



GUJCOT TRADE ASSOCIATION

WEEKLY REPORT 30-Aug-2025

Market Movement from 25th Aug 2025 to 30th Aug 2025.

- NY December cotton has been trading in a narrow range of 66–69 cents for the past couple of months. This week, it closed with a week-over-week loss of 147 points.
- U.S. cotton export sales for the week ending 21-Aug-2025 showed a solid performance for the 2025-2026 marketing year, with net upland sales of 1,79,300 bales and shipments of 1,12,700 bales. Net Pima sales were reported at 3,900 bales, while Pima shipments stood at 14,000 bales. This brought the total weekly sales to 1,83,200 bales. For the 2026-2027 marketing year, there were no reported upland or Pima sales, keeping total forward sales at zero.

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	35,10,179	36,12,559	1,20,00,000	81,49,740	83,87,441	1,71,172	1,66,321
Shipments	4,09,047	4,20,978	1,20,00,000	1,12,50,872	1,15,79,022	2,36,307	2,29,610



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- The Gujcot Spot Rate opened on Monday at 56,000 and showed a gradual downward trend throughout the week, with Tuesday at 55,900, Wednesday at 55,800, Thursday at 55,600, Friday at 55,500, and on Saturday 55,400, reflecting continuous pressure on prices amid lackluster demand and limited trade activity.
- The Indian physical cotton market has witnessed a sharp decline after the government removed import duty until 31st December. At present, duty-free foreign cotton is significantly cheaper than domestic cotton, giving large mills the opportunity to cover their entire requirements at lower rates. However, in India, the MSP will continue to keep domestic prices comparatively high, creating intense pressure on the CCI to procure large quantities, while ginners will struggle to operate under such circumstances.
- Indian mills have a good opportunity for a level playing field, as most of their requirements will be covered through imports, enabling them to compete effectively with rivals.



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- The monsoon is progressing well. In the South, some new arrivals have already started, and Haryana is also preparing to begin the new season.
- All-India cotton sowing has reached 108.47 lakh hectares, of which Gujarat contributes 20.72 lakh hectares.
- Indian basis is currently declining along with some weakness in the physical market, but ICE futures are still not providing support.
- During this week, the Indian basis remained between 13.59 and 14.61.
- This week, the USD-INR exchange rate opened at 87.58 on Monday, moved slightly higher to 87.68 on Tuesday and remained unchanged on Wednesday, eased to 87.63 on Thursday, and finally spiked to 88.19 on Friday, marking a sharp weekly gain driven by strong dollar momentum.
- **Hope for best**



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Gujarat District wise Cotton Sowing

Gujarat Districtwise Cotton Sowing Till 25-August-2025			
Kutch	772	Saurashtra	14,753
Kutch	772	Surendranagar	3,825
		Rajkot	1,186
North Gujarat	1,648	Jamnagar	867
Banarsakantha	191	Porbandar	41
Patan	394	Junagadh	302
Mehsana	278	Amreli	2,663
Sabarkantha	422	Bhavnagar	2,092
Gandhinagar	174	Morbi	2,081
Aravali	189	Botad	1,531
		Gir Somnath	114
Middle Gujarat	2,047	Devbhumi Dwarka	50
Ahmedabad	397		
Anand	4	South Gujarat	1,495
Kheda	170	Surat	22
Panchmahal	86	Narmada	485
Dahod	7	Bharuch	880
Vadodara	517	Dang	0
Mahisagar	85	Navsari	0
Chota Udaipur	781	Valsad	0
		Tapi	108
TOTAL			20,716
TOTAL (Last Year)			23,611
SUMMARY			
Zone	2025-26	2024-25	Change
Kutch	772	732	40
North Gujarat	1,648	1,926	-278
Middle Gujarat	2,047	2,800	-753
Saurashtra	14,753	16,608	-1,855
South Gujarat	1,495	1,545	-50
TOTAL	20,716	23,611	-2,895
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 30-08-2025				
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	20.716	23.611	-2.895	-12.26%
Maharashtra	38.440	40.767	-2.327	-5.71%
Madhya Pradesh	5.700	6.149	-0.449	-7.30%
Central India	64.856	70.527	-5.671	-8.04%
Telangana	18.318	17.264	1.054	6.11%
Andra Pradesh	3.870	3.590	0.280	7.80%
Karnataka	7.499	6.730	0.769	11.43%
South Zone	29.687	27.584	2.103	7.62%
Tamil Nadu	2.441	2.733	-0.292	-10.68%
Orissa				
Others				
All India	108.470	111.736	-3.266	-2.92%



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Global

US Weekly Export Sales

- Net sales of UPLAND totaling 1,79,300 RB for 2025-2026 primarily for Vietnam (88,400 RB, including 200 RB switched from Japan), Bangladesh (37,800 RB), Pakistan (13,300 RB), Mexico (7,500 RB), and Nicaragua (7,300 RB), were offset by reductions for Peru (1,700 RB) and El Salvador (100 RB).
- UPLAND Exports of 1,12,700 RB were primarily to Vietnam (41,000 RB), Bangladesh (11,500 RB), India (10,900 RB), Mexico (7,600 RB), and Turkey (6,500 RB).
- Net sales of PIMA totaling 3,900 RB for 2025-2026 were reported for India (1,800 RB), Peru (1,100 RB), Bangladesh (600 RB), Vietnam (300 RB), and Japan (100 RB).
- PIMA Exports of 14,000 RB were primarily to India (6,700 RB), Vietnam (3,100 RB), Pakistan (1,300 RB), Costa Rica (900 RB), and Peru (900 RB).

