



GUJCOT TRADE ASSOCIATION

WEEKLY REPORT 21-Jun-2025

Market Movement from 16th Jun 2025 to 21st Jun 2025.

- NY July futures remained under pressure this week, closing lower as bearish macroeconomic sentiment outweighed supportive fundamentals. July settled at 65.36 cents on 13th June and declined to 64.04 cents on 20th June, registering a week-over-week loss of 1.32 cents. Now December will be the lead month, and it closed the week with a loss of 114 points W/W.
- In the latest U. S. Export Sales Report for the week ending 12-Jun-2025, U.S. export sales showed a strong performance, with total net sales of 81,300 bales for the 2024-2025 season, consisting of 83,200 bales of upland cotton and a net reduction of 1,900 bales of Pima. Upland shipments stood at 2,04,700 bales, while Pima shipments were 3,000 bales. Looking ahead to the 2025-2026 season, net upland sales surged to 2,74,900 bales along with 6,500 bales of Pima, bringing total forward sales to 2,81,400 bales — indicating robust demand for the new crop.



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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	1,21,21,868	1,24,75,422	1,15,00,000	-9,47,779	-9,75,422	0	0
Shipments	1,01,23,408	1,04,18,674	1,15,00,000	10,50,681	10,81,326	1,80,221	1,75,114

- This week, Gujcot Spot Rate showed a mildly firm trend. It opened at ₹53,850 on Monday, rose to ₹54,050 on Tuesday, and further increased to ₹54,150 on both Wednesday and Thursday. However, a slight correction was seen on Friday as the rate eased to ₹54,000, and on Saturday it stood at ₹53,950.
- All-India cotton arrivals averaged around 20,000 bales per day. The higher cottonseed prices supported kapas rates, allowing the remaining farmers to secure better prices for their produce.
- CCI has further reduced the price by ₹500 per candy but is still unable to offload a large quantity. Major mills are already covered with sufficient inventory. Therefore, CCI needs to identify and target a larger number of small buyers. To attract these small units, CCI should introduce a new policy tailored to suit their requirements.



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- Due to the ongoing war situation and adverse macroeconomic factors, mills are struggling to find buyers in international markets. Additionally, Indian yarn prices remain comparatively higher, further impacting export demand.
- All-India cotton sowing has reached 23.827 lakh hectares, while cotton sowing in Gujarat stands at 1.877 lakh hectares.
- During this week, the Indian basis remained between 14.37 and 15.51.
- During the week, the USD-INR exchange rate showed a steady upward trend. It opened at 86.06 on Monday and gradually increased each day, reaching 86.24 on Tuesday, 86.48 on Wednesday, and 86.72 on Thursday before slightly easing to 86.58 on Friday. Overall, the rupee weakened against the dollar through the week.
- **Hope for best**



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Gujarat District wise Cotton Sowing

Gujarat Districtwise Cotton Sowing Till 16-June-2025			
Kutch	74	Saurashtra	1,543
Kutch	74	Surendranagar	896
		Rajkot	76
North Gujarat	199	Jamnagar	34
Banarsakantha	32	Porbandar	0
Patan	20	Junagadh	18
Mehsana	84	Amreli	45
Sabarkantha	25	Bhavnagar	67
Gandhinagar	29	Morbi	239
Aravali	11	Botad	160
		Gir Somnath	6
Middle Gujarat	52	Devbhumi Dwarka	2
Ahmedabad	15		
Anand	0	South Gujarat	10
Kheda	4	Surat	0
Panchmahal	1	Narmada	0
Dahod	0	Bharuch	5
Vadodara	16	Dang	0
Mahisagar	0	Navsari	0
Chota Udaipur	15	Valsad	0
		Tapi	5
TOTAL			1,877
TOTAL (Last Year)			2,563
SUMMARY			
Zone	2025-26	2024-25	Change
Kutch	74	170	-96
North Gujarat	199	365	-166
Middle Gujarat	52	74	-22
Saurashtra	1,543	1,899	-356
South Gujarat	10	54	-44
TOTAL	1,877	2,563	-686
All Figures in '00 Hectares			
Source :- Agriculture, Farmers Welfare and Co-operation Department Government of Gujarat			



