



GUJCOT TRADE ASSOCIATION

WEEKLY REPORT 09-Aug-2025

Market Movement from 04th Aug 2025 to 09th Aug 2025.

- The NY futures market saw limited movement, remaining stuck in a narrow range, and closed the week with a gain of 24 points W/W.
- U.S. exports finished slightly higher at 1,65,000 bales, compared to the USDA target of 11.8 million bales.
- In the latest U. S. Export Sales Report for the week ending 31-Jul-2025, the final U.S. export sales report for the 2024-2025 season showed net upland sales cancellations of 17,172 bales, with shipments totaling 1,82,334 bales, while Pima sales were nil and shipments reached 8,966 bales, bringing total sales to -17,172 bales. For the new 2025-2026 marketing year, net upland sales were reported at 1,09,300 bales, with net Pima sales of 5,266 bales, resulting in combined total sales of 1,14,566 bales.
- The Gujcot Spot Rate remained steady at ₹56,850 on Monday and Tuesday before showing a gradual decline through the week — slipping to ₹56,800 on Wednesday, ₹56,750 on Thursday, and ₹56,700 on Friday, with Saturday's rate recorded at ₹56,600. The overall trend indicated mild bearish sentiment, driven by limited buying interest and stable supply conditions in the domestic market.



GUJCOT TRADE ASSOCIATION

WEEKLY REPORT 09-Aug-2025

- The Indian physical market remained steady to slightly lower, with a weaker sentiment prevailing. The primary concern for the textile value chain was the excess tariff imposed by the U.S. on India.
- The new season is approaching, and uncertainty in trade has caused a pause in buying activity. CCI managed to sell only 20,000 bales during the week.
- Indian mills are now adopting a wait-and-watch approach amid the new period of uncertainty.
- The monsoon is progressing well, and the cotton crop remains healthy.
- All-India cotton sowing has reached 104.153 lakh hectares, with Gujarat contributing 20.358 lakh hectares.
- During this week, the Indian basis remained between 15.48 and 16.11.
- This week, the USD-INR exchange rate remained relatively stable with minor fluctuations. It opened on Monday at 87.66, rose slightly to 87.80 on Tuesday, and eased to 87.73 on Wednesday. The rate inched down further to 87.70 on Thursday before returning to 87.66 on Friday, reflecting a largely steady trend with limited volatility throughout the week.
- **“Hope for the best.”**



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WEEKLY REPORT 09-Aug-2025

Gujarat District wise Cotton Sowing

Gujarat Districtwise Cotton Sowing Till 04-August-2025			
Kutch	750	Saurashtra	14,794
Kutch	750	Surendranagar	3,809
		Rajkot	1,293
North Gujarat	1,567	Jamnagar	873
Banarsakantha	187	Porbandar	41
Patan	320	Junagadh	302
Mehsana	276	Amreli	2,663
Sabarkantha	422	Bhavnagar	2,060
Gandhinagar	173	Morbi	2,077
Aravali	189	Botad	1,512
		Gir Somnath	114
Middle Gujarat	1,804	Devbhumi Dwarka	50
Ahmedabad	316		
Anand	3	South Gujarat	1,443
Kheda	163	Surat	11
Panchmahal	86	Narmada	473
Dahod	7	Bharuch	859
Vadodara	370	Dang	0
Mahisagar	83	Navsari	0
Chota Udaipur	775	Valsad	0
		Tapi	101
TOTAL			20,358
TOTAL (Last Year)			23,355
SUMMARY			
Zone	2025-26	2024-25	Change
Kutch	750	721	29
North Gujarat	1,567	1,906	-339
Middle Gujarat	1,804	2,724	-920
Saurashtra	14,794	16,473	-1,679
South Gujarat	1,443	1,531	-88
TOTAL	20,358	23,355	-2,997
All Figures in '00 Hectares			
Source :- Agriculture, Farmers Welfare and Co-operation Department Government of Gujarat			



GUJCOT TRADE ASSOCIATION

WEEKLY REPORT 09-Aug-2025

All India Cotton Sowing

All India Cotton Sowing				
As on 09-08-2025				
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	6.285	5.118	1.167	22.80%
North India	11.485	10.878	0.607	5.58%
Gujarat	20.358	23.355	-2.997	-12.83%
Maharashtra	38.172	40.778	-2.606	-6.39%
Madhya Pradesh	5.700	6.149	-0.449	-7.30%
Central India	64.230	70.282	-6.052	-8.61%
Telangana	17.689	16.857	0.832	4.94%
Andra Pradesh	3.250	3.240	0.010	0.31%
Karnataka	7.499	6.610	0.889	13.45%
Tamil Nadu	0.000	0.080	-0.080	-100.00%
South Zone	28.438	26.787	1.651	6.16%
Orissa	0.000	2.306	-2.306	-100.00%
Others	0.000	0.241	-0.241	-100.00%
All India	104.153	110.493	-6.340	-5.74%



