
- Imported cotton is being offered at more competitive prices, and mills with purchase against advance licenses are regularly booking their requirements for the upcoming year as well.
- Indian mills are currently spinning high-cost cotton, and with the added challenge of tariffs, the U.S. market has also become difficult for them. As a result, mills are likely to face significant struggles to survive in the coming month.
- The monsoon is progressing well, resulting in a healthy crop.



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- All-India sowing has reached nearly 103 lakh hectares, with Gujarat contributing 20.168 lakh hectares.
- During this week, the Indian basis remained between 15.76 and 16.77.
- This week, the USD-INR exchange rate showed a steady upward trend. The rate opened at 86.67 on Monday, moved up to 86.81 on Tuesday, jumped significantly to 87.42 on Wednesday, continued its rise to 87.59 on Thursday, and closed slightly lower at 87.54 on Friday.
- **Hope for best**



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### Gujarat District wise Cotton Sowing

Gujarat Districtwise Cotton Sowing Till 28-July-2025			
Kutch	725	Saurashtra	14,753
Kutch	725	Surendranagar	3,791
		Rajkot	1,293
North Gujarat	1,505	Jamnagar	872
Banarsakantha	184	Porbandar	41
Patan	285	Junagadh	302
Mehsana	273	Amreli	2,662
Sabarkantha	404	Bhavnagar	2,039
Gandhinagar	173	Morbi	2,077
Aravali	186	Botad	1,512
		Gir Somnath	114
Middle Gujarat	1,777	Devbhumi Dwarka	50
Ahmedabad	316		
Anand	3	South Gujarat	1,408
Kheda	160	Surat	11
Panchmahal	85	Narmada	449
Dahod	7	Bharuch	848
Vadodara	370	Dang	0
Mahisagar	83	Navsari	0
Chota Udaipur	753	Valsad	0
		Tapi	101
TOTAL			20,168
TOTAL (Last Year)			23,152
SUMMARY			
Zone	2025-26	2024-25	Change
Kutch	725	683	42
North Gujarat	1,505	1,878	-373
Middle Gujarat	1,777	2,695	-918
Saurashtra	14,753	16,369	-1,616
South Gujarat	1,408	1,528	-120
TOTAL	20,168	23,152	-2,984
All Figures in '00 Hectares			
Source :- Agriculture, Farmers Welfare and Co-operation Department Government of Gujarat			



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## WEEKLY REPORT 02-Aug-2025

### All India Cotton Sowing

All India Cotton Sowing				
As on 02-08-2025				
STATE	(Area in Lakh Hectare)			
	2025-26	2024-25	Change	
Punjab	1.200	1.000	0.200	20.00%
Haryana	4.000	4.760	-0.760	-15.97%
Rajasthan	6.284	5.042	1.242	24.63%
<b>North India</b>	<b>11.484</b>	<b>10.802</b>	<b>0.682</b>	<b>6.31%</b>
Gujarat	20.168	23.152	-2.984	-12.89%
Maharashtra	38.014	40.642	-2.628	-6.47%
Madhya Pradesh	4.973	6.140	-1.167	-19.01%
<b>Central India</b>	<b>63.155</b>	<b>69.934</b>	<b>-6.779</b>	<b>-9.69%</b>
Telangana	17.518	16.553	0.965	5.83%
Andra Pradesh	2.940	2.360	0.580	24.58%
Karnataka	7.499	6.310	1.189	18.84%
Tamil Nadu	0.000	0.058	-0.058	-100.00%
<b>South Zone</b>	<b>27.957</b>	<b>25.281</b>	<b>2.676</b>	<b>10.59%</b>
Orissa	0.000	2.170	-2.170	-100.00%
Others	0.000	0.241	-0.241	-100.00%
<b>All India</b>	<b>102.596</b>	<b>108.428</b>	<b>-5.832</b>	<b>-5.38%</b>





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## WEEKLY REPORT

### 02-Aug-2025

Global

US Weekly Export Sales

- Net sales of UPLAND totaling 39,100 RB for 2024-2025 were down noticeably from the previous week, but up noticeably from the prior 4-week average. Increases primarily for Vietnam (27,100 RB, including 1,100 RB switched from South Korea, 300 RB switched from Hong Kong, and decreases of 100 RB), Turkey (13,200 RB), Pakistan (5,800 RB, including decreases of 500 RB), Bangladesh (3,000 RB, including decreases of 100 RB), and Honduras (1,200 RB), were offset by reductions primarily for Thailand (9,000 RB), South Korea (1,100 RB), Mexico (700 RB), Ecuador (600 RB), and Hong Kong (300 RB).
- Net UPLAND sales of 71,700 RB for 2025-2026 were primarily for Vietnam (27,400 RB), Honduras (13,800 RB), Pakistan (5,900 RB), Turkey (5,400 RB), and India (5,100 RB).
- UPLAND Exports of 2,30,900 RB were up 25 percent from the previous week and 10 percent from the prior 4-week average. The destinations were primarily to Vietnam (66,400 RB), Turkey (44,400 RB), Pakistan (32,300 RB), Bangladesh (30,500 RB), and India (16,600 RB).
- Net sales of PIMA totaling 100 RB for 2024-2025 were down 98 percent from the previous week and 97 percent from the prior 4-week average. Increases reported for Pakistan (1,400 RB), were offset by reductions for India (1,300 RB).
- Net PIMA sales of 5,000 RB for 2025-2026 were primarily for China (1,700 RB), Bangladesh (1,400 RB), India (900 RB), Indonesia (300 RB), and Bahrain (200 RB).
- PIMA Exports of 8,700 RB were up 73 percent from the previous week, but down 17 percent from the prior 4-week average. The destinations were primarily to India (4,700 RB), China (1,300 RB), Pakistan (1,000 RB), Egypt (900 RB), and Thailand (400 RB).