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Global

US Weekly Export Sales

- Net sales of UPLAND totaling 83,200 RB for 2024-2025 were up 38 percent from the previous week, but down 23 percent from the prior 4-week average. Increases primarily for Vietnam (49,400 RB, including 5,700 RB switched from China, 700 RB switched from South Korea, 100 RB switched from Hong Kong, and decreases of 900 RB), Turkey (15,700 RB, including decreases of 1,200 RB), India (13,700 RB), Bangladesh (2,300 RB), and Taiwan (1,800 RB switched from Malaysia), were offset by reductions for China (5,800 RB), Malaysia (1,800 RB), and Hong Kong (100 RB).
- Net UPLAND sales of 2,74,900 RB for 2025-2026 primarily for Vietnam (78,800 RB), El Salvador (72,300 RB), Honduras (45,700 RB), Indonesia (25,500 RB), and Bangladesh (25,000 RB), were offset by reductions for China (900 RB) and Mexico (100 RB).
- UPLAND Exports of 2,04,700 RB were down 13 percent from the previous week and 24 percent from the prior 4-week average. The destinations were primarily to Vietnam (49,200 RB), Turkey (41,900 RB), Pakistan (39,800 RB), Bangladesh (11,900 RB), and Mexico (10,200 RB).
- Net sales reductions of PIMA totaling 1,900 RB for 2024-2025--a marketing-year low--were down noticeably from the previous week and from the prior 4-week average. Increases primarily for India (1,500 RB, including decreases of 900 RB) and China (1,300 RB), were more than offset by reductions for Egypt (3,000 RB) and Vietnam (2,600 RB).
- Net Sales of PIMA totaling 6,500 RB for 2025-2026 were reported for Egypt (3,000 RB), Vietnam (2,600 RB), and India (900 RB).
- PIMA Exports of 3,000 RB were down 48 percent from the previous week and 61 percent from the prior 4-week average. The destinations were primarily to India (2,300 RB), Colombia (300 RB), and Indonesia (300 RB).

US Export Sales	12-Jun-2025
Marketing Year 2024-25	
Upland Gross Sales	90,000
Cancellation	6,800
Net Upland Sales	83,200
PIMA Gross Sales	4,600
Cancellation	6,500
Net PIMA Sales	-1,900
Total Gross Sales	94,600
Total Cancellation	13,300
Total Net Sales	81,300
Shipments	
UPLAND	2,04,700
PIMA	3,000
Total Shipment	2,07,700
Marketing Year 2025-26	
Net Upland Sales	2,74,900
Net PIMA Sales	6,500
Total Net Sales	2,81,400
All Figures in US Running Bale	



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Gujarat Spot Rate Weekly Changes						
Variety	Staple Length	Mic.	14-06-2025	21-06-2025	Change	Change (in Per.)
					W/W	W/W
Shankar 6	29mm	3.8	53,900	53,950	50	0.09%
V-797	13% Trash		37,900	38,100	200	0.52%
MCX Spot Rate			54,140	54,240	100	0.18%
USD-INR Exchange			86.08	86.58	0.50	0.58%