GUJCOT TRADE ASSOCIATION

WEEKLY REPORT 09-Aug-2025

Global

US Weekly Export Sales

- Net sales of UPLAND totaling 109,300 RB for 2025/2026 marketing year, which began August 1, primarily for Vietnam (53,400 RB, including decreases of 3,200 RB), Peru (20,300 RB), Mexico (7,800 RB, including decreases of 300 RB), Pakistan (7,400 RB), and Bangladesh (7,100 RB), were offset by reductions for Honduras (1,500 RB), Nicaragua (900 RB), Thailand (300 RB), and China (100 RB).
- A total reduction of 17,200 RB in sales was carried over from the 2024/2025 marketing year, which ended July 31.
- UPLAND Exports for the period ending July 31 of 182,300 RB brought accumulated exports to 11,191,200 RB, up 1 percent from the prior year’s total of 11,070,400 RB. The destinations were primarily to Vietnam (39,600 RB), Pakistan (34,600 RB), Bangladesh (29,400 RB), Turkey (24,100 RB), and Mexico (11,900 RB).
- Net sales of PIMA totaling 5,300 RB for 2025/2026 were primarily for China (2,300 RB), India (1,300 RB), Egypt (900 RB), Turkey (300 RB), and Vietnam (300 RB).
- No PIMA sales were carried over from the 2024/2025 marketing year, which ended July 31.
- PIMA Exports for the period ending July 31 of 9,000 RB brought accumulated exports to 435,000 RB, up 35 percent from the prior year’s total of 321,800 RB. The destinations were primarily to India (3,000 RB), Vietnam (2,200 RB), China (1,300 RB), Egypt (1,100 RB), and Pakistan (900 RB).

US WEEKLY EXPORT SALES & SHIPMENTS			
As on 31-Jul-2025			
	UPLAND	PIMA	TOTAL
2024-2025			
New Sales	14,127		14,127
Cancellation	31,299		31,299
NET SALES	-17,172		-17,172
2025-2026			
New Sales	1,09,300	5,266	1,14,566
2024-2025			
EXPORTS	1,82,334	8,966	1,91,300



GUJCOT TRADE ASSOCIATION

WEEKLY REPORT 09-Aug-2025

Gujarat Spot Rate Weekly Changes						
Variety	Staple Length	Mic.	02-08-2025	09-08-2025	Change	Change (in Per.)
					W/W	W/W
Shankar 6	29mm	3.8	57,050	56,600	-450	-0.80%
V-797	13% Trash		39,100	39,150	50	0.13%
MCX Spot Rate			57,000	56,780	-220	-0.39%
USD-INR Exchange			87.54	87.66	0.12	0.14%

