



GUJCOT TRADE ASSOCIATION

WEEKLY REPORT 16-Aug-2025

Market Movement from 11th Aug 2025 to 16th Aug 2025.

- With support from a bullish WASDE report, NY futures pulled up on the day; however, limited demand and profit booking erased nearly half of the gains later. Overall, the market still struggled to break out of the tight 67–69 cents range. NY December ultimately closed with a week-on-week gain of 94 points.
- The USDA August 2025 WASDE report projects a tighter U.S. cotton balance sheet for 2025/26 with lower production at 13.2 million bales, reduced exports, and ending stocks down to 3.6 million bales (stocks-to-use ratio 26.3%), while higher abandonment in the Southwest is partly offset by stronger yields; the season-average upland price is raised to 64 cents per pound. Globally, both production and consumption are trimmed, with declines in the U.S., Sudan, Uzbekistan, and Mali outweighing a larger crop in China, while lower mill use in India, Bangladesh, and Turkey offsets gains in China. World trade is projected lower, led by reduced U.S. and African exports, and with smaller beginning stocks and production, world ending stocks are cut by 3.4 million bales.



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- In the latest U. S. Export Sales Report for the week ending 07-Aug-2025, U.S. export sales for the 2025-2026 season totaled 2,44,100 bales, comprising net upland sales of 2,42,000 bales and net Pima sales of 2,100 bales, while shipments reached 1,42,600 bales for upland and 12,000 bales for Pima. For the 2026-2027 season, net sales were minimal at 1,100 bales, all of which were upland, with no Pima sales recorded.
- The Gujcot Spot Rate remained steady at ₹56,600 on Monday and Tuesday, inched up to ₹56,850 on Wednesday, further increased to ₹56,950 on Thursday and Friday, and maintained the same level on Saturday at ₹56,950, indicating a gradual upward trend midweek before stabilizing towards the weekend.
- The Indian physical market also remained stuck in a narrow range, with tariff concerns and weak demand slowing down mill purchases. CCI too witnessed limited buying activity during the week.
- Imported cotton is being offered at prices much lower than domestic levels, leading mills with advance license facilities to actively book imports.



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- Overall, NY futures, the Indian physical market, the Indian basis, and the Cotlook Index are all stuck in a tight, narrow range.
- The monsoon is well in progress. While some areas now require additional rainfall, the overall crop condition remains good.
- All-India sowing has reached 106.960 lakh hectares, with Gujarat contributing 20.586 lakh hectares. Overall, sowing across the country is lagging compared to last year, and Gujarat is expected to record the lowest sowing of the decade.
- During this week, the Indian basis remained between 13.92 and 15.60.
- This week, the USD-INR exchange rate opened at 87.66 on Monday, inched up to 87.71 on Tuesday, eased to 87.44 on Wednesday, rebounded slightly to 87.55 on Thursday, and remained steady at 87.55 on Friday, reflecting minor fluctuations within a narrow trading range.
- **“Hope for the best.”**



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Gujarat District wise Cotton Sowing

Gujarat Districtwise Cotton Sowing Till 11-August-2025			
Kutch	750	Saurashtra	14,839
Kutch	750	Surendranagar	3,817
		Rajkot	1,293
North Gujarat	1,588	Jamnagar	874
Banarsakantha	190	Porbandar	41
Patan	336	Junagadh	302
Mehsana	278	Amreli	2,663
Sabarkantha	422	Bhavnagar	2,089
Gandhinagar	173	Morbi	2,078
Aravali	189	Botad	1,519
		Gir Somnath	114
Middle Gujarat	1,947	Devbhumi Dwarka	50
Ahmedabad	389		
Anand	4	South Gujarat	1,462
Kheda	167	Surat	12
Panchmahal	86	Narmada	482
Dahod	7	Bharuch	860
Vadodara	427	Dang	0
Mahisagar	84	Navsari	0
Chota Udaipur	783	Valsad	0
		Tapi	108
TOTAL			20,586
TOTAL (Last Year)			23,473
SUMMARY			
Zone	2025-26	2024-25	Change
Kutch	750	726	24
North Gujarat	1,588	1,920	-332
Middle Gujarat	1,947	2,743	-796
Saurashtra	14,839	16,554	-1,715
South Gujarat	1,462	1,531	-69
TOTAL	20,586	23,473	-2,887
All Figures in '00 Hectares			
Source :- Agriculture, Farmers Welfare and Co-operation Department Government of Gujarat			



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All India Cotton Sowing

All India Cotton Sowing				
As on 16-08-2025				
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	6.286	5.132	1.154	22.49%
North India	11.486	10.892	0.594	5.45%
Gujarat	20.586	23.473	-2.887	-12.30%
Maharashtra	38.394	40.832	-2.438	-5.97%
Madhya Pradesh	5.700	6.149	-0.449	-7.30%
Central India	64.680	70.454	-5.774	-8.20%
Telangana	18.064	16.988	1.076	6.33%
Andra Pradesh	3.520	3.420	0.100	2.92%
Karnataka	7.499	6.640	0.859	12.94%
South Zone	29.083	27.048	2.035	7.52%
Tamil Nadu	1.711	2.677	-0.966	-36.09%
Orissa				
Others				
All India	106.960	111.071	-4.111	-3.70%



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USDA-WASDE

The 2025/26 U.S. cotton balance sheet for August reflects lower production, exports, and beginning and ending stocks, along with unchanged consumption and imports compared to last month. Planted area is lowered 8 percent to 9.3 million acres based on the NASS August Crop Production report. Harvested area is reduced 15 percent to 7.4 million acres as dryness in the Southwest raises the expected national abandonment rate from 14 percent to 21 percent. The national average yield for 2025/26 is raised over 6 percent to 862 pounds per harvested acre as higher abandonment in the Southwest results in the harvest of fewer lower-yielding dryland acres. The production forecast is reduced to 13.2 million bales, almost 1.4 million bales below the July forecast and 1.2 million bales lower than 2024/25. Exports are reduced 500,000 bales because of the smaller crop. Beginning stocks for 2025/26 are reduced 100,000 bales following a corresponding increase in exports for 2024/25. As a result of these revisions, ending stocks for 2025/26 are projected at 3.6 million bales, down 1 million from last month, for a stocks-to-use ratio of 26.3 percent. With tighter domestic supplies, the projected season-average upland price for 2025/26 is raised this month to 64 cents per pound.