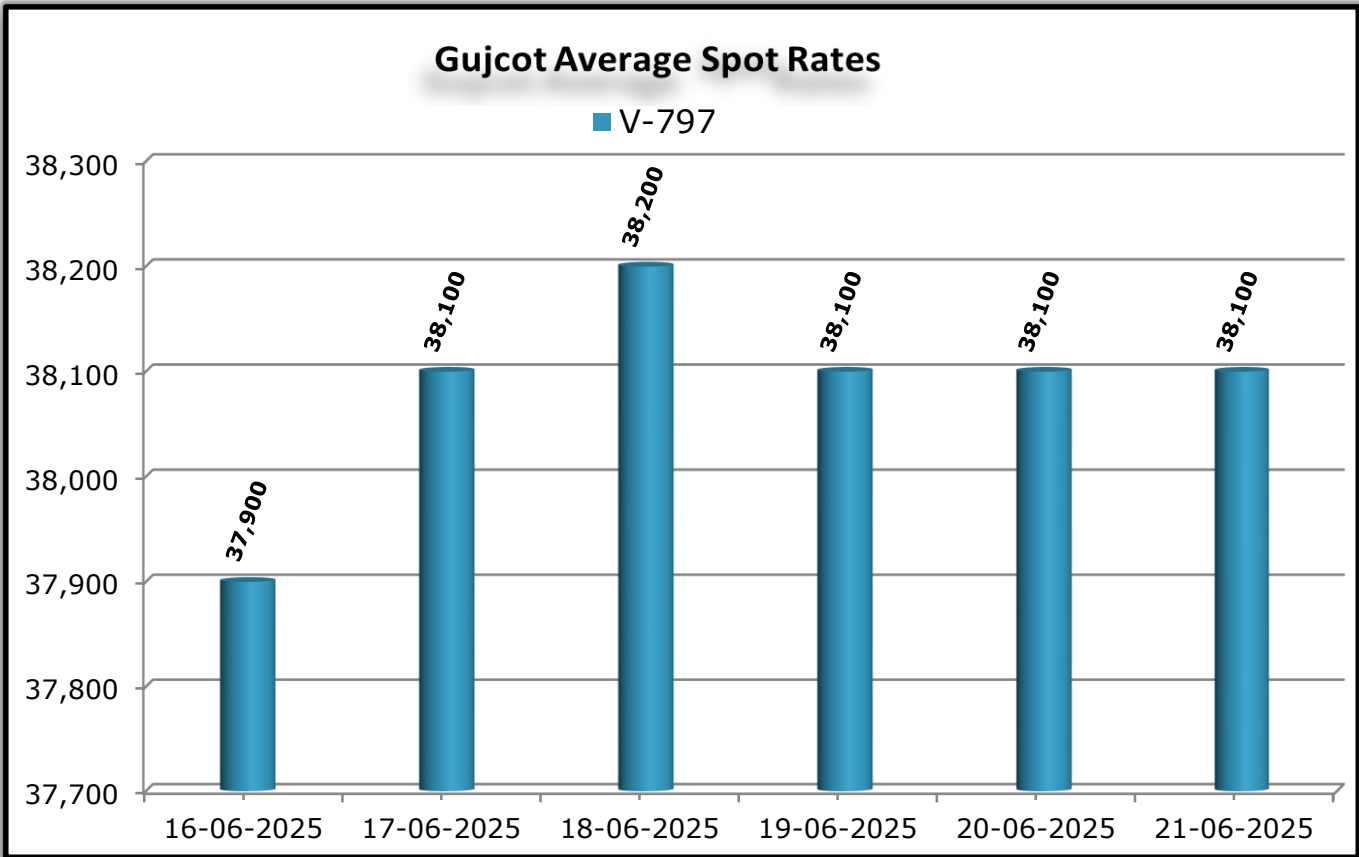
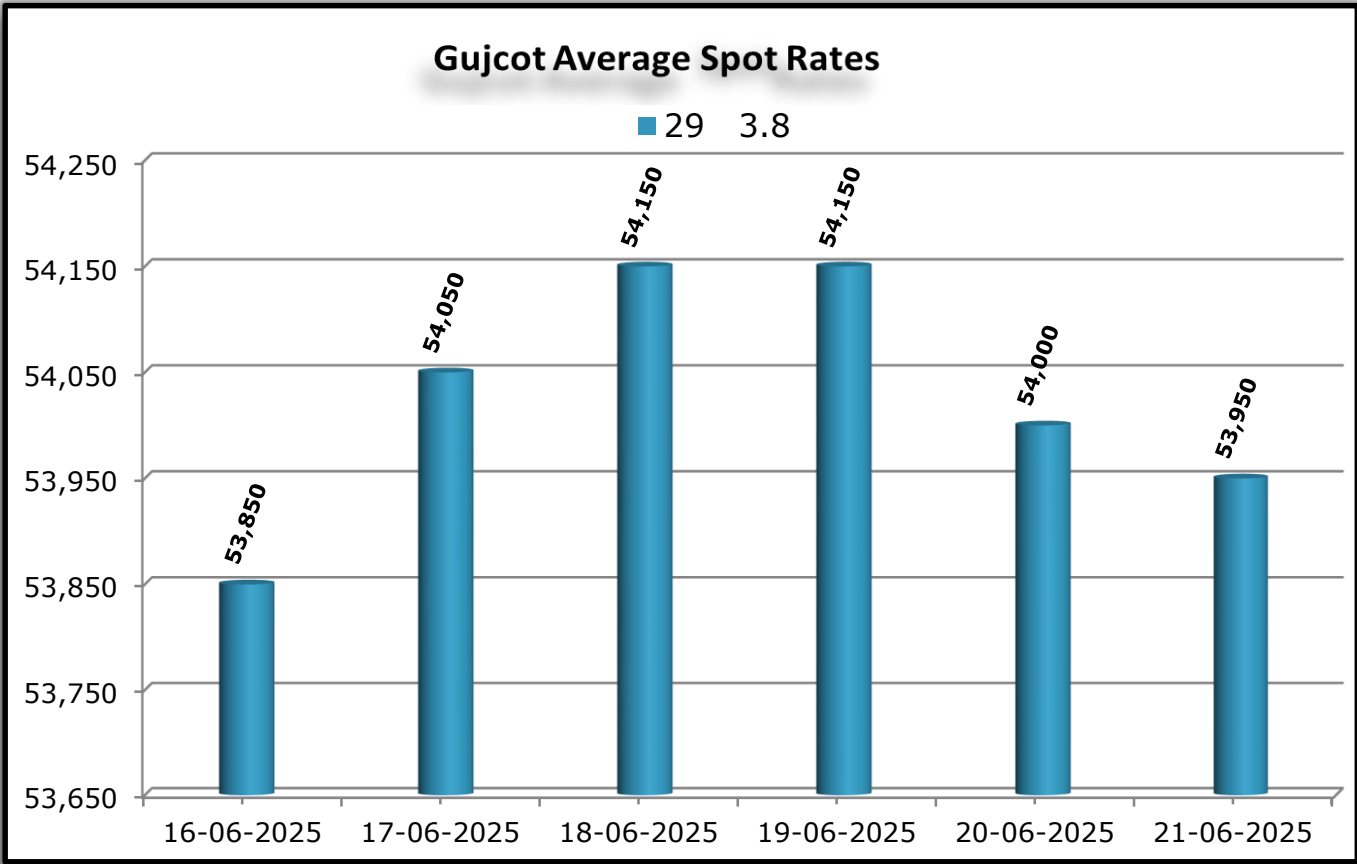
Average Rate of Last week					
Variety	Staple Length	Mic.	Price Range		Average Of 6 Days
			Low	High	
Shankar 6	29	3.8	53,850	54,150	54,025
Shankar 6	28.5	3.7	No Quote	No Quote	No Quote
Shankar 6	28	3.6	No Quote	No Quote	No Quote
Shankar 6	27	3.2	No Quote	No Quote	No Quote
Shankar 6	26	3.0	No Quote	No Quote	No Quote
V-797	13% Trash		37,900	38,200	38,083
MCX Spot Rate			53,980	54,240	54,083
USD Exchange Rate			86.06	86.72	86.44