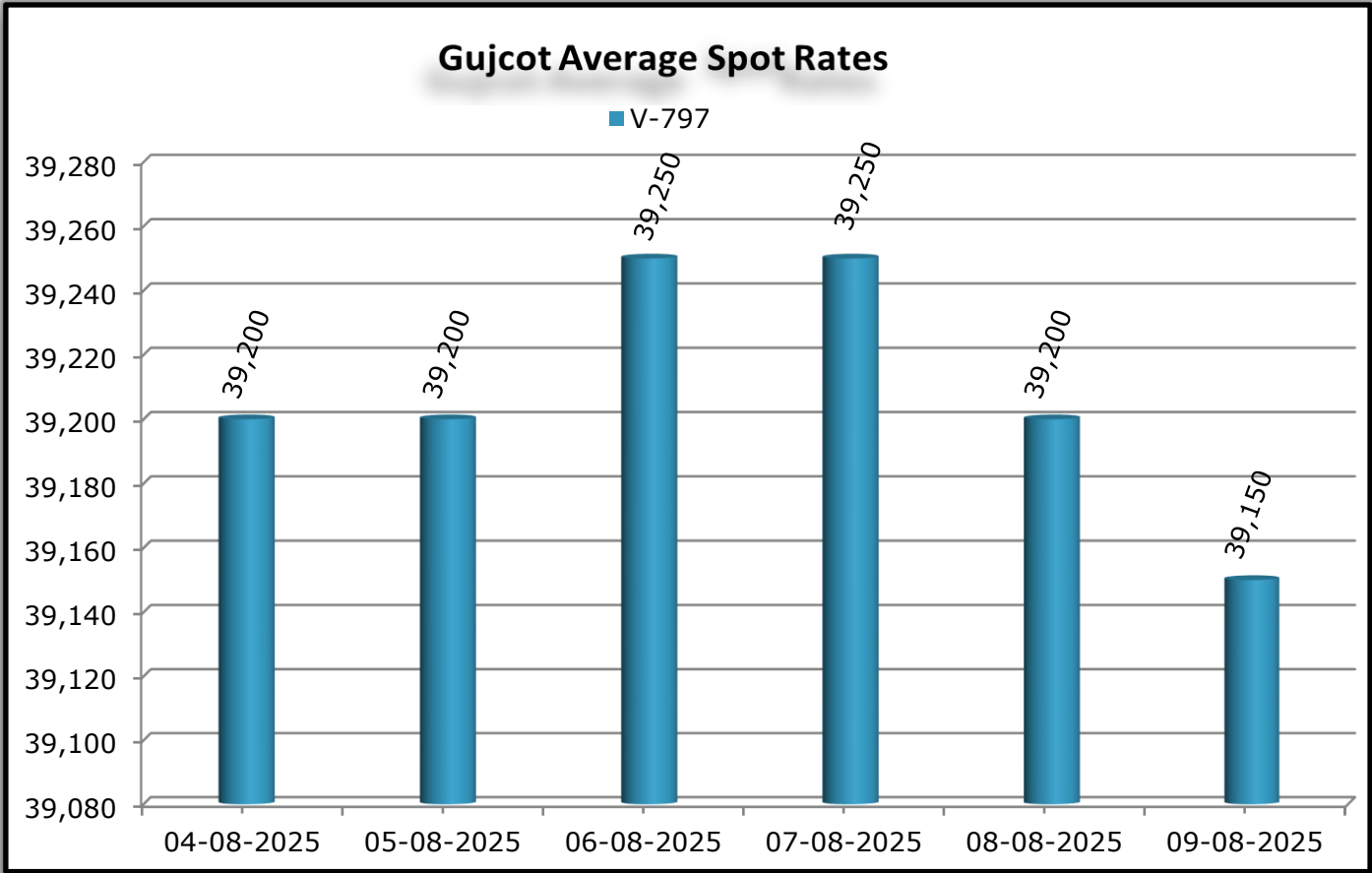
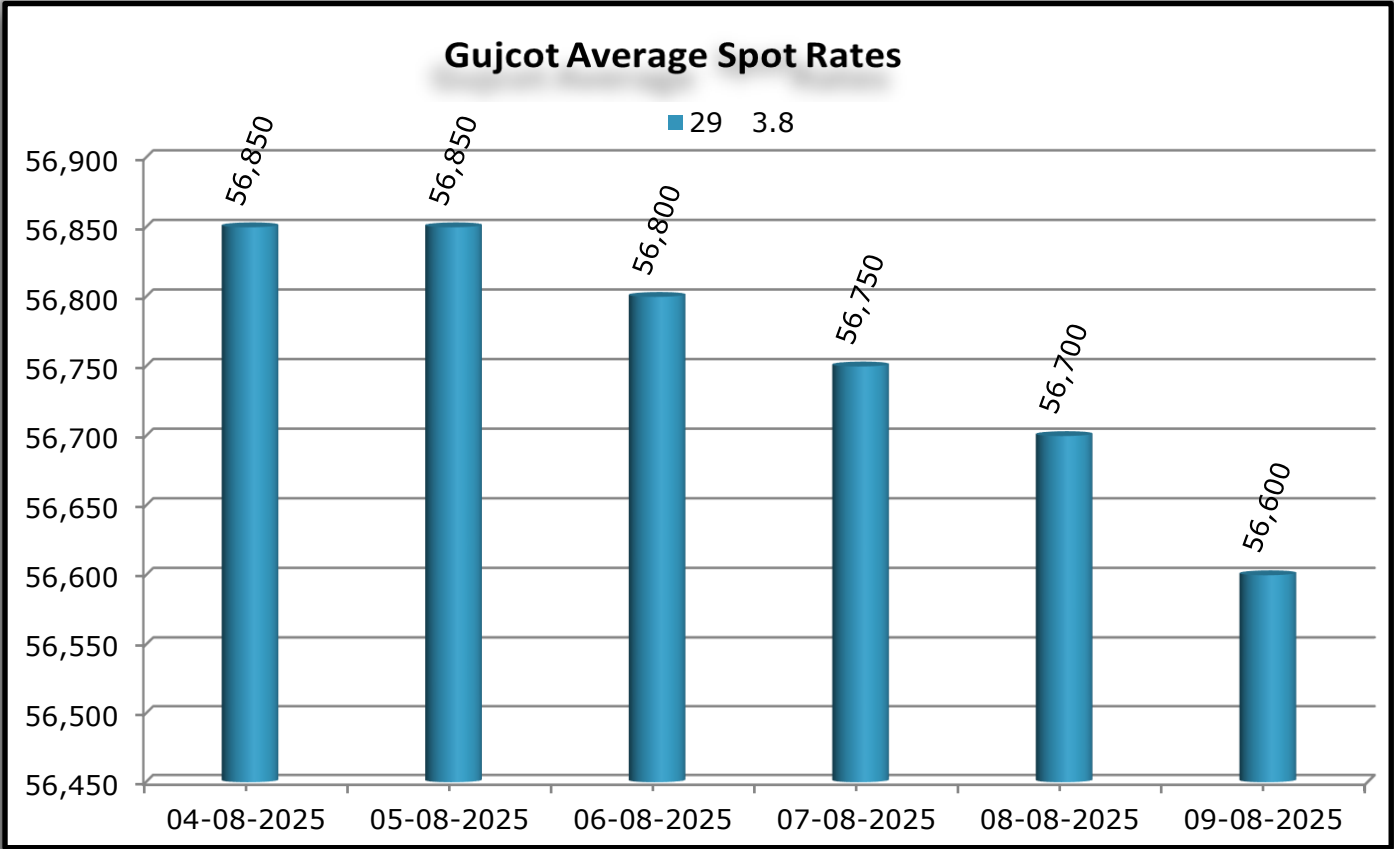
Average Rate of Last week					
Variety	Staple Length	Mic.	Price Range		Average Of 6 Days
			Low	High	
Shankar 6	29	3.8	56,600	56,850	56,758
Shankar 6	28.5	3.7	No Quote	No Quote	No Quote
Shankar 6	28	3.6	No Quote	No Quote	No Quote
Shankar 6	27	3.2	No Quote	No Quote	No Quote
Shankar 6	26	3.0	No Quote	No Quote	No Quote
V-797	13% Trash		39,150	39,250	39,208
MCX Spot Rate			56,780	57,000	56,893
USD Exchange Rate			87.66	87.80	87.70

Rate Of Last Week				
Date	29 3.8	V-797	MCX Spot Rate	USD-INR Exchange
04-08-2025	56,850	39,200	56,920	87.66
05-08-2025	56,850	39,200	57,000	87.80
06-08-2025	56,800	39,250	56,980	87.73
07-08-2025	56,750	39,250	56,900	87.70
08-08-2025	56,700	39,200	56,780	87.66
09-08-2025	56,600	39,150	56,780	87.66