US Export Sales	21-Aug-2025
Marketing Year 2025-26	
Upland Gross Sales	1,82,800
Cancellation	3,500
Net Upland Sales	1,79,300
PIMA Gross Sales	3,900
Cancellation	0
Net PIMA Sales	3,900
Total Gross Sales	1,86,700
Total Cancellation	3,500
Total Net Sales	1,83,200
Shipments	
UPLAND	1,12,700
PIMA	14,000
Total Shipment	1,26,700
Marketing Year 2026-27	
Net Upland Sales	0
Net PIMA Sales	0
Total Net Sales	0
All Figures in US Running Bale	



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Gujarat Spot Rate Weekly Changes						
Variety	Staple Length	Mic.	23-08-2025	30-08-2025	Change	Change (in Per.)
					W/W	W/W
Shankar 6	29mm	3.8	55,950	55,400	-550	-0.99%
V-797	13% Trash		38,550	37,950	-600	-1.58%
MCX Spot Rate			56,040	55,600	-440	-0.79%
USD-INR Exchange			87.53	88.19	0.66	0.75%

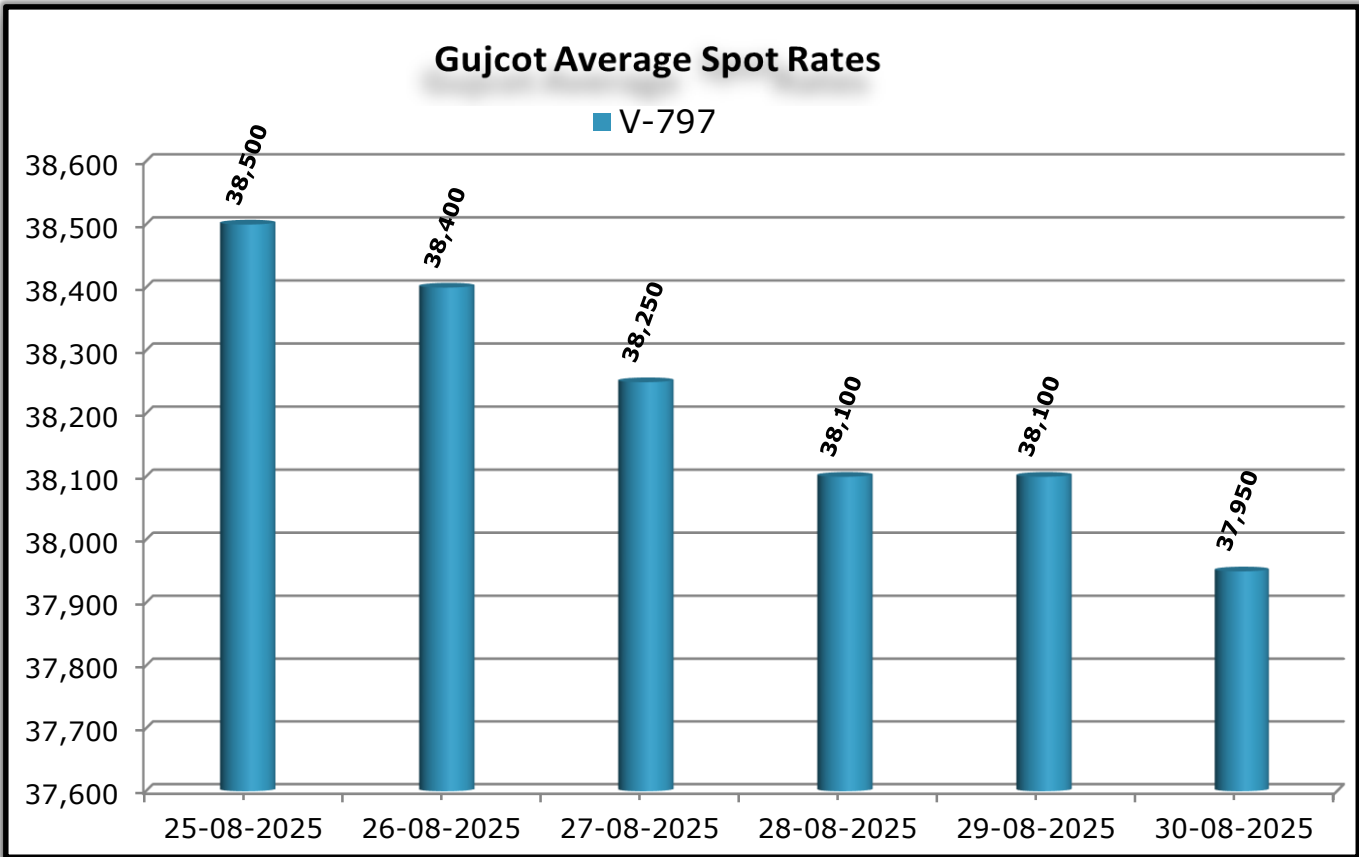
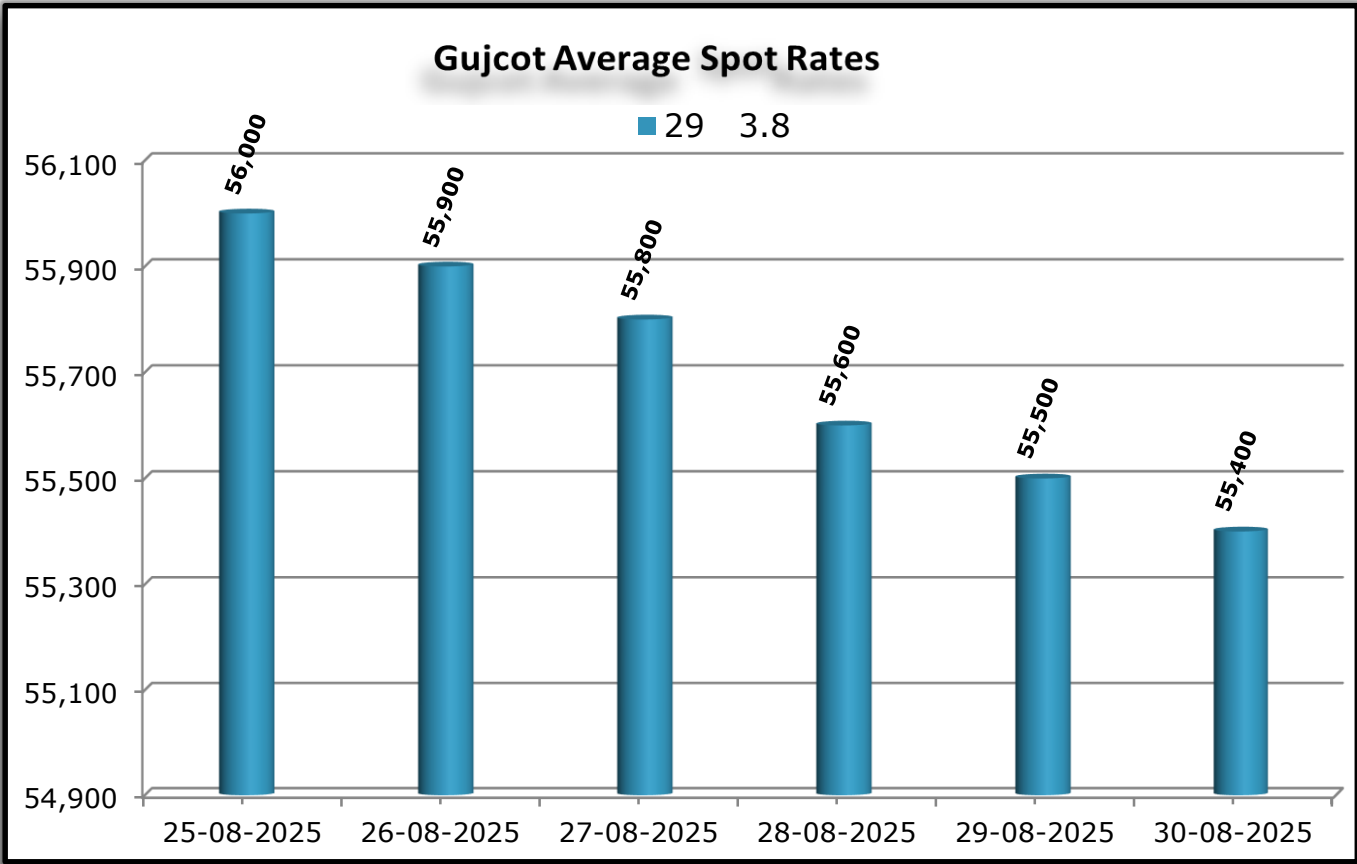
Average Rate of Last week					
Variety	Staple Length	Mic.	Price Range		Average Of 6 Days
			Low	High	
Shankar 6	29	3.8	55,400	56,000	55,700
Shankar 6	28.5	3.7	No Quote	No Quote	No Quote
Shankar 6	28	3.6	No Quote	No Quote	No Quote
Shankar 6	27	3.2	No Quote	No Quote	No Quote
Shankar 6	26	3.0	No Quote	No Quote	No Quote
V-797	13% Trash		37,950	38,500	38,217
MCX Spot Rate			55,600	56,220	55,867
USD Exchange Rate			87.58	88.19	87.83