US Export Sales	24-Jul-2025
Marketing Year 2024-25	
Upland Gross Sales	50,900
Cancellation	11,800
Net Upland Sales	39,100
PIMA Gross Sales	1,800
Cancellation	1,700
Net PIMA Sales	100
Total Gross Sales	52,700
Total Cancellation	13,500
Total Net Sales	39,200
Shipments	
UPLAND	2,30,900
PIMA	8,700
Total Shipment	2,39,600
Marketing Year 2025-26	
Net Upland Sales	71,700
Net PIMA Sales	5,000
Total Net Sales	76,700
All Figures in US Running Bale	



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## WEEKLY REPORT      02-Aug-2025

Gujarat Spot Rate Weekly Changes						
Variety	Staple Length	Mic.	26-07-2025	02-08-2025	Change	Change (in Per.)
					W/W	W/W
Shankar 6	29mm	3.8	57,300	57,050	-250	-0.44%
V-797	13% Trash		39,250	39,100	-150	-0.38%
MCX Spot Rate			57,100	57,000	-100	-0.18%
USD-INR Exchange			86.52	87.54	1.02	1.17%

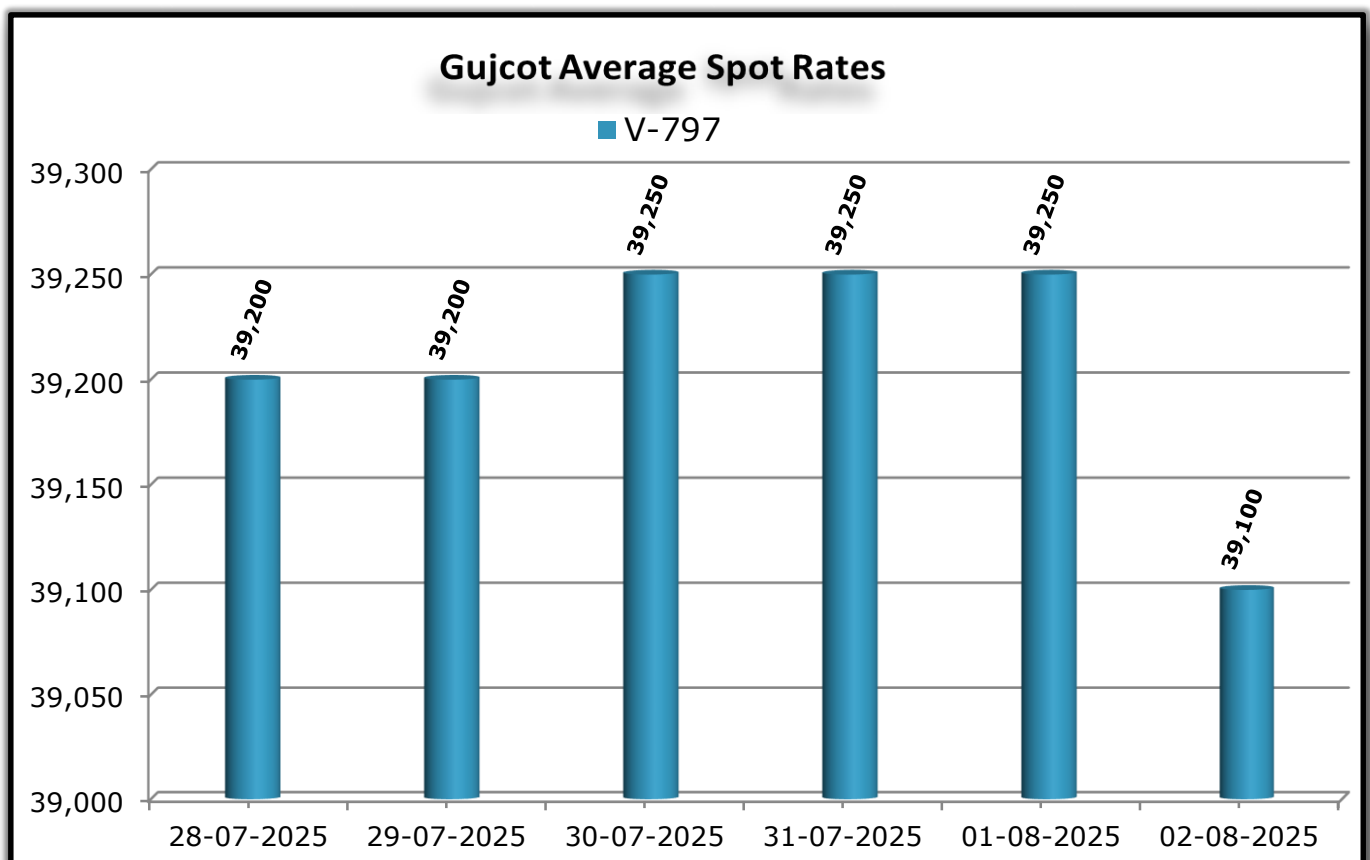
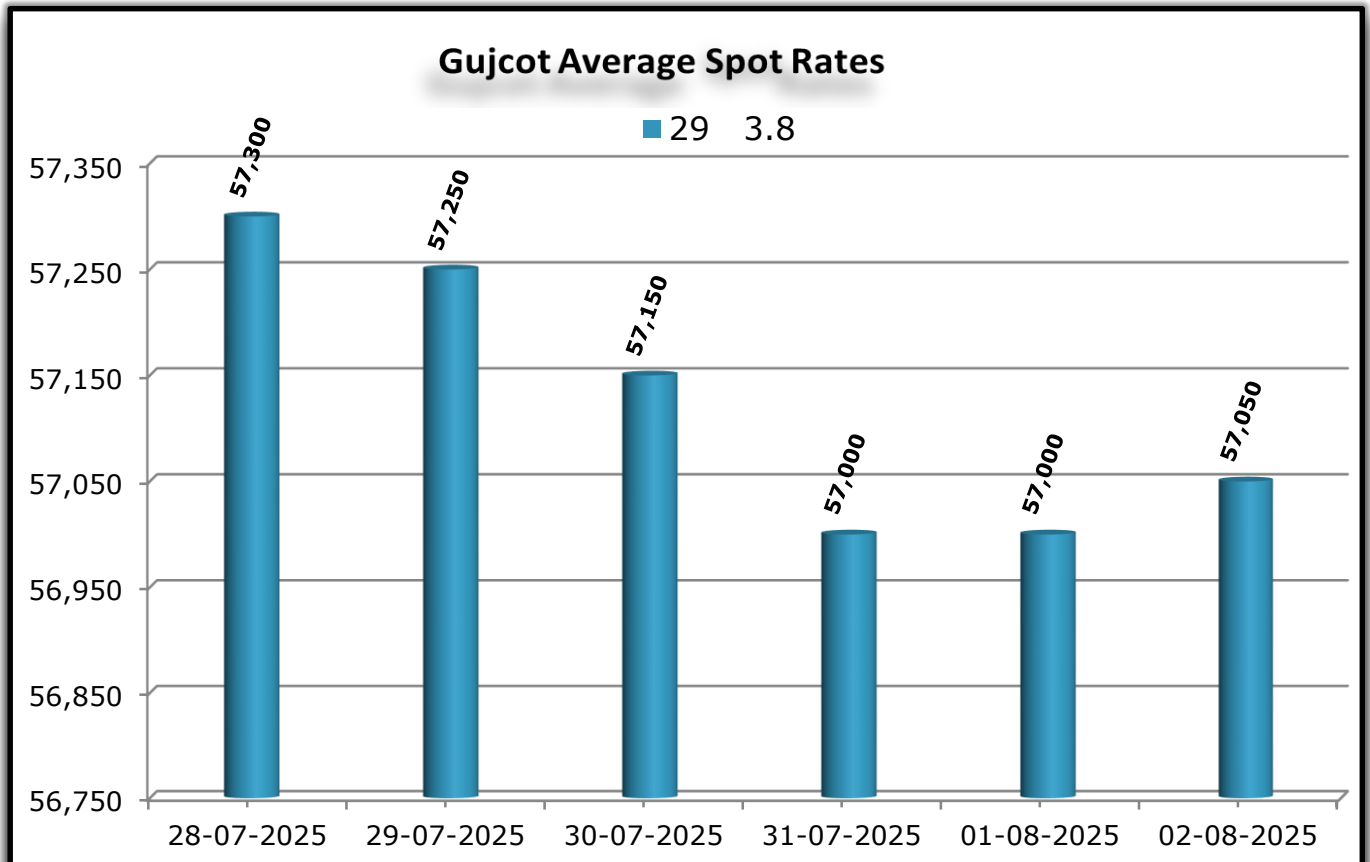
Average Rate of Last week					
Variety	Staple Length	Mic.	Price Range		Average Of 6 Days
			Low	High	
Shankar 6	29	3.8	57,000	57,300	57,125
Shankar 6	28.5	3.7	No Quote	No Quote	No Quote
Shankar 6	28	3.6	No Quote	No Quote	No Quote
Shankar 6	27	3.2	No Quote	No Quote	No Quote
Shankar 6	26	3.0	No Quote	No Quote	No Quote
V-797	13% Trash		39,100	39,250	39,208
MCX Spot Rate			56,980	57,240	57,057
USD Exchange Rate			86.67	87.59	87.26