In the 2025/26 world cotton balance sheet, production, consumption, trade, and beginning and ending stocks are all lowered compared to last month. World production is forecast 1.8 million bales lower as a result of reductions for the United States, Sudan, Uzbekistan, and Mali that more than offset a larger crop in China. The forecast for world consumption is reduced over 100,000 bales as lower mill use in India, Bangladesh, and Turkey more than offsets an increase for China. World trade is reduced 1.1 million bales with projected exports lowered for the United States, Sudan, Mali, and small changes elsewhere. Beginning stocks for 2025/26 are reduced over 1.7 million bales, largely reflecting higher 2024/25 consumption in China and Brazil. With lower beginning stocks and production, ending stocks for 2025/26 are reduced by over 3.4 million bales.



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Global

US Weekly Export Sales

- Net sales of UPLAND totaling 2,42,000 RB for 2025-2026 primarily for Vietnam (1,19,200 RB, including decreases of 1,500 RB), Bangladesh (40,200 RB, including decreases of 2,300 RB), Turkey (20,700 RB), Pakistan (15,600 RB, including 1,100 RB switched from Vietnam), and Mexico (14,100 RB), were offset by reductions for Thailand (300 RB).
- Total net UPLAND sales of 1,100 RB for 2026-2027 were for Japan.
- UPLAND Exports of 1,42,600 RB were primarily to Vietnam (34,800 RB), Pakistan (26,200 RB), Turkey (19,300 RB), Mexico (9,300 RB), and Bangladesh (9,000 RB).
- Net sales of PIMA totaling 2,100 RB for 2025-2026 primarily for India (2,400 RB), Turkey (300 RB), South Korea (300 RB), Bangladesh (300 RB), and Guatemala (100 RB), were offset by reductions for China (1,300 RB).
- PIMA Exports of 12,000 RB were primarily to Pakistan (2,700 RB), Vietnam (2,500 RB), India (2,300 RB), Costa Rica (900 RB), and Egypt (900 RB).

US Export Sales 07-Aug-2025	
Marketing Year 2025-26	
Upland Gross Sales	2,46,900
Cancellation	4,900
Net Upland Sales	2,42,000
PIMA Gross Sales	3,400
Cancellation	1,300
Net PIMA Sales	2,100
Total Gross Sales	2,50,300
Total Cancellation	6,200
Total Net Sales	2,44,100
Shipments	
UPLAND	1,42,600
PIMA	12,000
Total Shipment	1,54,600
Marketing Year 2026-27	
Net Upland Sales	1,100
Net PIMA Sales	0
Total Net Sales	1,100
All Figures in US Running Bale	



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Gujarat Spot Rate Weekly Changes						
Variety	Staple Length	Mic.	09-08-2025	16-08-2025	Change	Change (in Per.)
					W/W	W/W
Shankar 6	29mm	3.8	56,600	56,950	350	0.61%
V-797	13% Trash		39,150	39,100	-50	-0.13%
MCX Spot Rate			56,780	56,920	140	0.25%
USD-INR Exchange			87.66	87.55	-0.11	-0.13%