Rate Of Last Week				
Date	29 3.8	V-797	MCX Spot Rate	USD-INR Exchange
25-08-2025	56,000	38,500	56,220	87.58
26-08-2025	55,900	38,400	56,040	87.68
27-08-2025	55,800	38,250	56,040	87.68
28-08-2025	55,600	38,100	55,700	87.63
29-08-2025	55,500	38,100	55,600	88.19
30-08-2025	55,400	37,950	55,600	88.19



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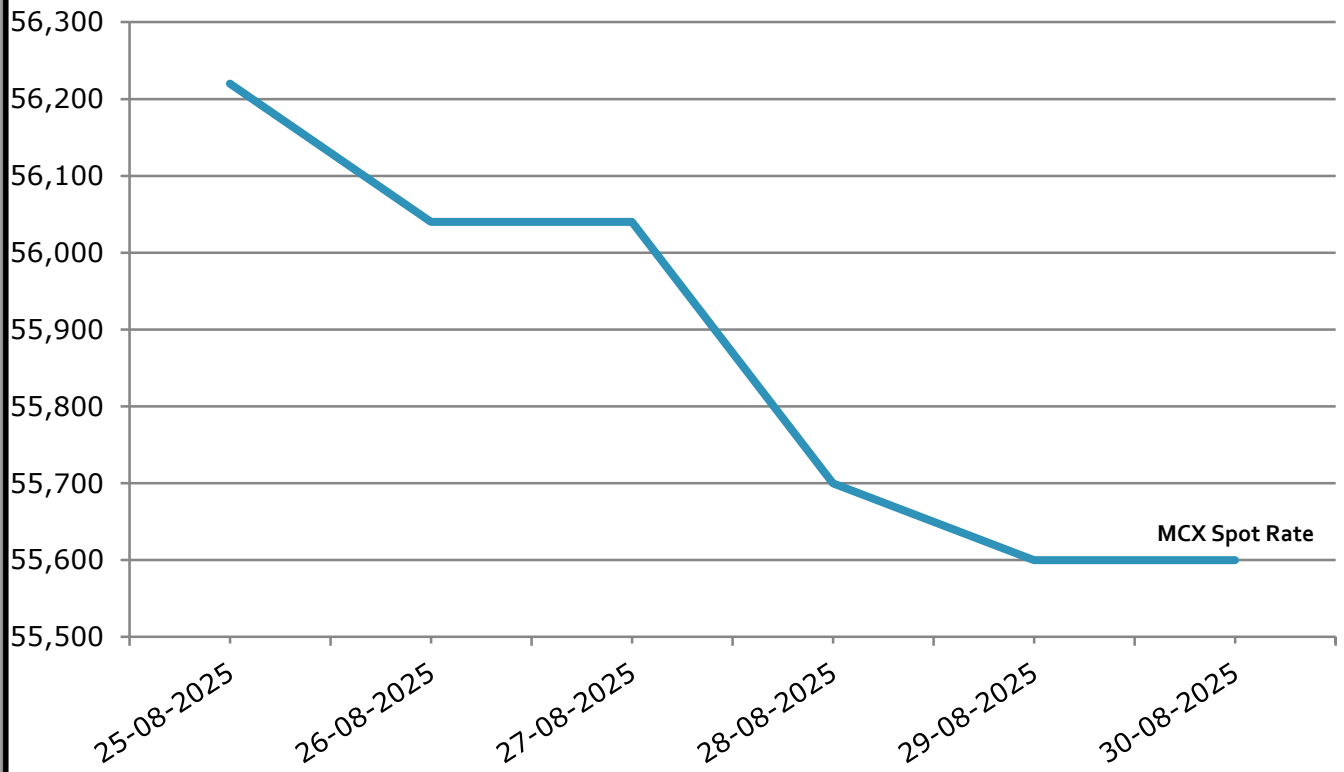




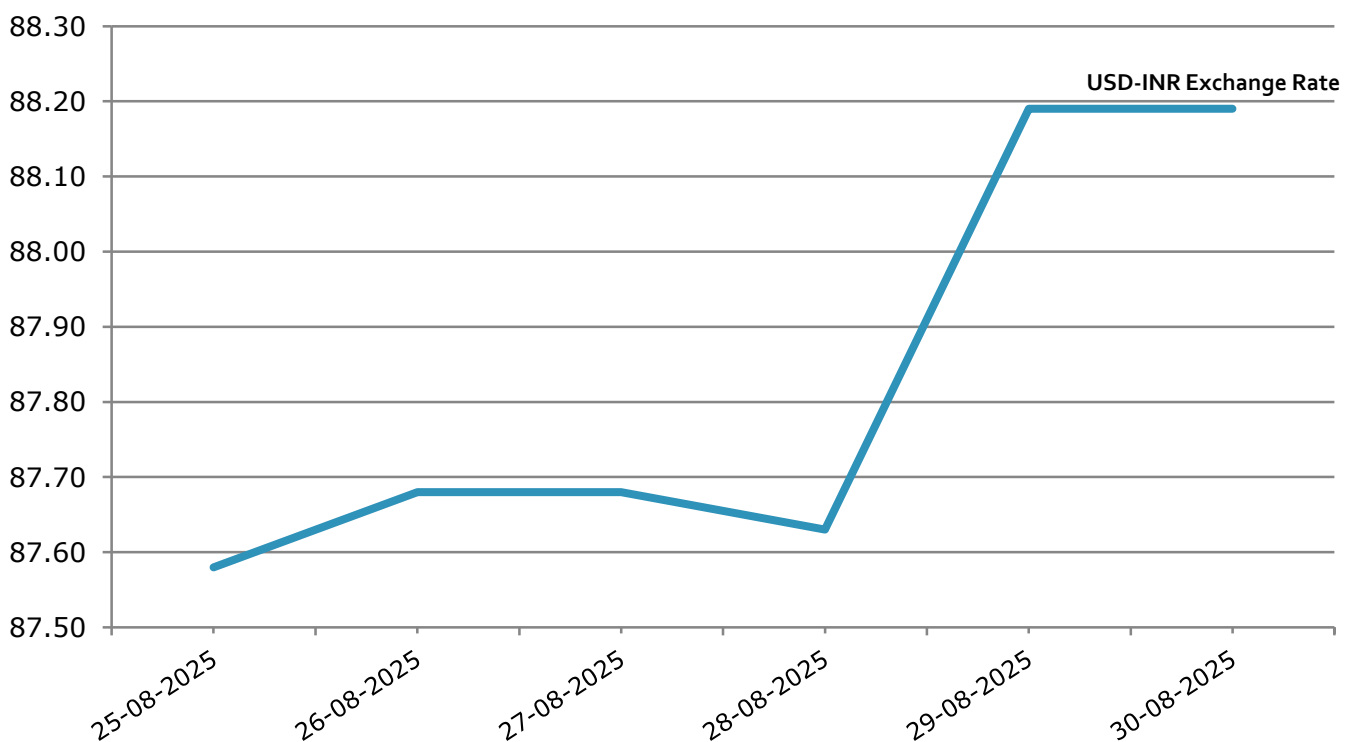
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MCX Spot Rate Closing Of The Days'