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WEEKLY REPORT 09-Aug-2025

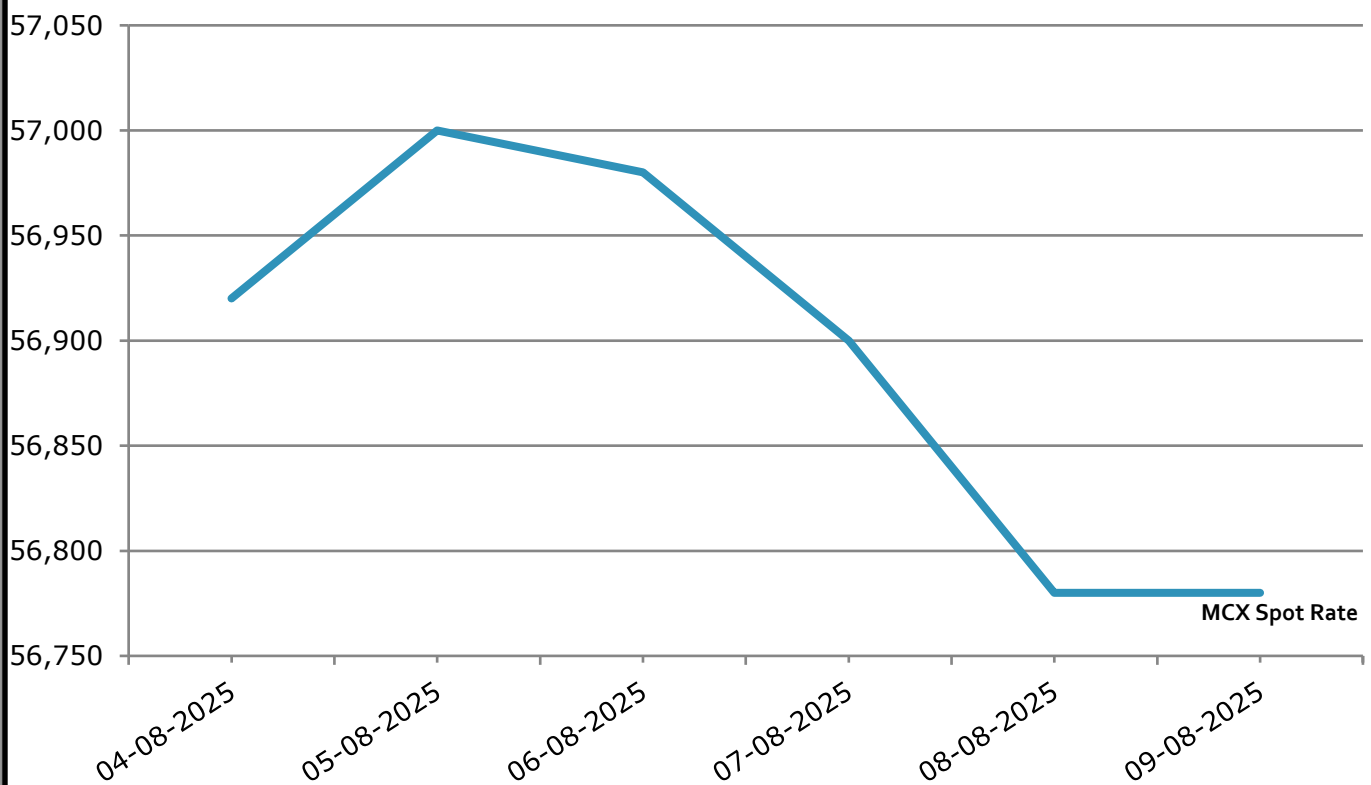




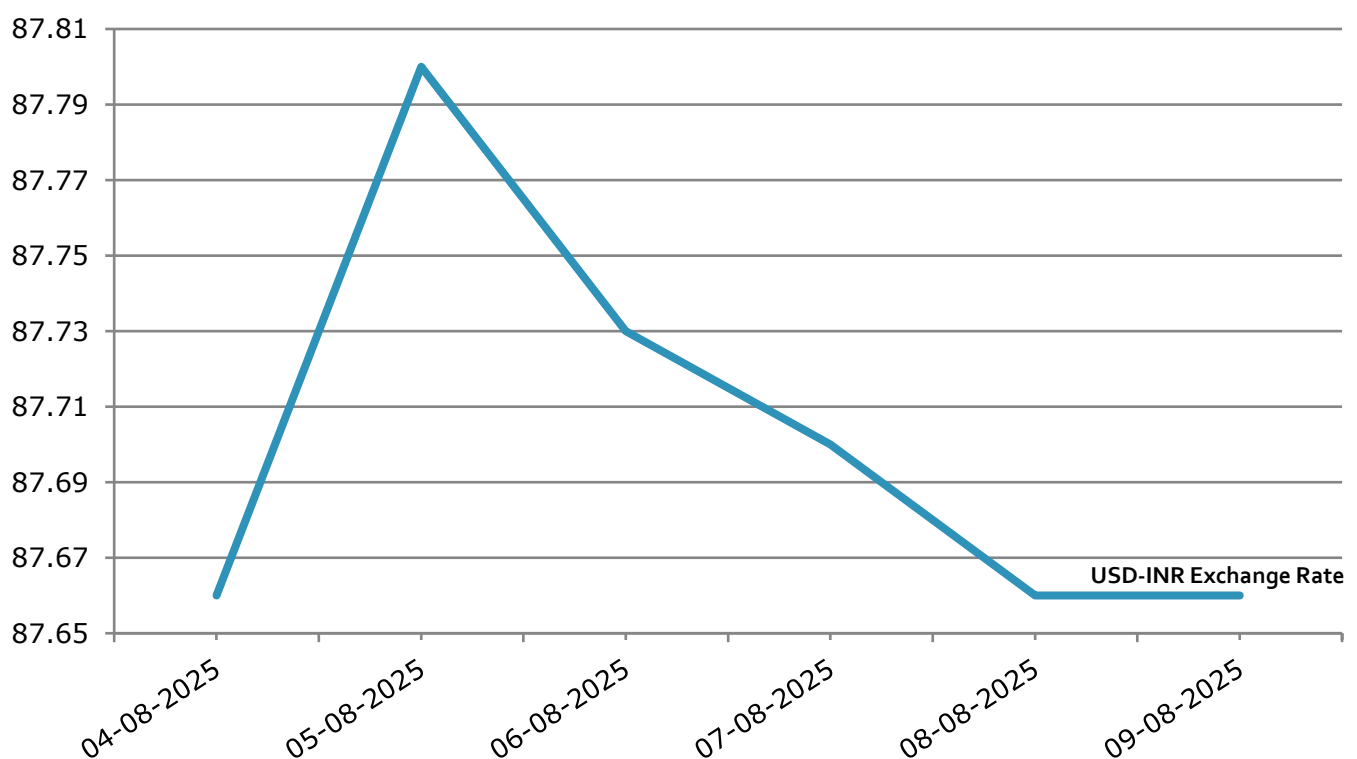
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WEEKLY REPORT 09-Aug-2025