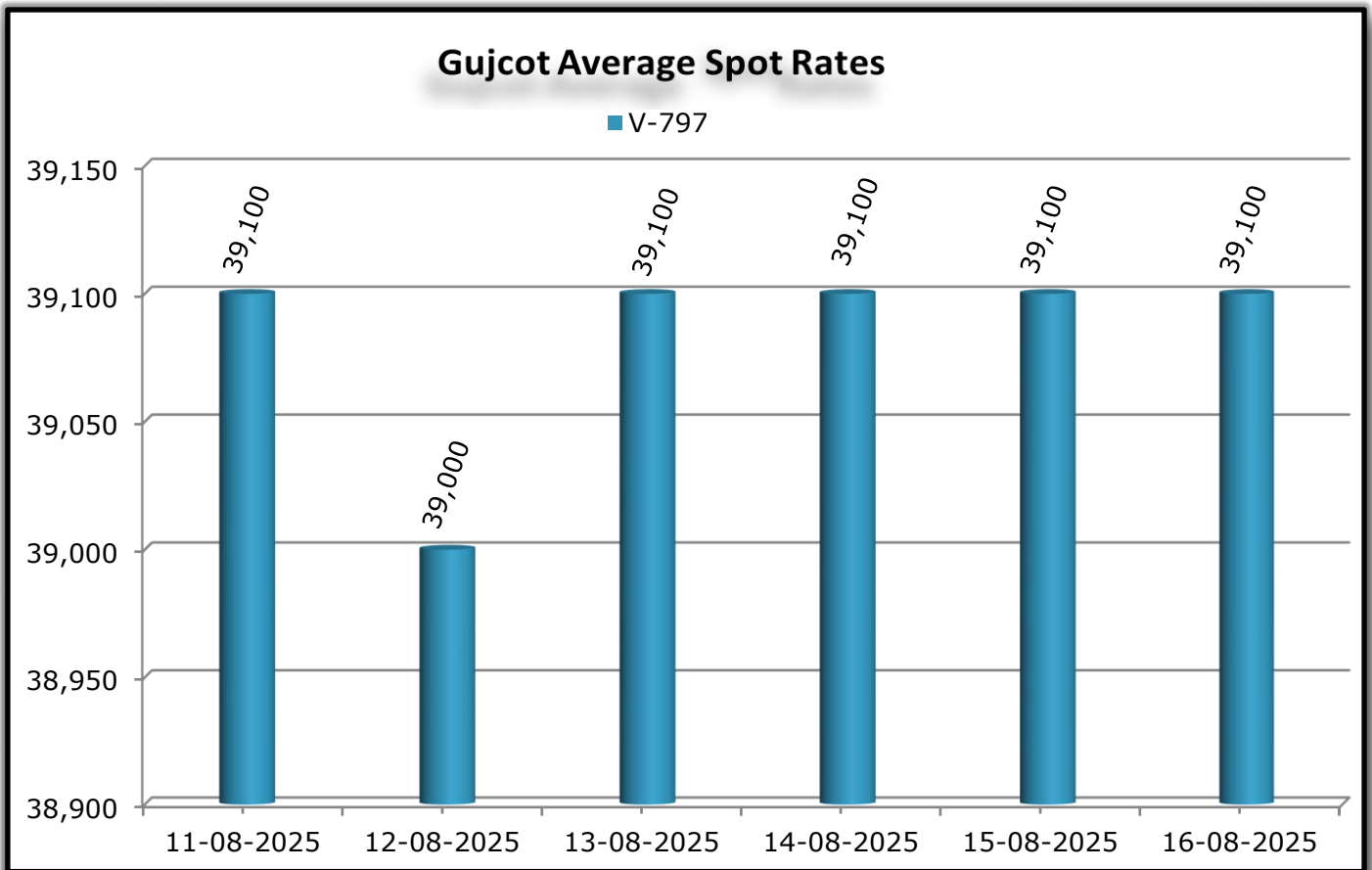
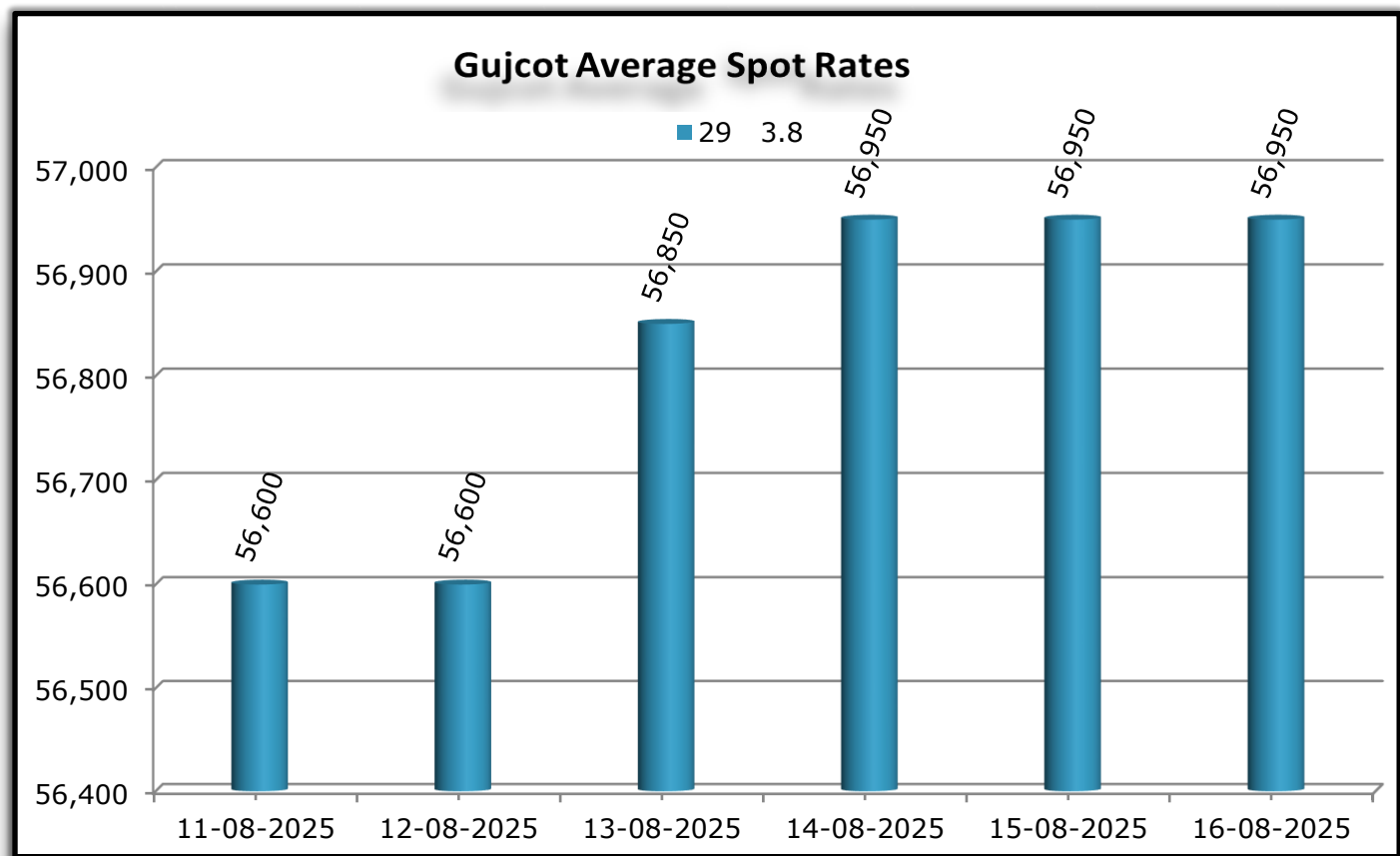
Average Rate of Last week					
Variety	Staple Length	Mic.	Price Range		Average Of 6 Days
			Low	High	
Shankar 6	29	3.8	56,600	56,950	56,817
Shankar 6	28.5	3.7	No Quote	No Quote	No Quote
Shankar 6	28	3.6	No Quote	No Quote	No Quote
Shankar 6	27	3.2	No Quote	No Quote	No Quote
Shankar 6	26	3.0	No Quote	No Quote	No Quote
V-797	13% Trash		39,000	39,100	39,083
MCX Spot Rate			56,860	56,920	56,903
USD Exchange Rate			87.44	87.71	87.58