USD-INR Exchange Rate Closing Of The Days'



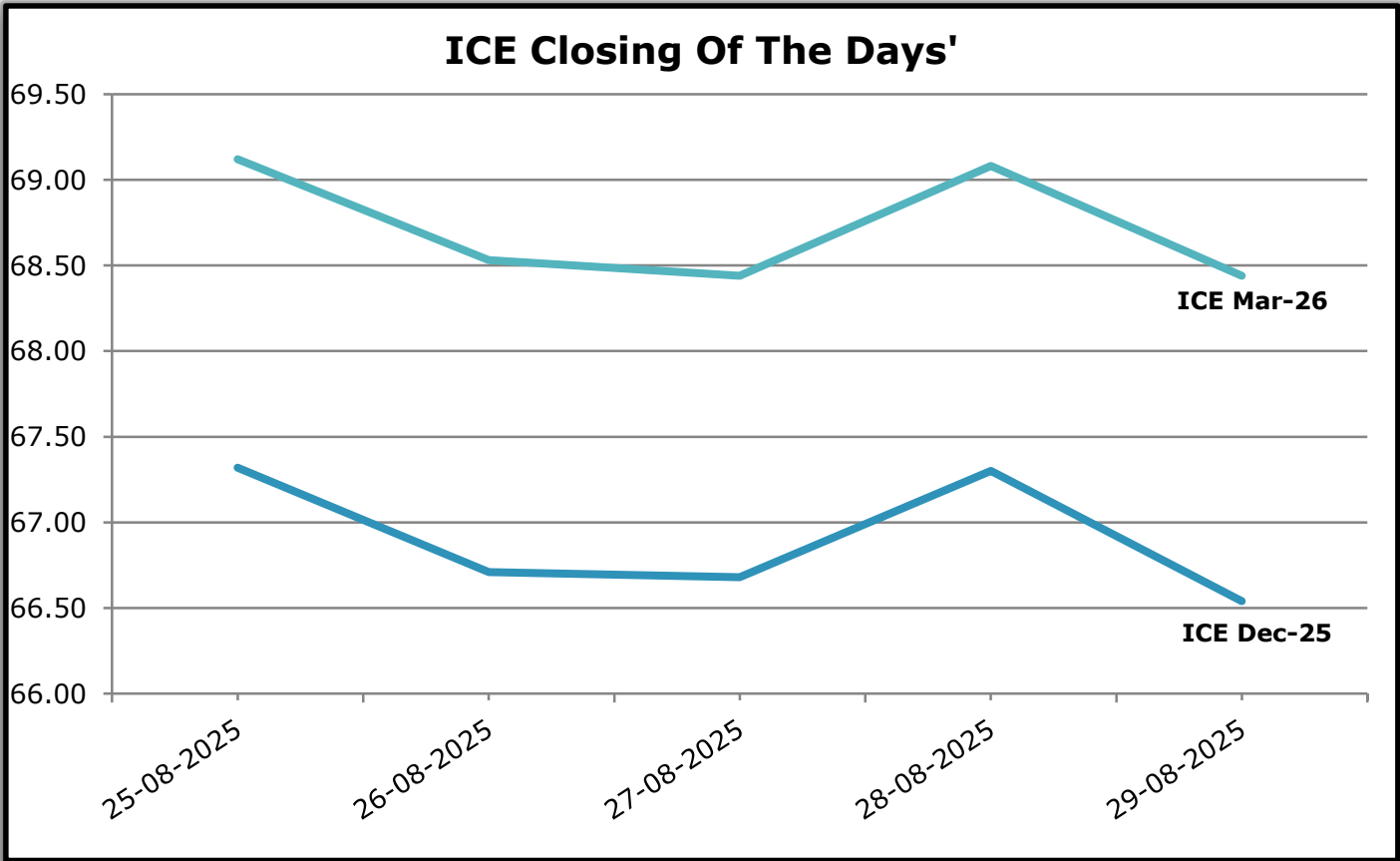
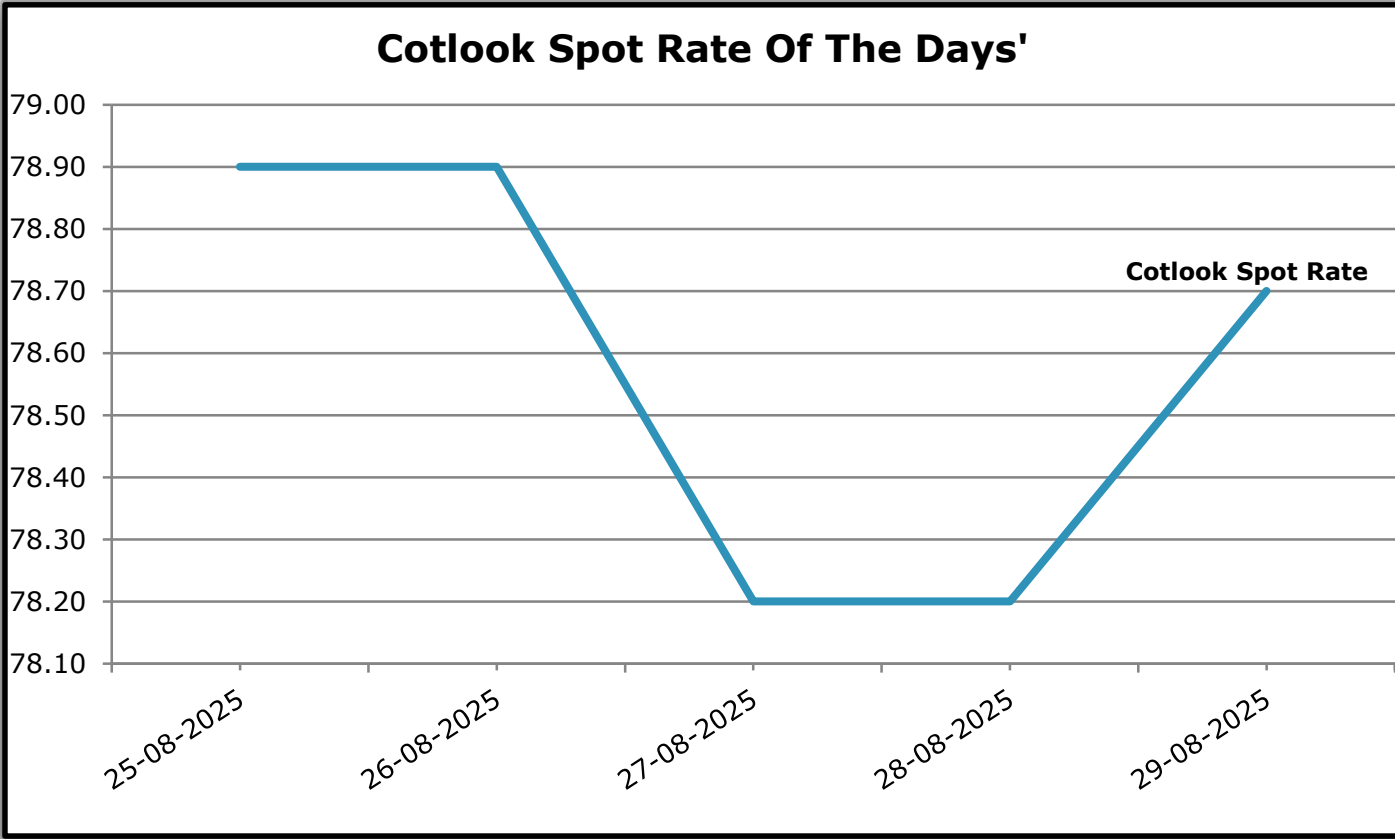