MCX Spot Rate Closing Of The Days'



USD-INR Exchange Rate Closing Of The Days'



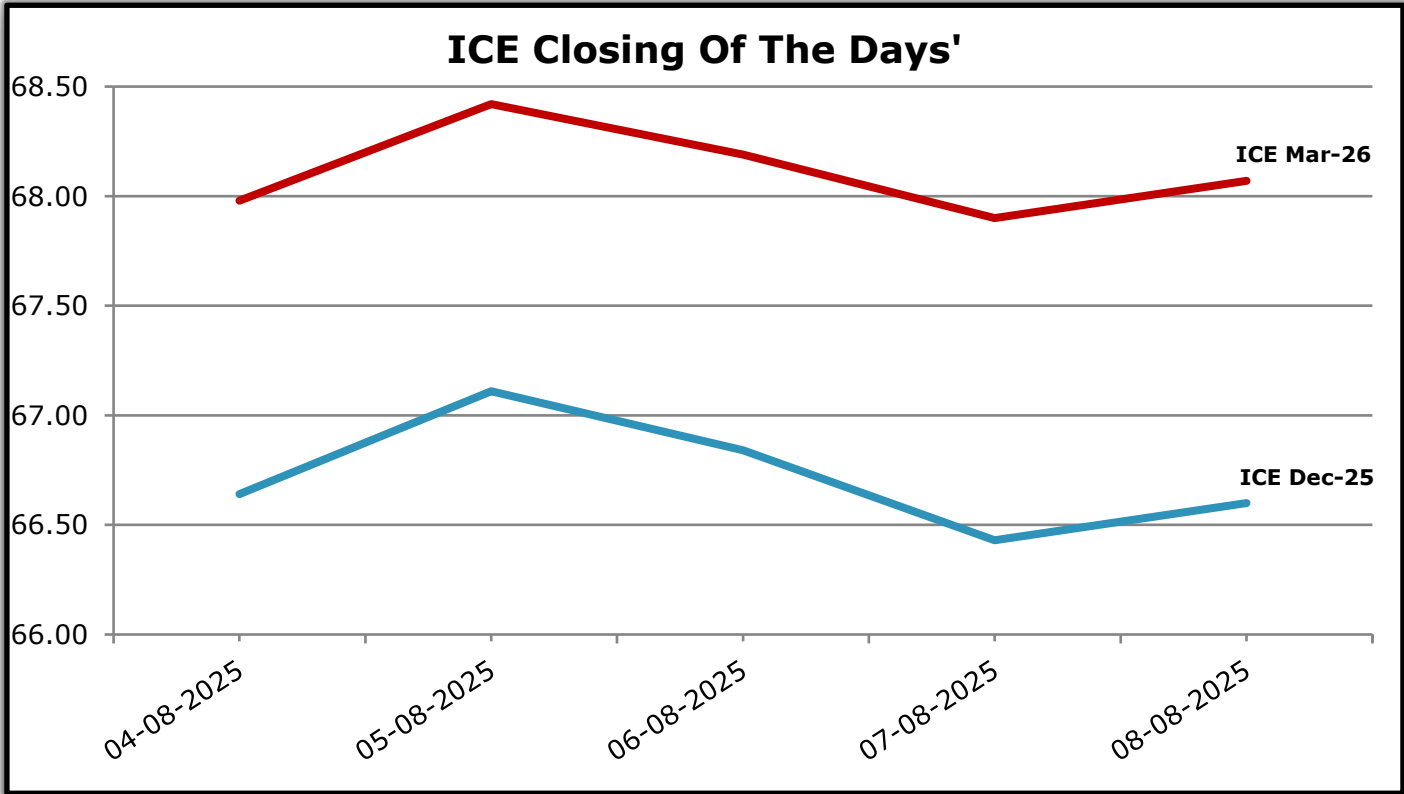
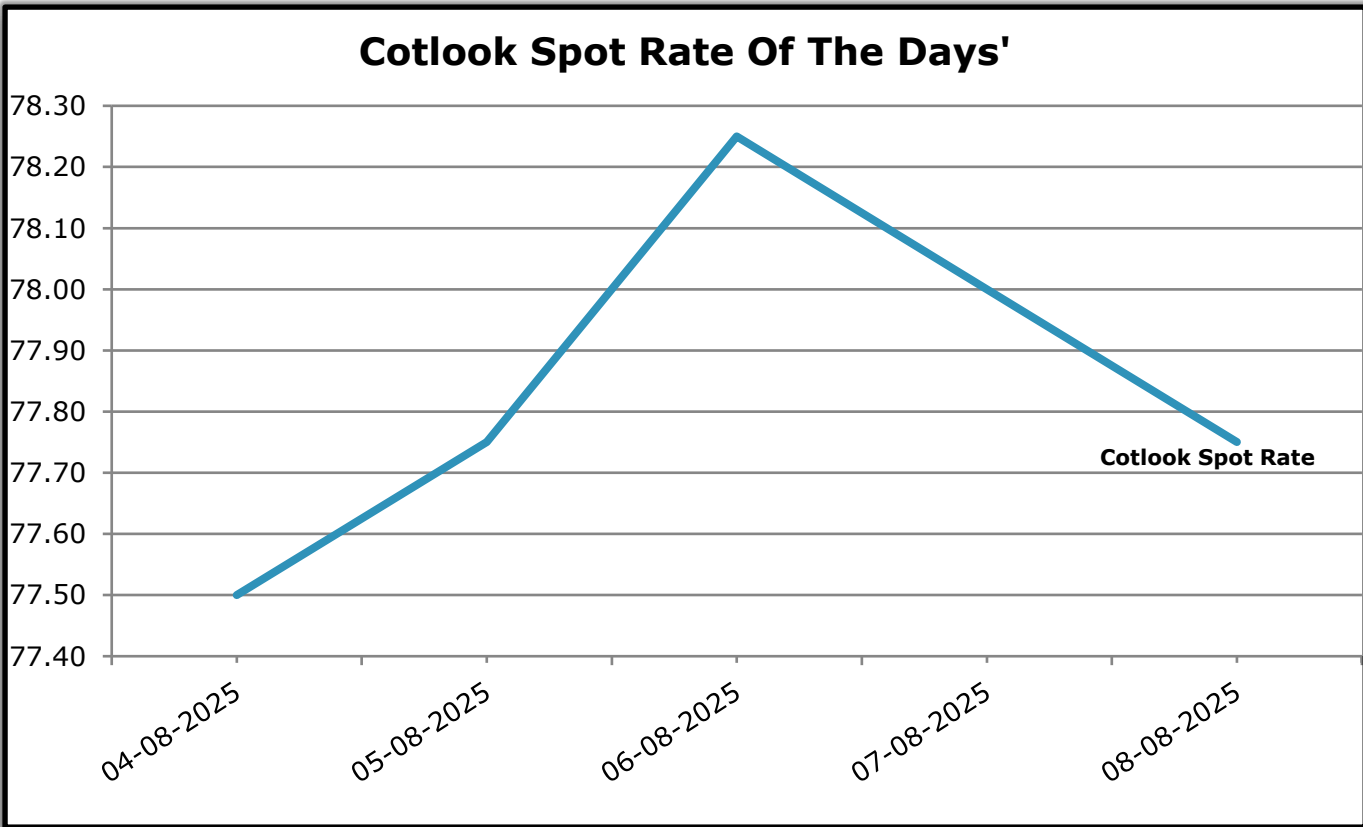