Rate Of Last Week				
Date	29 3.8	V-797	MCX Spot Rate	USD-INR Exchange
11-08-2025	56,600	39,100	56,860	87.66
12-08-2025	56,600	39,000	56,900	87.71
13-08-2025	56,850	39,100	56,900	87.44
14-08-2025	56,950	39,100	56,920	87.55
15-08-2025	56,950	39,100	56,920	87.55
16-08-2025	56,950	39,100	56,920	87.55



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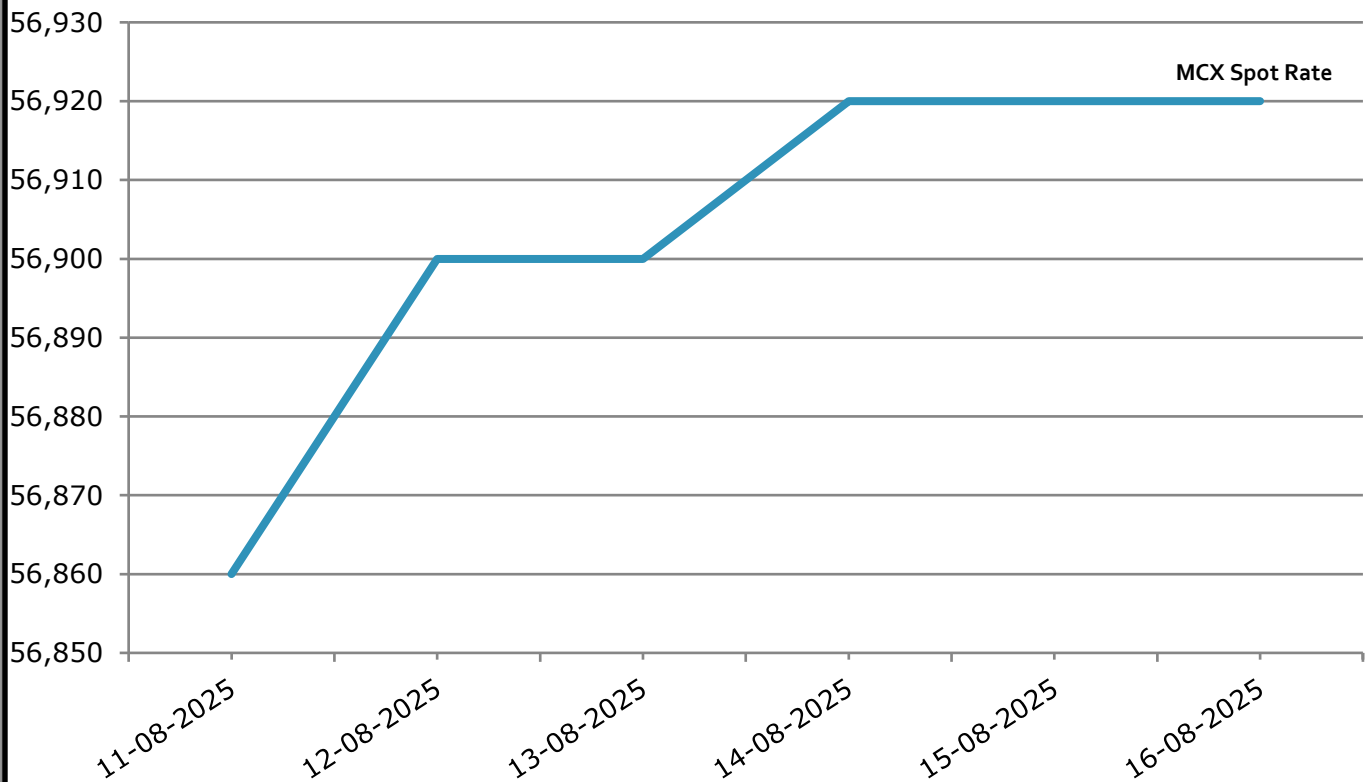