Rate Of Last Week				
Date	29 3.8	V-797	MCX Spot Rate	USD-INR Exchange
28-07-2025	57,300	39,200	57,240	86.67
29-07-2025	57,250	39,200	57,080	86.81
30-07-2025	57,150	39,250	57,040	87.42
31-07-2025	57,000	39,250	56,980	87.59
01-08-2025	57,000	39,250	57,000	87.54
02-08-2025	57,050	39,100	57,000	87.54



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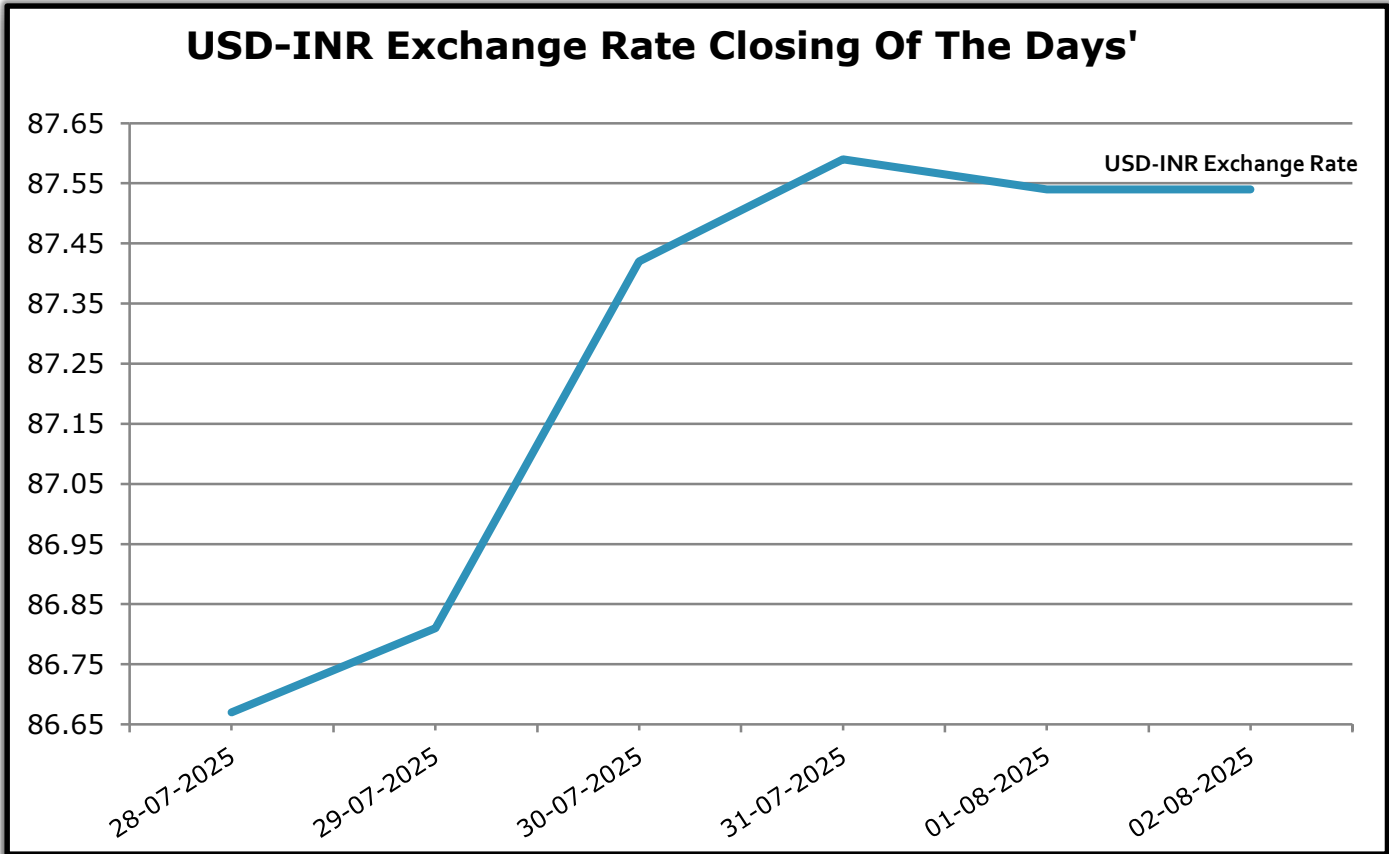
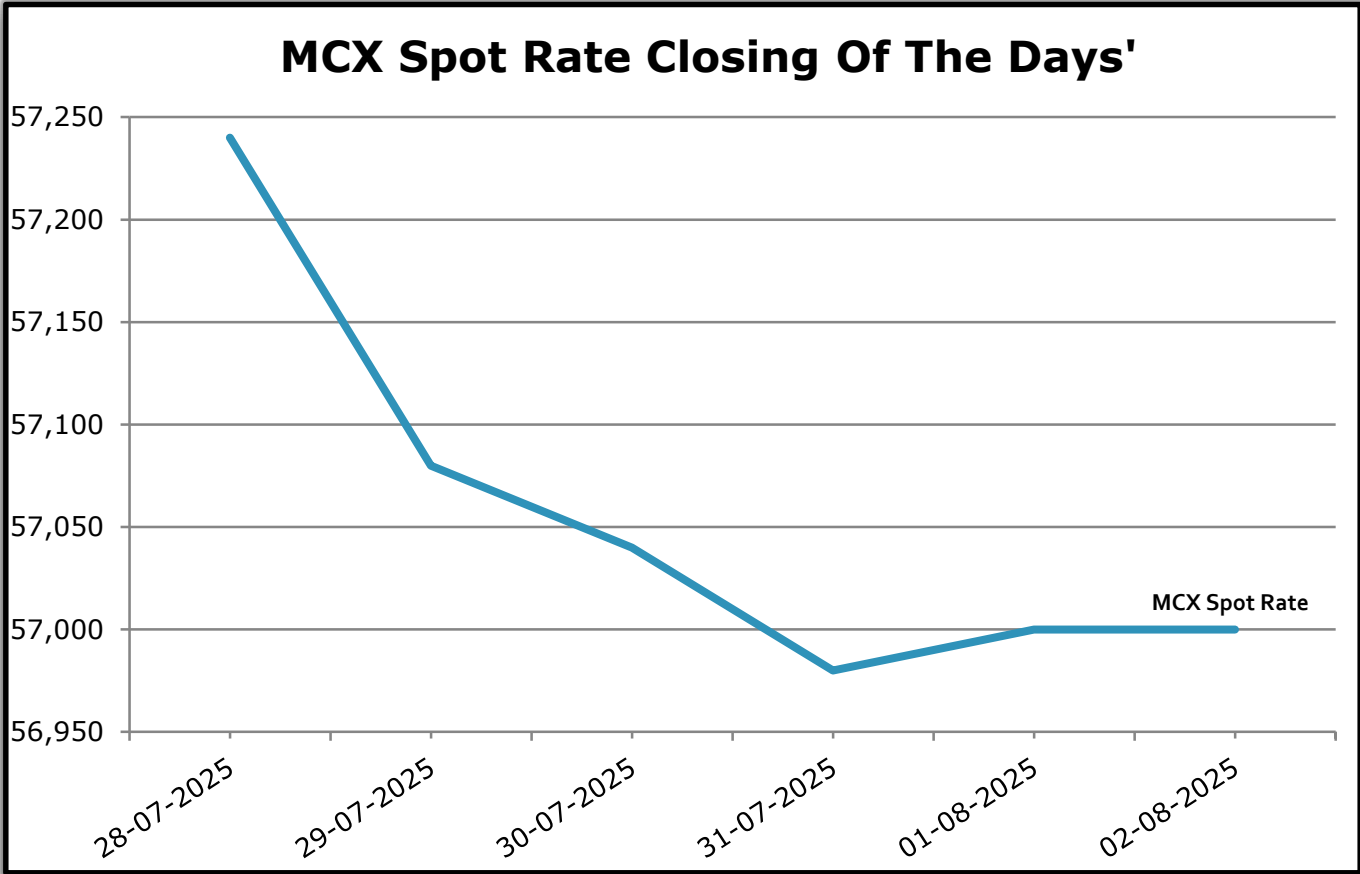