GUJCOT TRADE ASSOCIATION

WEEKLY REPORT

09-Aug-2025

Foreign Indices			
Date	Cotlook	ICE	
	Spot Rate	Dec-25	Mar-26
04-08-2025	77.50	66.64	67.98
05-08-2025	77.75	67.11	68.42
06-08-2025	78.25	66.84	68.19
07-08-2025	78.00	66.43	67.90
08-08-2025	77.75	66.60	68.07



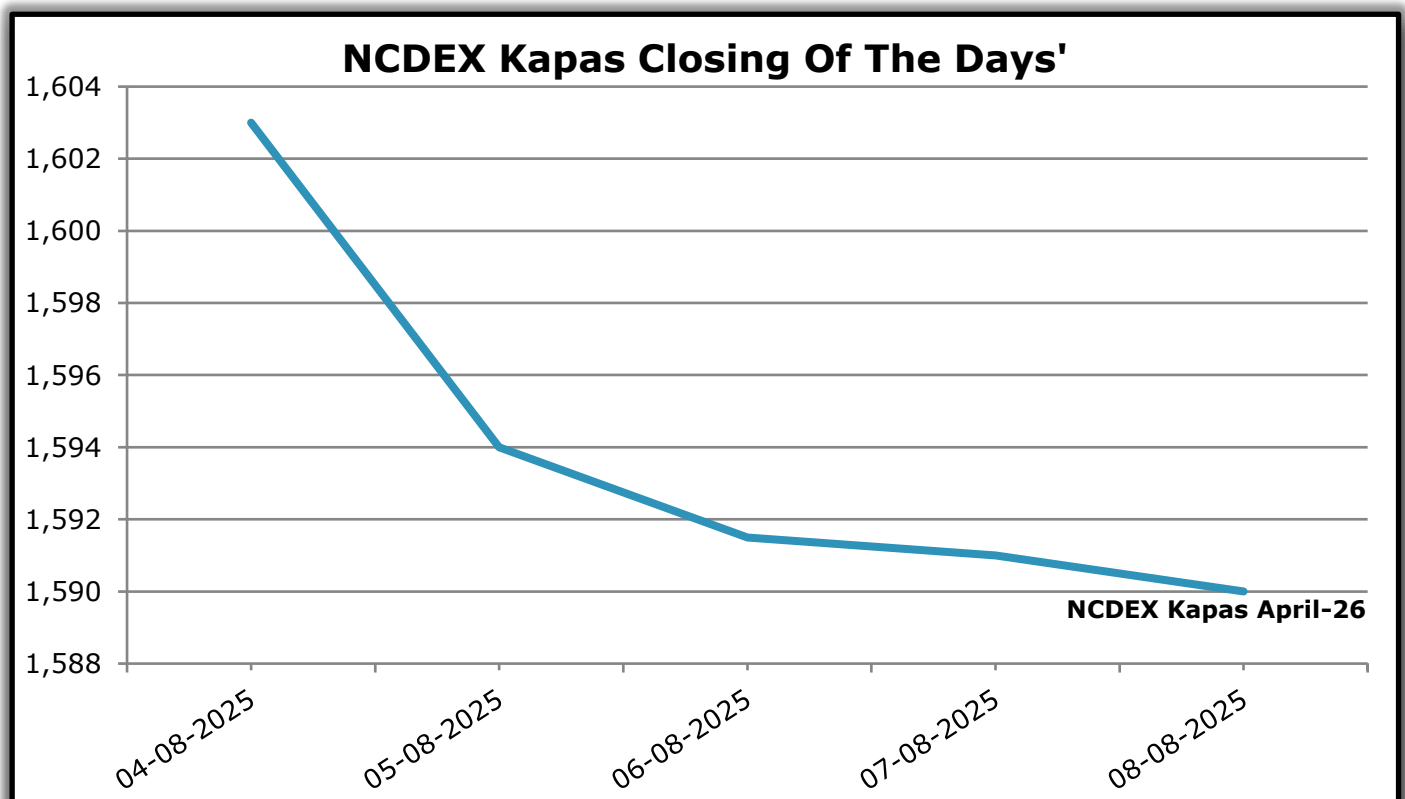


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WEEKLY REPORT

09-Aug-2025

Indian Indices	
Date	NCDEX Kapas
	April-26
04-08-2025	1,603.00
05-08-2025	1,594.00
06-08-2025	1,591.50
07-08-2025	1,591.00
08-08-2025	1,590.00

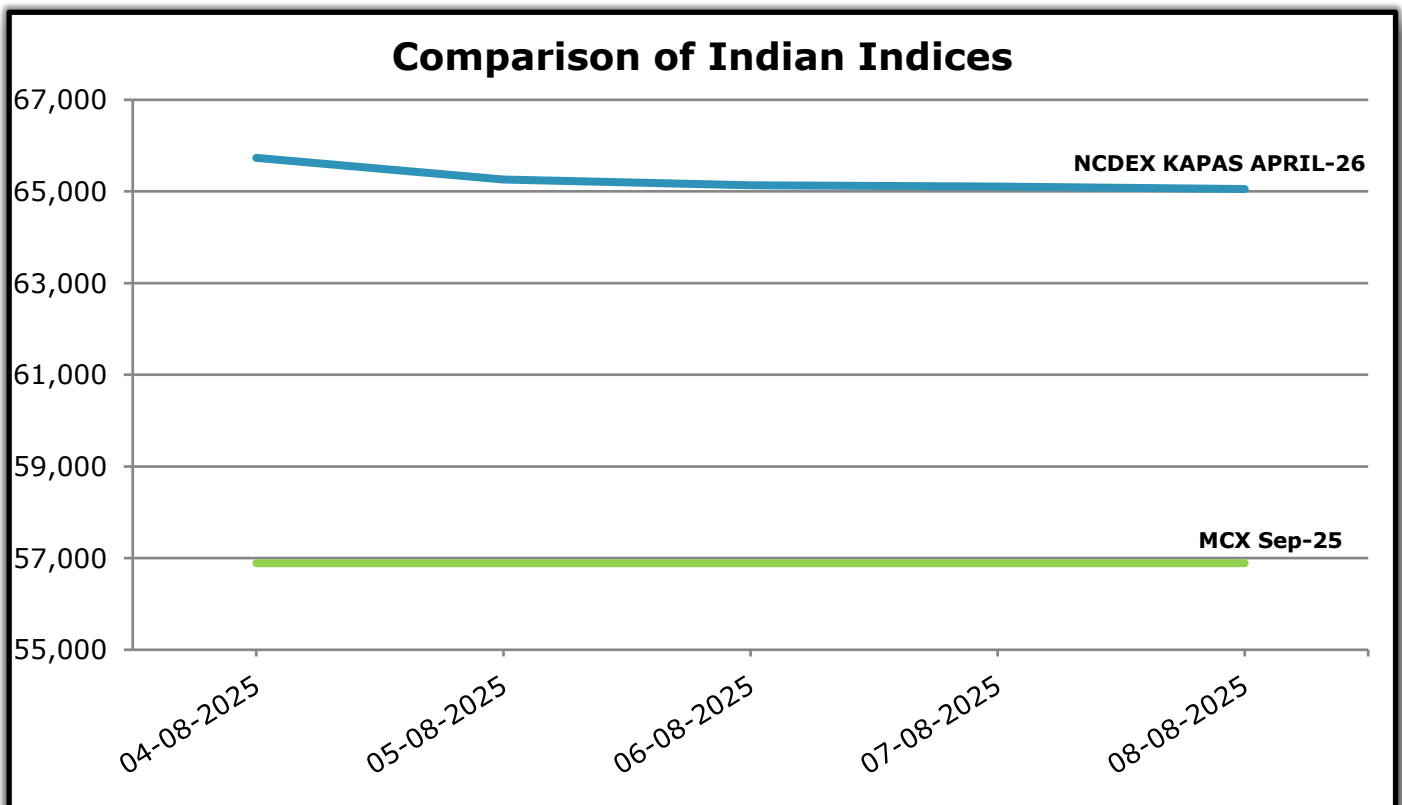




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WEEKLY REPORT 09-Aug-2025

Indian Indices in Candy Rate		
Date	NCDEX Kapas	MCX
	April-26	Sep-25
04-08-2025	65,734	56,890
05-08-2025	65,263	56,890
06-08-2025	65,132	56,890
07-08-2025	65,106	56,890
08-08-2025	65,054	56,890
Remark :- For NCDEX Kapas we have taken seed rate 600/20 Kg to convert in Candy.		