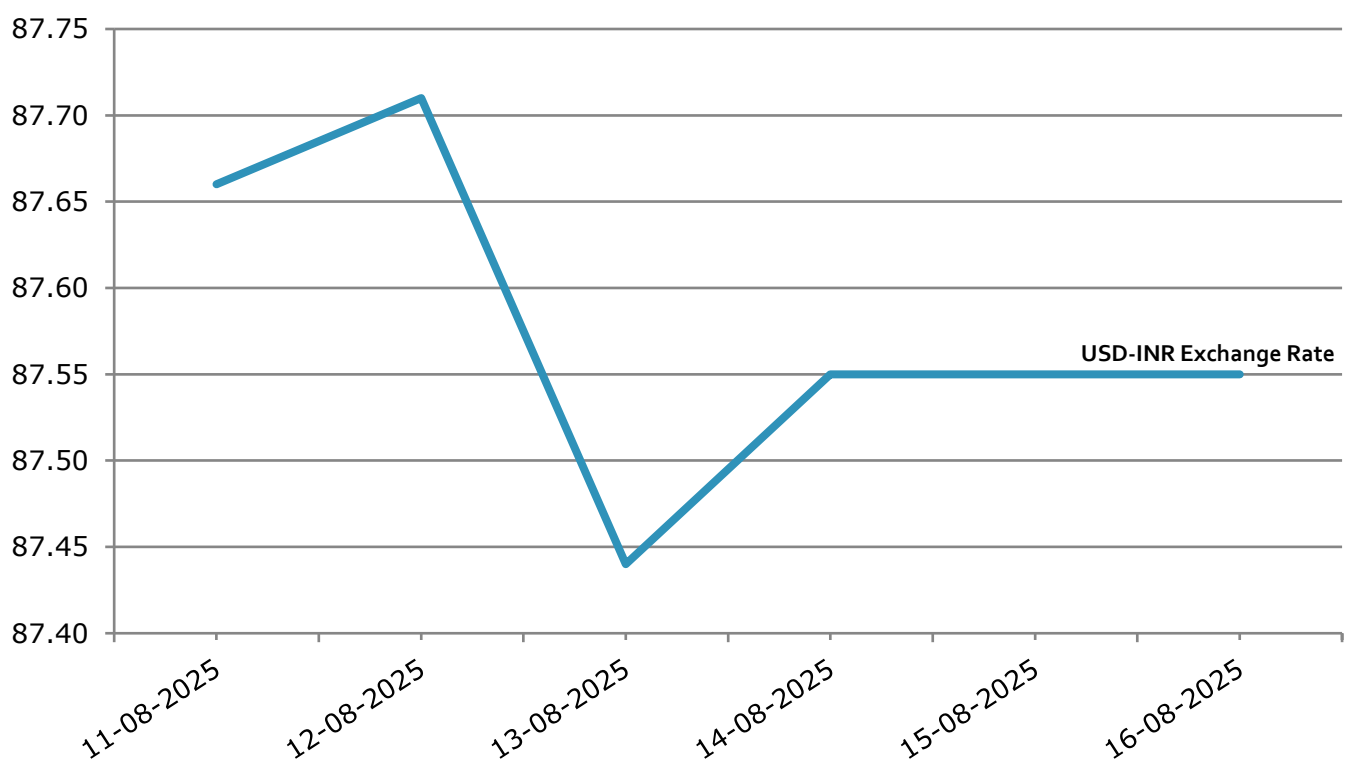
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MCX Spot Rate Closing Of The Days'



USD-INR Exchange Rate Closing Of The Days'