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Foreign Indices			
Date	Cotlook	ICE	
	Spot Rate	Dec-25	Mar-26
25-08-2025	78.90	67.32	69.12
26-08-2025	78.90	66.71	68.53
27-08-2025	78.20	66.68	68.44
28-08-2025	78.20	67.30	69.08
29-08-2025	78.70	66.54	68.44



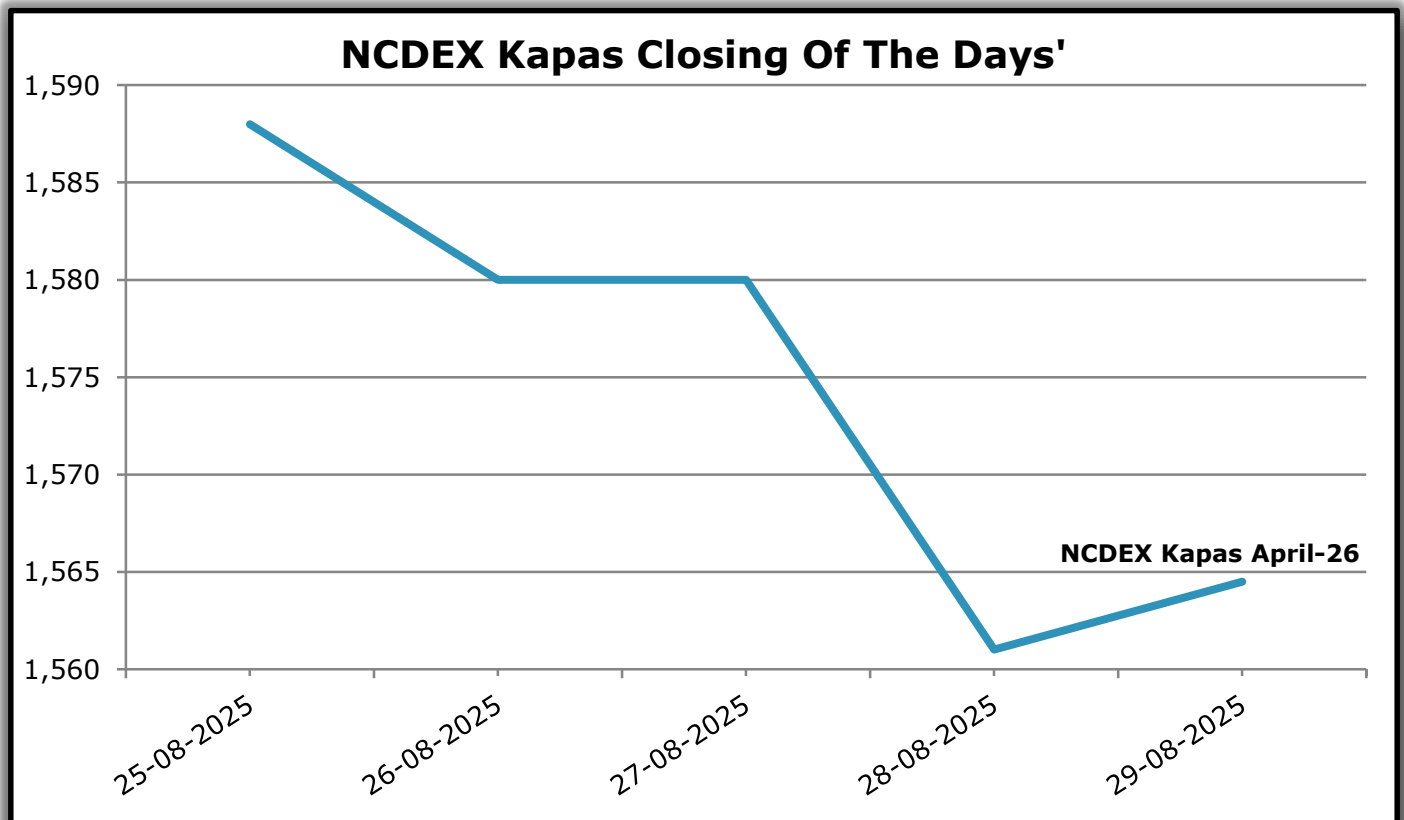


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Indian Indices	
Date	NCDEX Kapas
	April-26
25-08-2025	1,588.00
26-08-2025	1,580.00