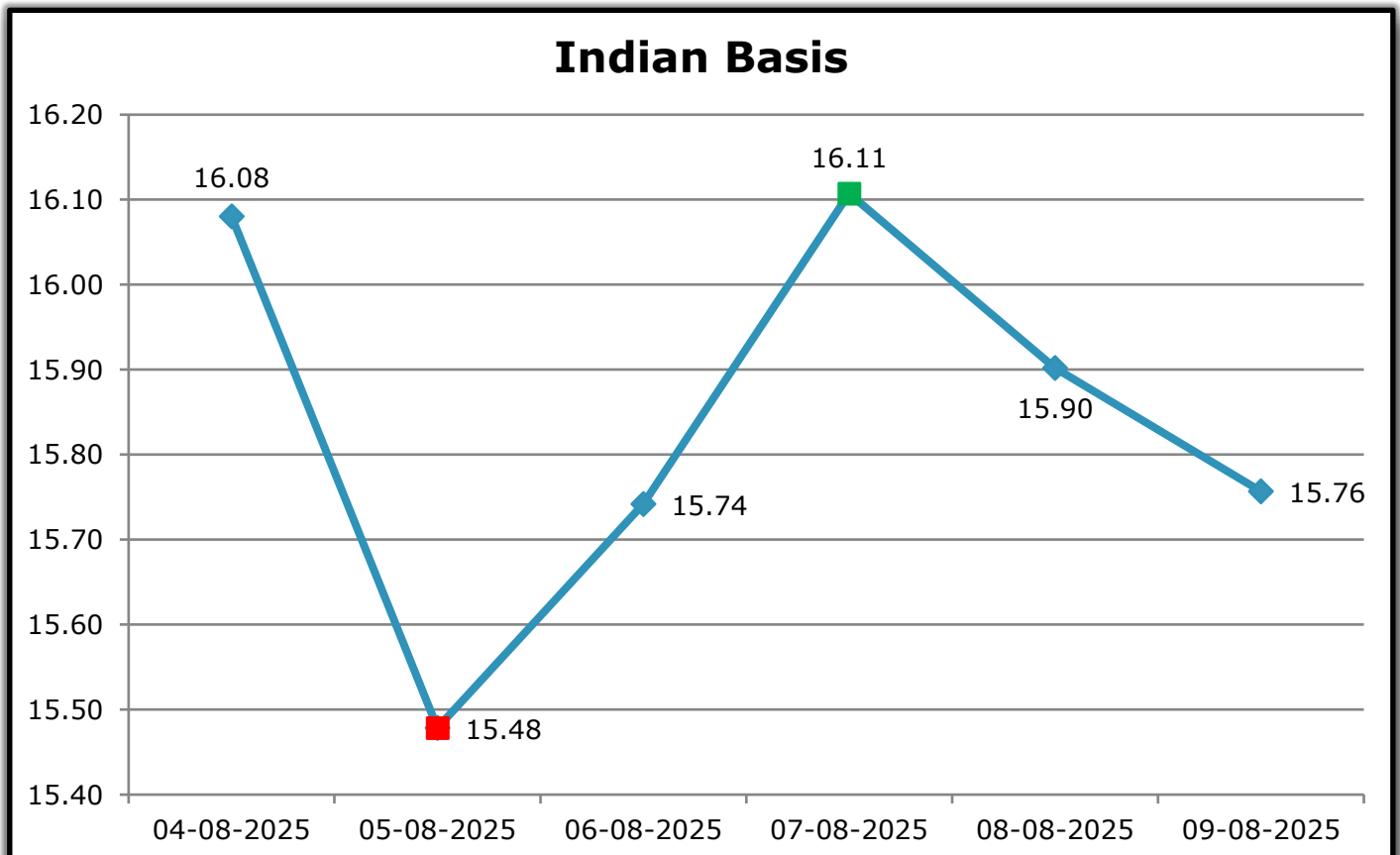




GUJCOT TRADE ASSOCIATION

WEEKLY REPORT 09-Aug-2025

Indian Basis					
DATE	29 MM	USD-INR	CENTS/LB	ICE DEC	BASIS
04-08-2025	56,850	87.66	82.72	66.64	16.08
05-08-2025	56,850	87.80	82.59	67.11	15.48
06-08-2025	56,800	87.73	82.58	66.84	15.74
07-08-2025	56,750	87.70	82.54	66.43	16.11
08-08-2025	56,700	87.66	82.50	66.60	15.90
09-08-2025	56,600	87.66	82.36	66.60	15.76





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09-Aug-2025

IN THE WEEK AHEAD

- The week kicks off on **Tuesday, August 12**, with the release of the **USDA World Supply/Demand Report** at 12:00 PM EST, providing the latest updates on global production, consumption, and ending stocks.
- On **Thursday, August 14**, the **USDA U.S. Weekly Export Report** for the week ended August 7 will be released at 8:30 AM EST, offering fresh insights into demand trends. Later that day, at 3:30 PM EST, the **CFTC Cotton On-Call Report** for the week ended August 8 will be published.
- The week wraps up on **Friday, August 15**, with the **CFTC Commitment of Traders Report** for the week ended August 12, released at 3:30 PM EST, alongside the **last trading day and expiration of September 2025 options**.

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