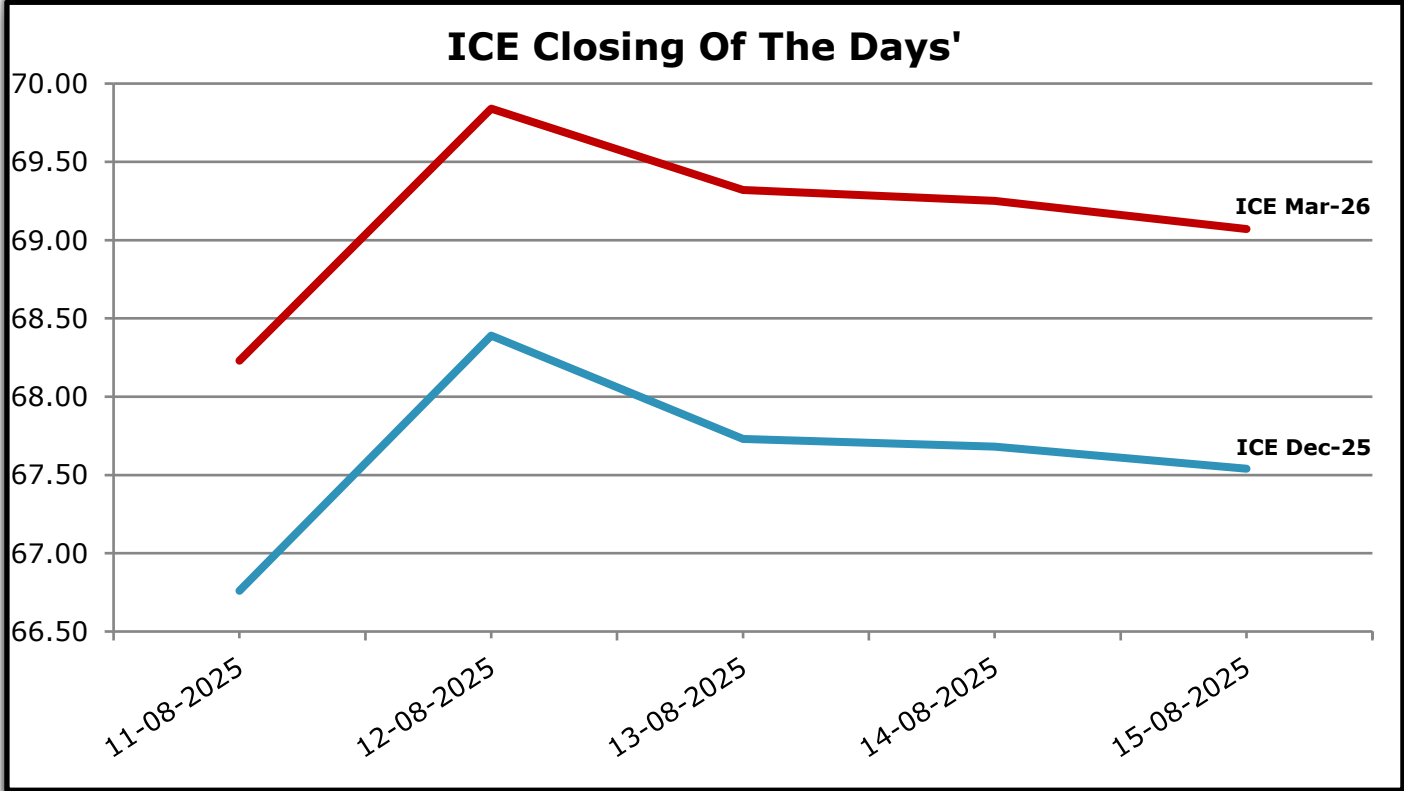
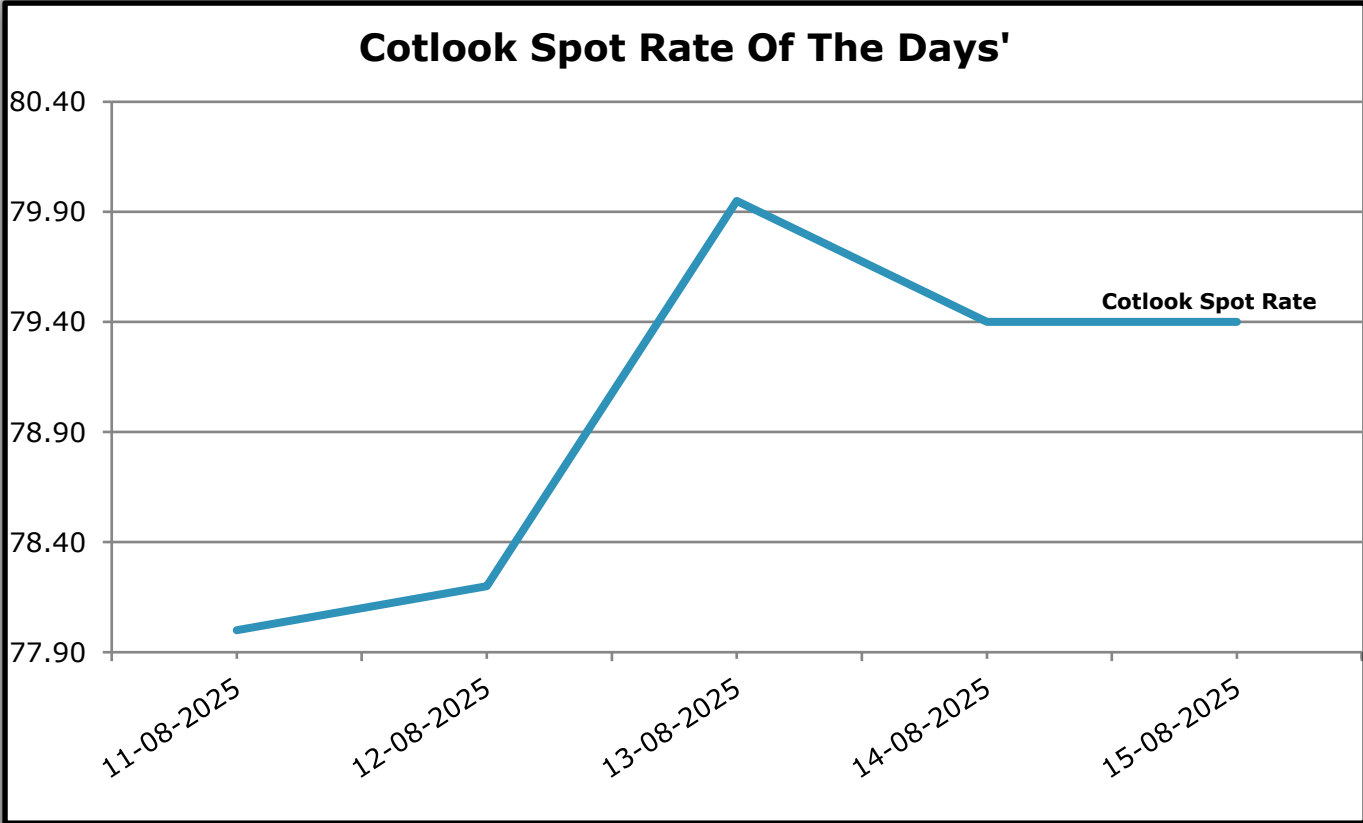


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Foreign Indices			
Date	Cotlook	ICE	
	Spot Rate	Dec-25	Mar-26
11-08-2025	78.00	66.76	68.23
12-08-2025	78.20	68.39	69.84
13-08-2025	79.95	67.73	69.32
14-08-2025	79.40	67.68	69.25
15-08-2025	79.40	67.54	69.07