27-08-2025	1,580.00
28-08-2025	1,561.00
29-08-2025	1,564.50

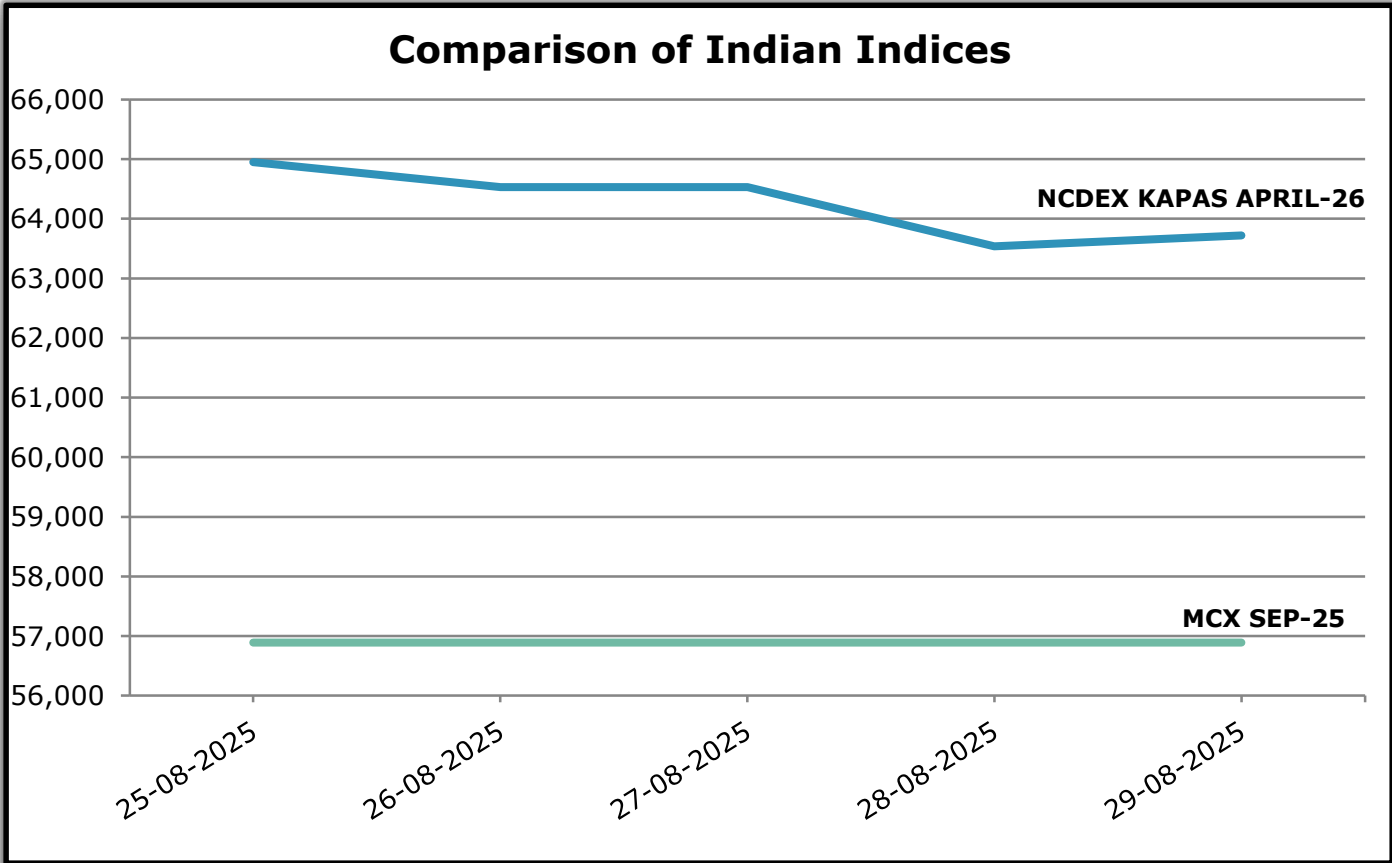




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Indian Indices in Candy Rate		
Date	NCDEX Kapas	MCX
	April-26	Sep-25
25-08-2025	64,949	56,890
26-08-2025	64,531	56,890
27-08-2025	64,531	56,890
28-08-2025	63,537	56,890
29-08-2025	63,720	56,890
Remark :- For NCDEX Kapas we have taken seed rate 600/20 Kg to convert in Candy.		