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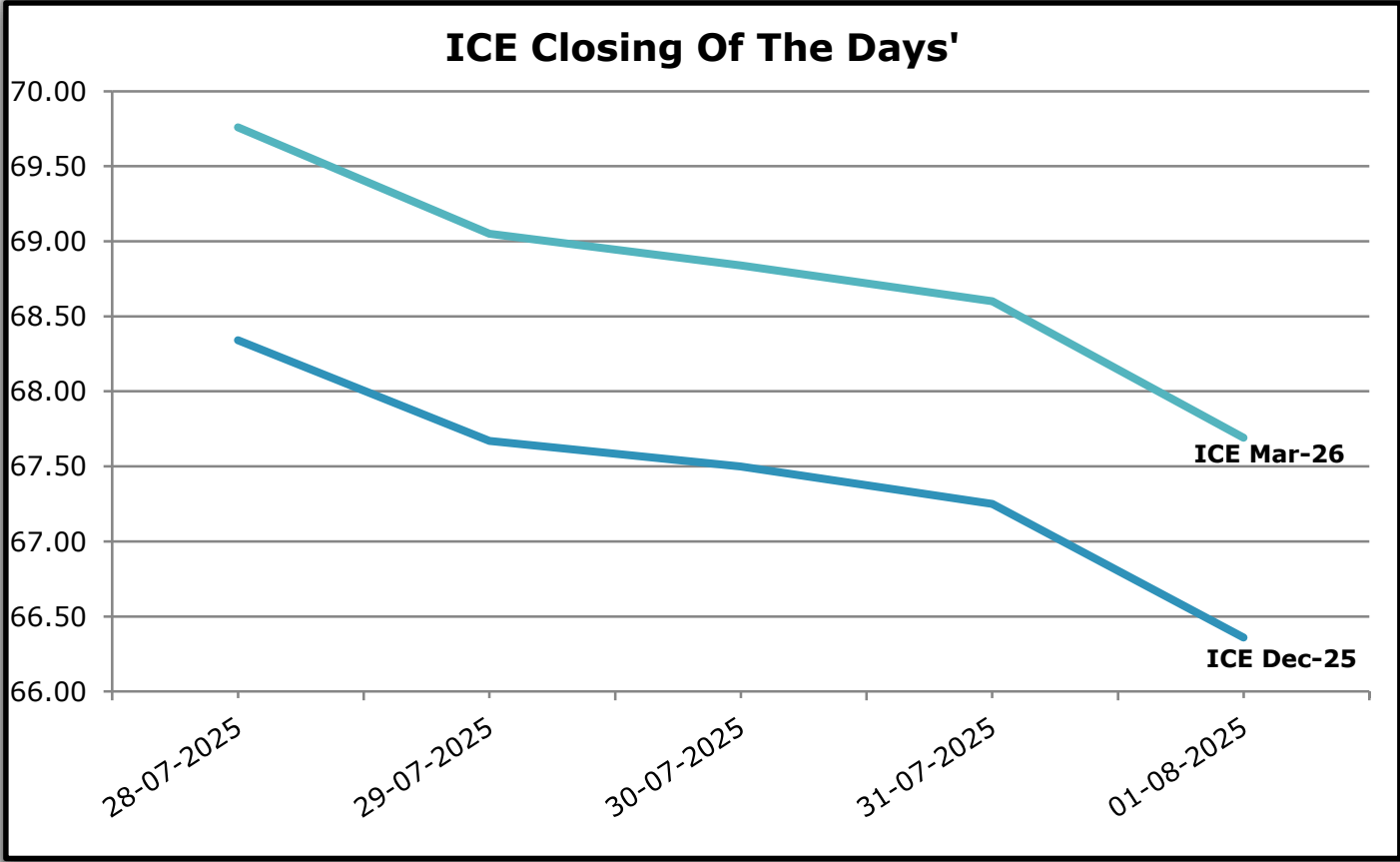
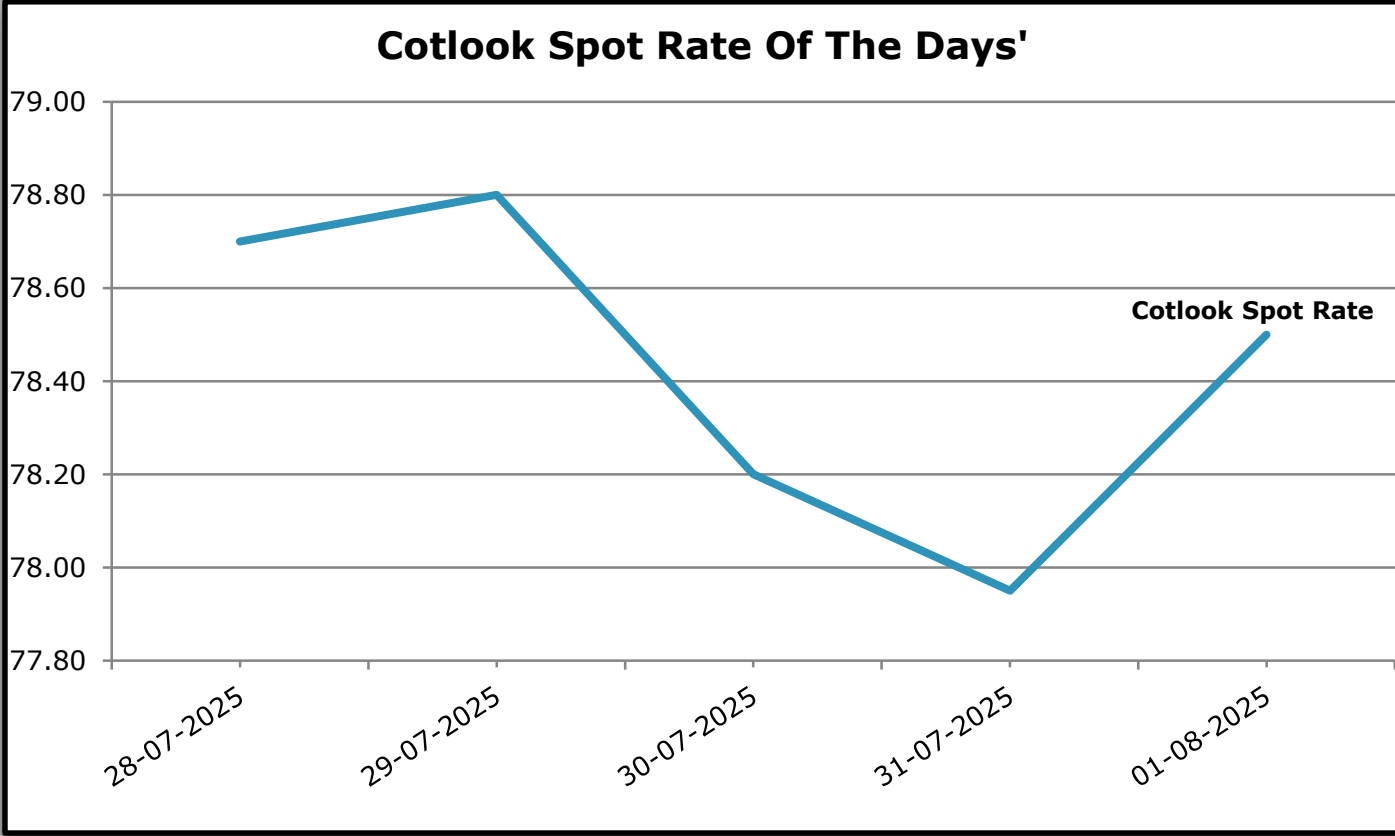