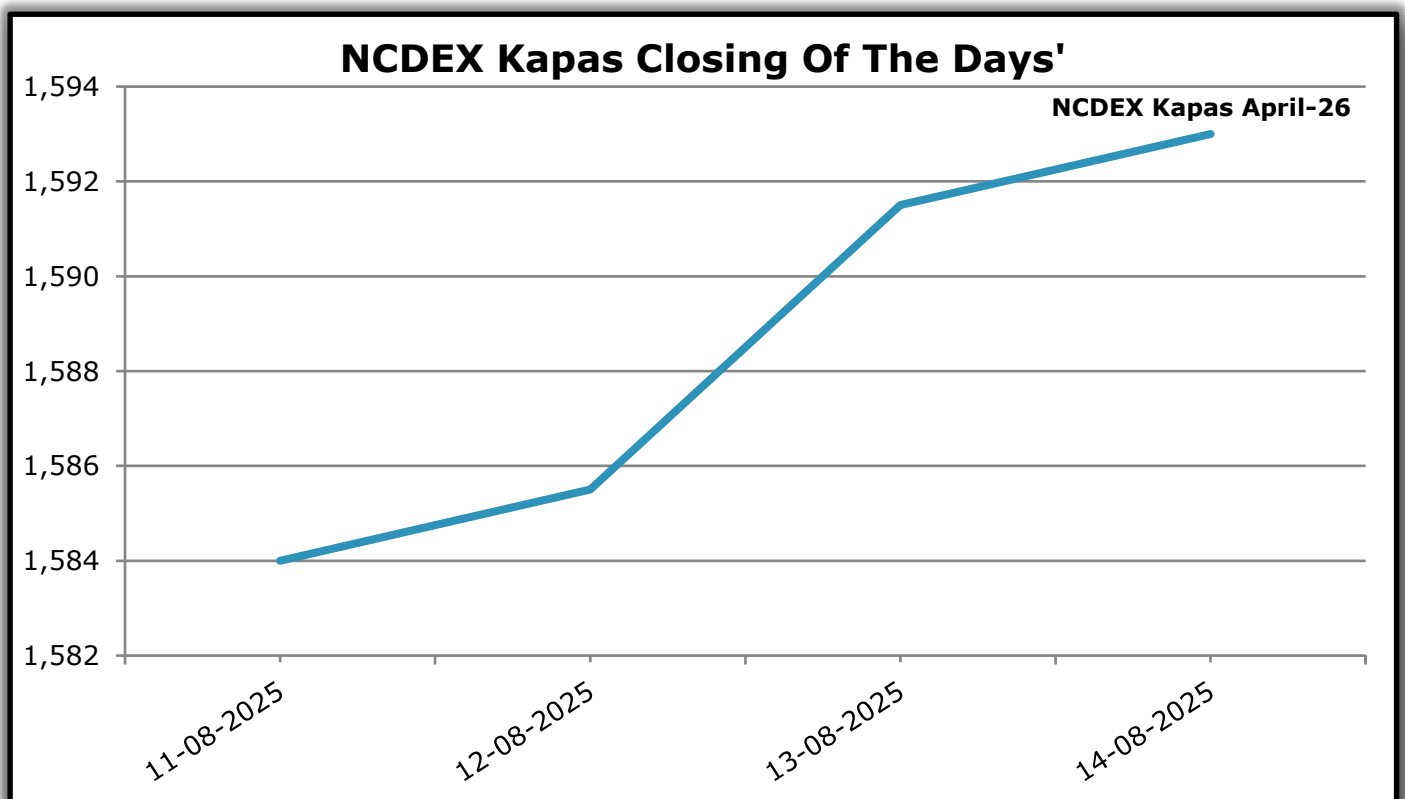




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Indian Indices	
Date	NCDEX Kapas
	April-26
11-08-2025	1,584.00
12-08-2025	1,585.50
13-08-2025	1,591.50
14-08-2025	1,593.00