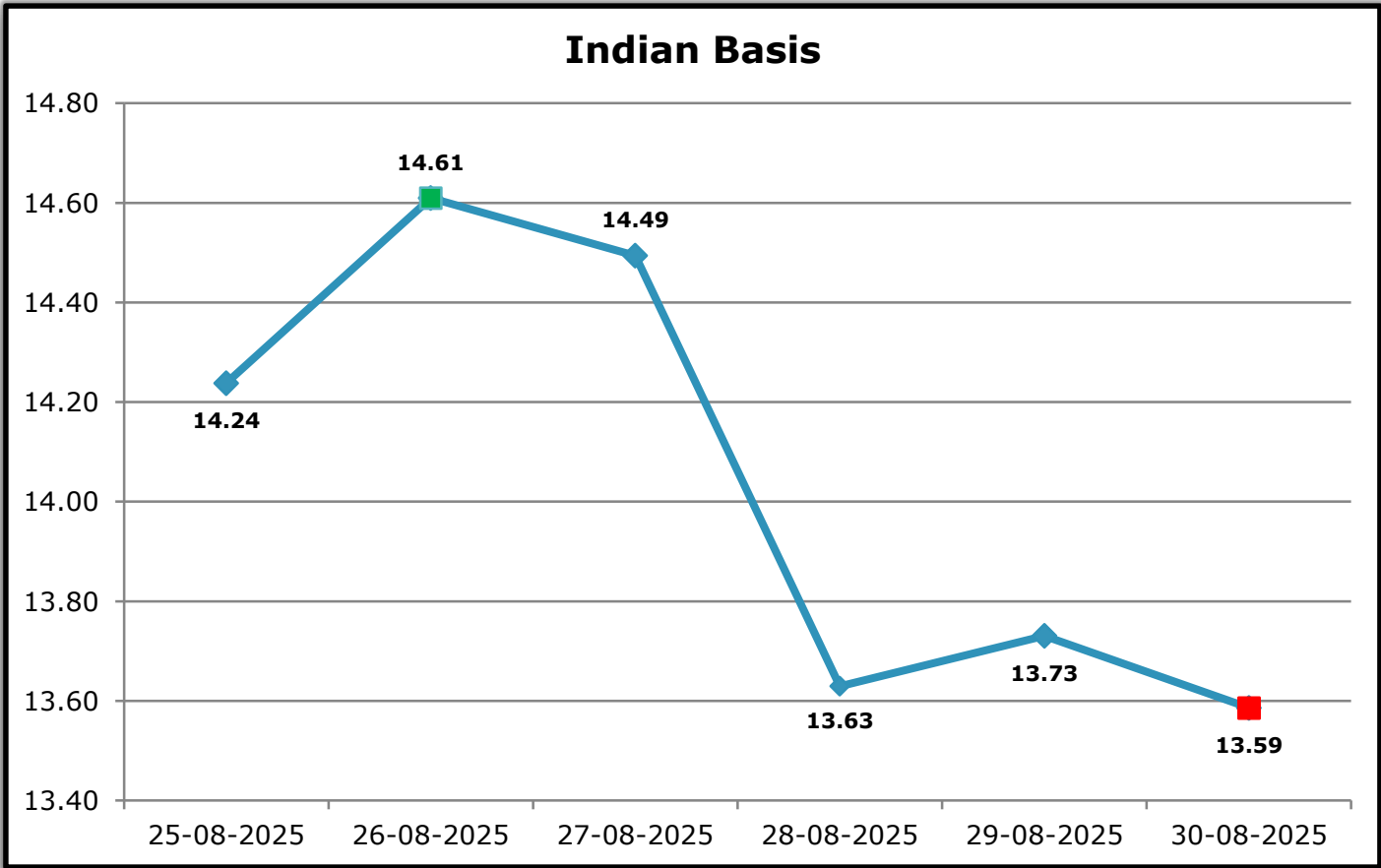




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Indian Basis					
DATE	29 MM	USD-INR	CENTS/LB	ICE Dec	BASIS
25-08-2025	56,000	87.58	81.56	67.32	14.24
26-08-2025	55,900	87.68	81.32	66.71	14.61
27-08-2025	55,800	87.68	81.17	66.68	14.49
28-08-2025	55,600	87.63	80.93	67.30	13.63
29-08-2025	55,500	88.19	80.27	66.54	13.73
30-08-2025	55,400	88.19	80.13	66.54	13.59





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IN THE WEEK AHEAD

- The coming week will be relatively light on events, with ICE remaining closed on Monday, September 1, for the Labor Day holiday. On Thursday, September 4, the CFTC will release its Cotton On-Call Report for the week ending August 29 at 3:30 PM EST. Friday, September 5, will bring two key updates: the USDA U.S. Weekly Export Report for the week ending August 28 at 8:30 AM EST, followed later in the day by the CFTC Commitment of Traders Report for the week ending September 2 at 3:30 PM EST.

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