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Foreign Indices			
Date	Cotlook	ICE	
	Spot Rate	Dec-25	Mar-26
28-07-2025	78.70	68.34	69.76
29-07-2025	78.80	67.67	69.05
30-07-2025	78.20	67.50	68.84
31-07-2025	77.95	67.25	68.60
01-08-2025	78.50	66.36	67.69



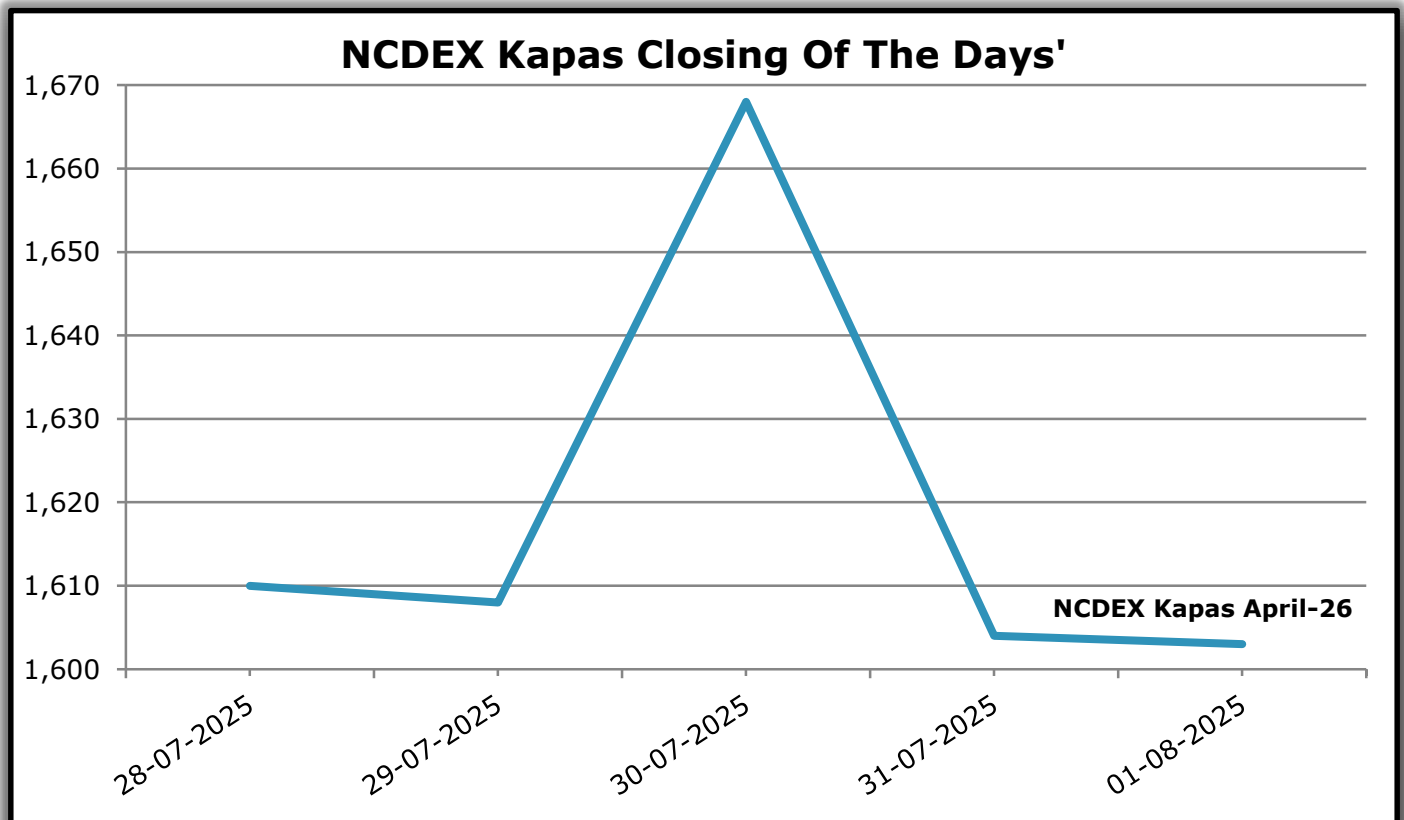


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Indian Indices	
Date	NCDEX Kapas
	April-26
28-07-2025	1,610.00
29-07-2025	1,608.00
30-07-2025	1,668.00
31-07-2025	1,604.00
01-08-2025	1,603.00