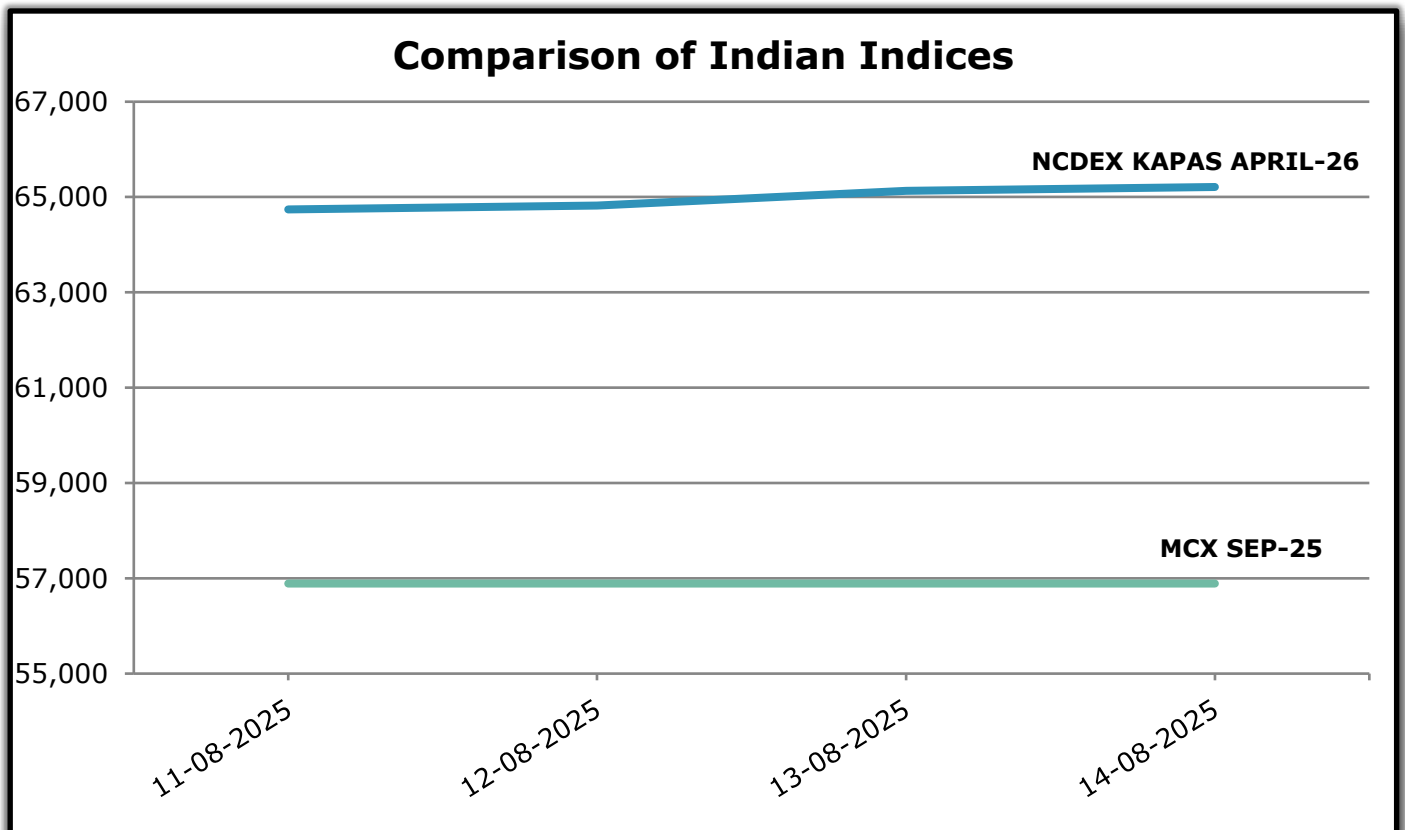




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Indian Indices in Candy Rate		
Date	NCDEX Kapas	MCX
	April-26	Sep-25
11-08-2025	64,740	56,890
12-08-2025	64,819	56,890
13-08-2025	65,132	56,890
14-08-2025	65,211	56,890
Remark :- For NCDEX Kapas we have taken seed rate 600/20 Kg to convert in Candy.		

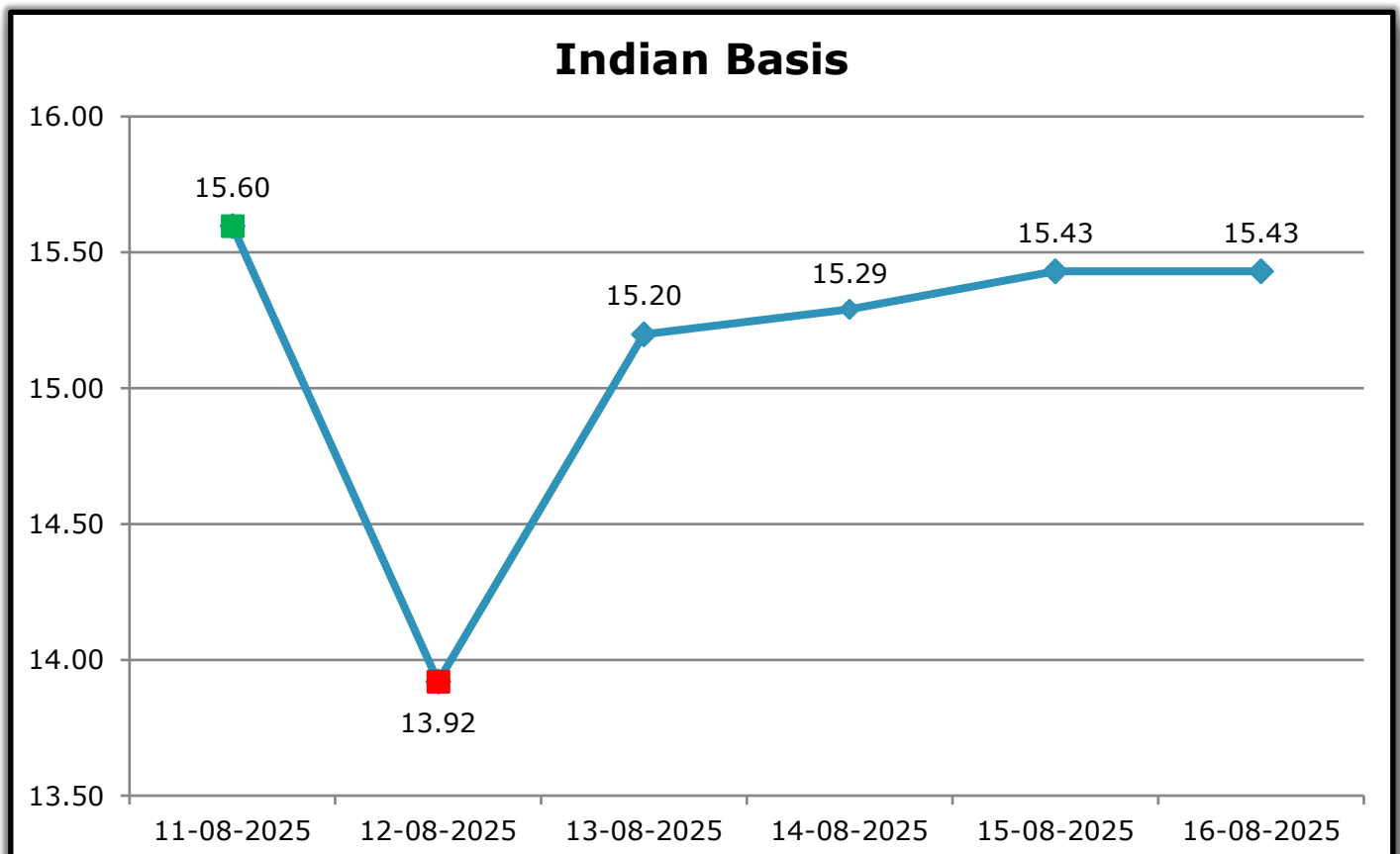




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Indian Basis					
DATE	29 MM	USD-INR	CENTS/LB	ICE DEC	BASIS
11-08-2025	56,600	87.66	82.36	66.76	15.60
12-08-2025	56,600	87.71	82.31	68.39	13.92
13-08-2025	56,850	87.44	82.93	67.73	15.20
14-08-2025	56,950	87.55	82.97	67.68	15.29
15-08-2025	56,950	87.55	82.97	67.54	15.43
16-08-2025	56,950	87.55	82.97	67.54	15.43





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IN THE WEEK AHEAD

- On Thursday, August 21, the USDA will release its U.S. Weekly Export Report for the week ended August 14 at 8:30 am EST, followed by the CFTC Cotton On-Call Report for the week ended August 15 at 3:30 pm EST. On Friday, August 22, the CFTC Commitment of Traders Report for the week ended August 19 will be published at 3:30 pm EST.

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