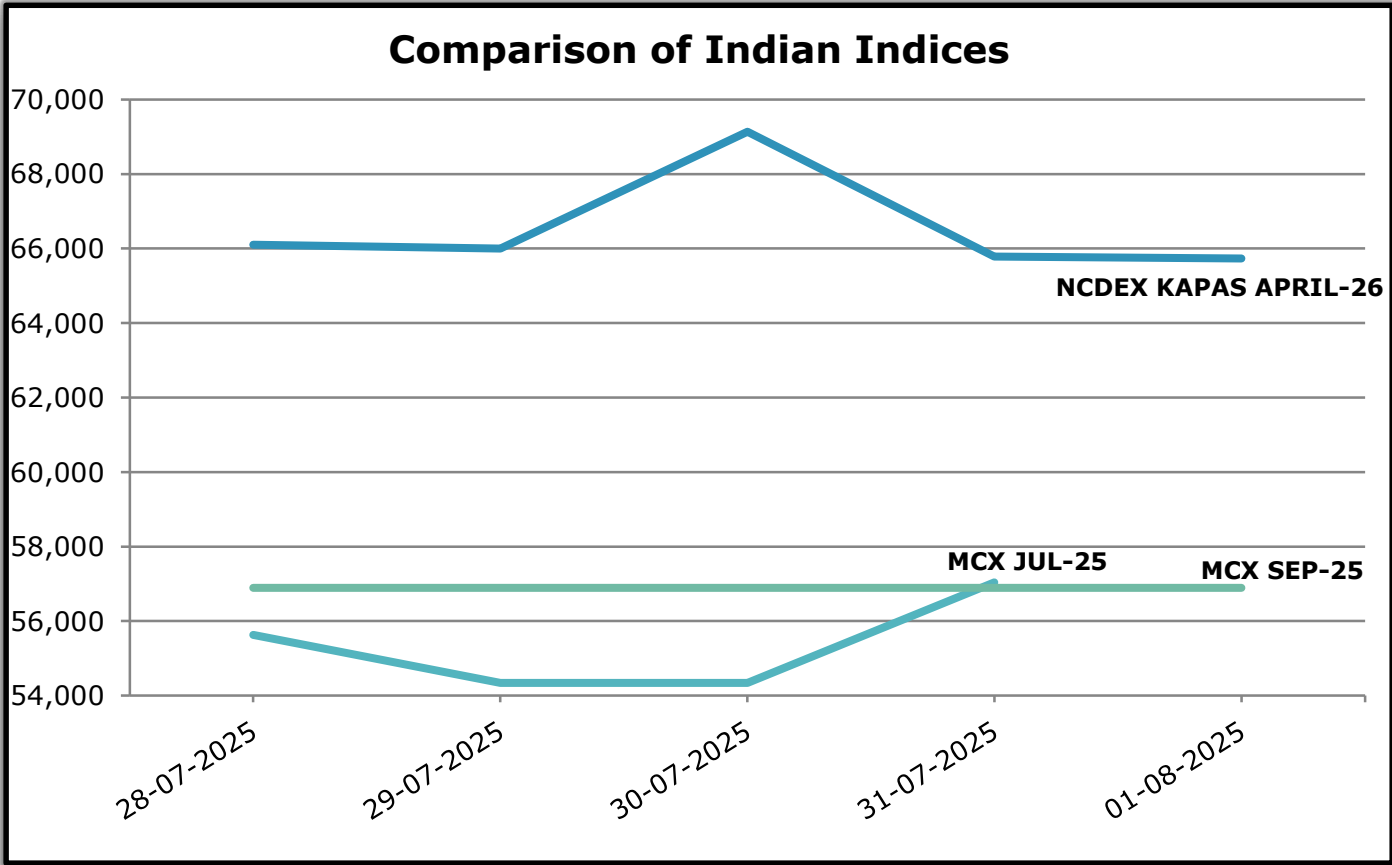




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Indian Indices in Candy Rate			
Date	NCDEX Kapas	MCX	
	April-26	Jul-25	Sep-25
28-07-2025	66,100	55,630	56,890
29-07-2025	65,995	54,340	56,890
30-07-2025	69,133	54,340	56,890
31-07-2025	65,786	57,040	56,890
01-08-2025	65,734		56,890
Remark :- For NCDEX Kapas we have taken seed rate 600/20 Kg to convert in Candy.			

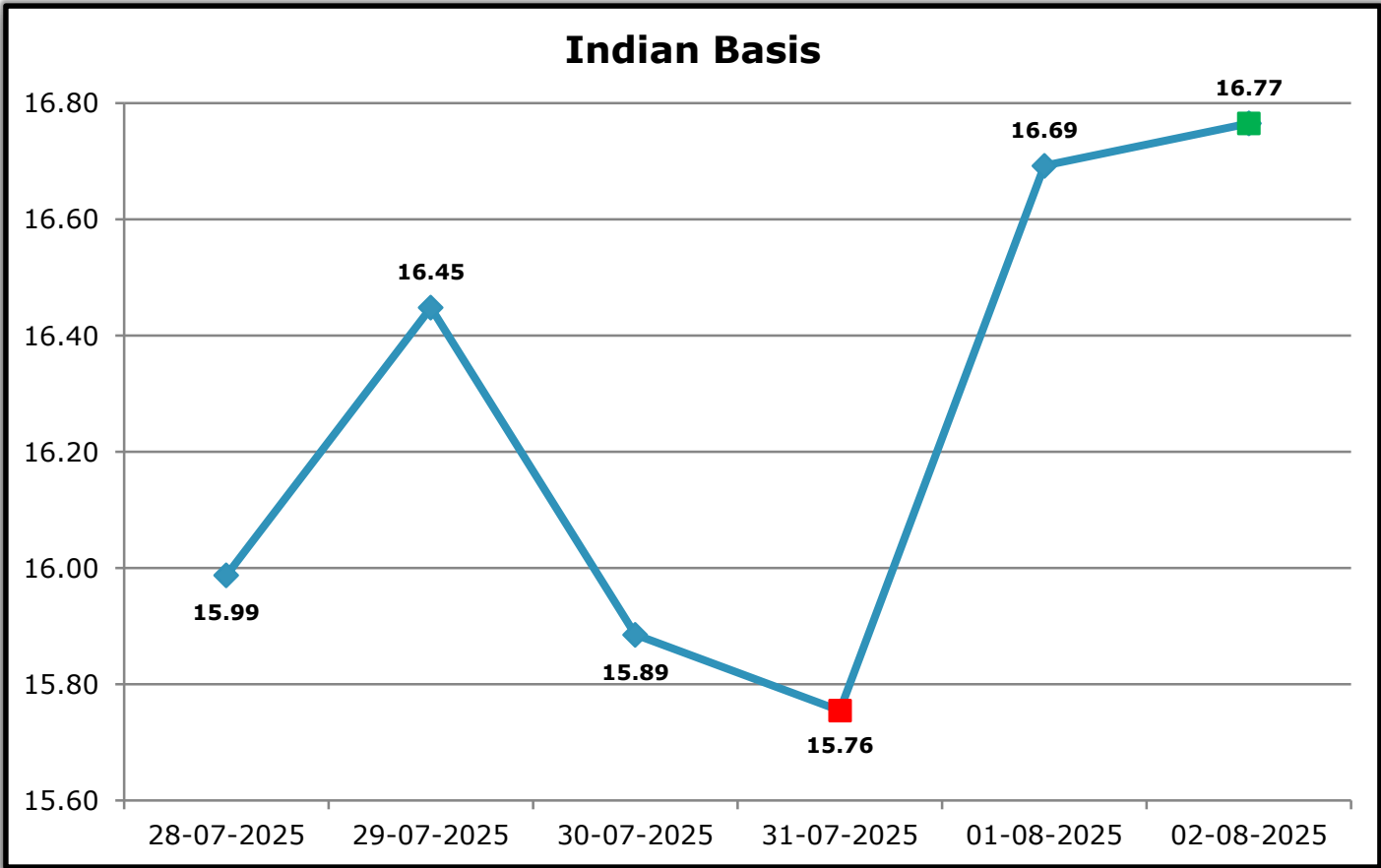




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Indian Basis					
DATE	29 MM	USD-INR	CENTS/LB	ICE Dec	BASIS
28-07-2025	57,300	86.67	84.33	68.34	15.99
29-07-2025	57,250	86.81	84.12	67.67	16.45
30-07-2025	57,150	87.42	83.39	67.50	15.89
31-07-2025	57,000	87.59	83.01	67.25	15.76
01-08-2025	57,000	87.54	83.05	66.36	16.69
02-08-2025	57,050	87.54	83.13	66.36	16.77







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## WEEKLY REPORT

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### IN THE WEEK AHEAD

- With July behind us and the new crop year underway, data releases are expected to slow next week. Aside from the usual cotton reports, attention will turn to headlines for clues on what might move markets.

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