Rate Of Last Week				
Date	29 3.8	V-797	MCX Spot Rate	USD-INR Exchange
16-06-2025	53,850	37,900	53,980	86.06
17-06-2025	54,050	38,100	54,000	86.24
18-06-2025	54,150	38,200	54,000	86.48
19-06-2025	54,150	38,100	54,040	86.72
20-06-2025	54,000	38,100	54,240	86.58
21-06-2025	53,950	38,100	54,240	86.58



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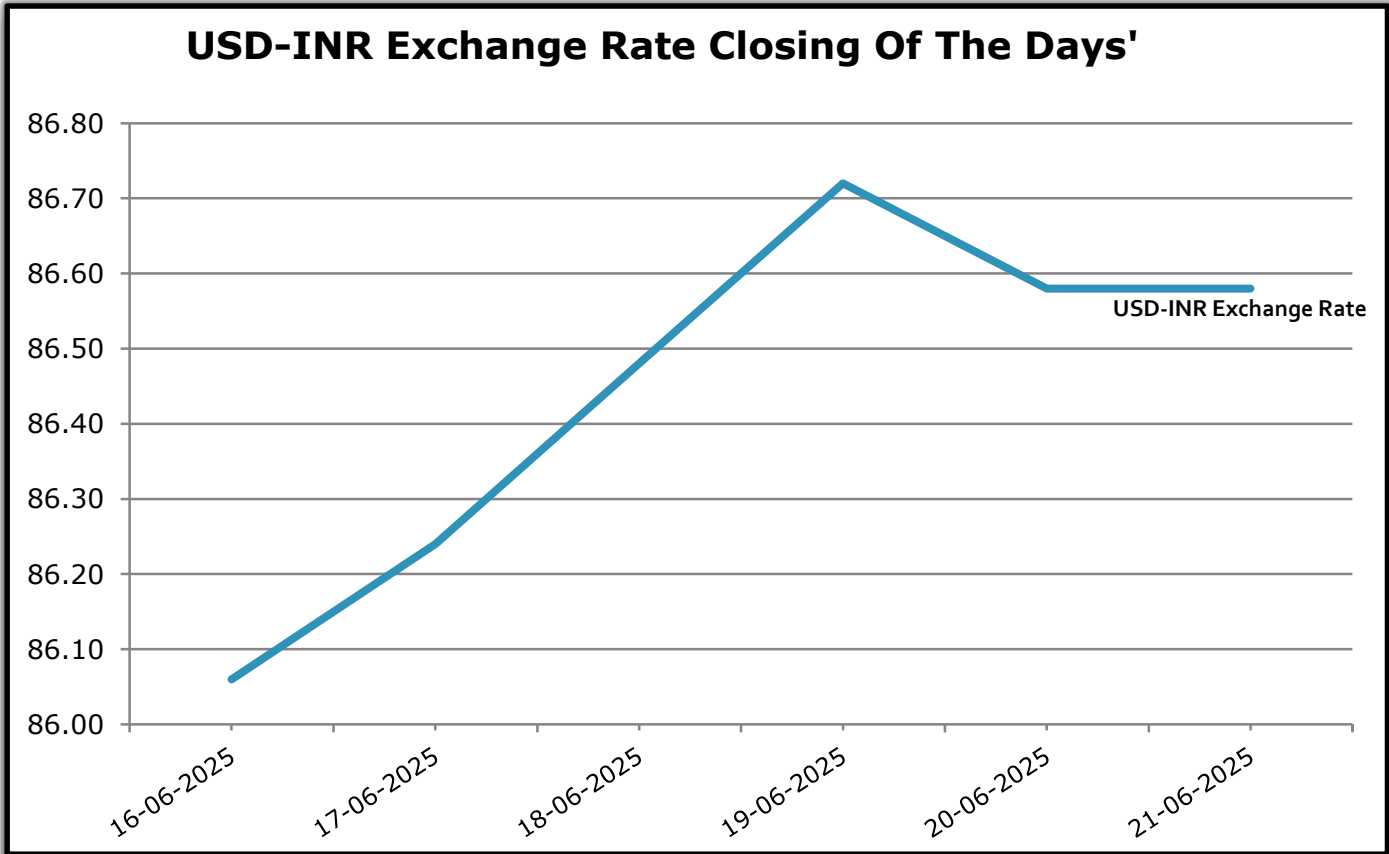
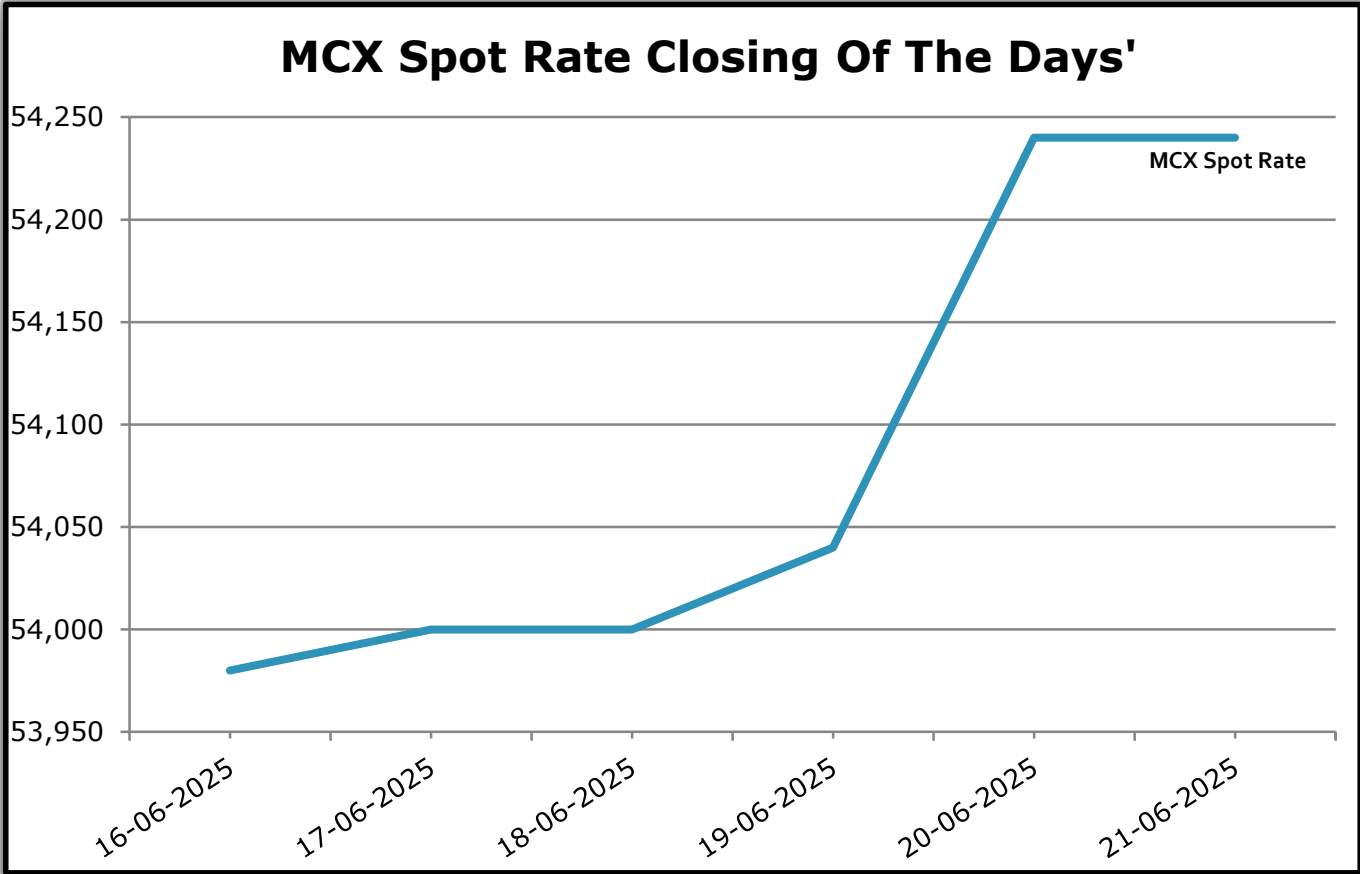
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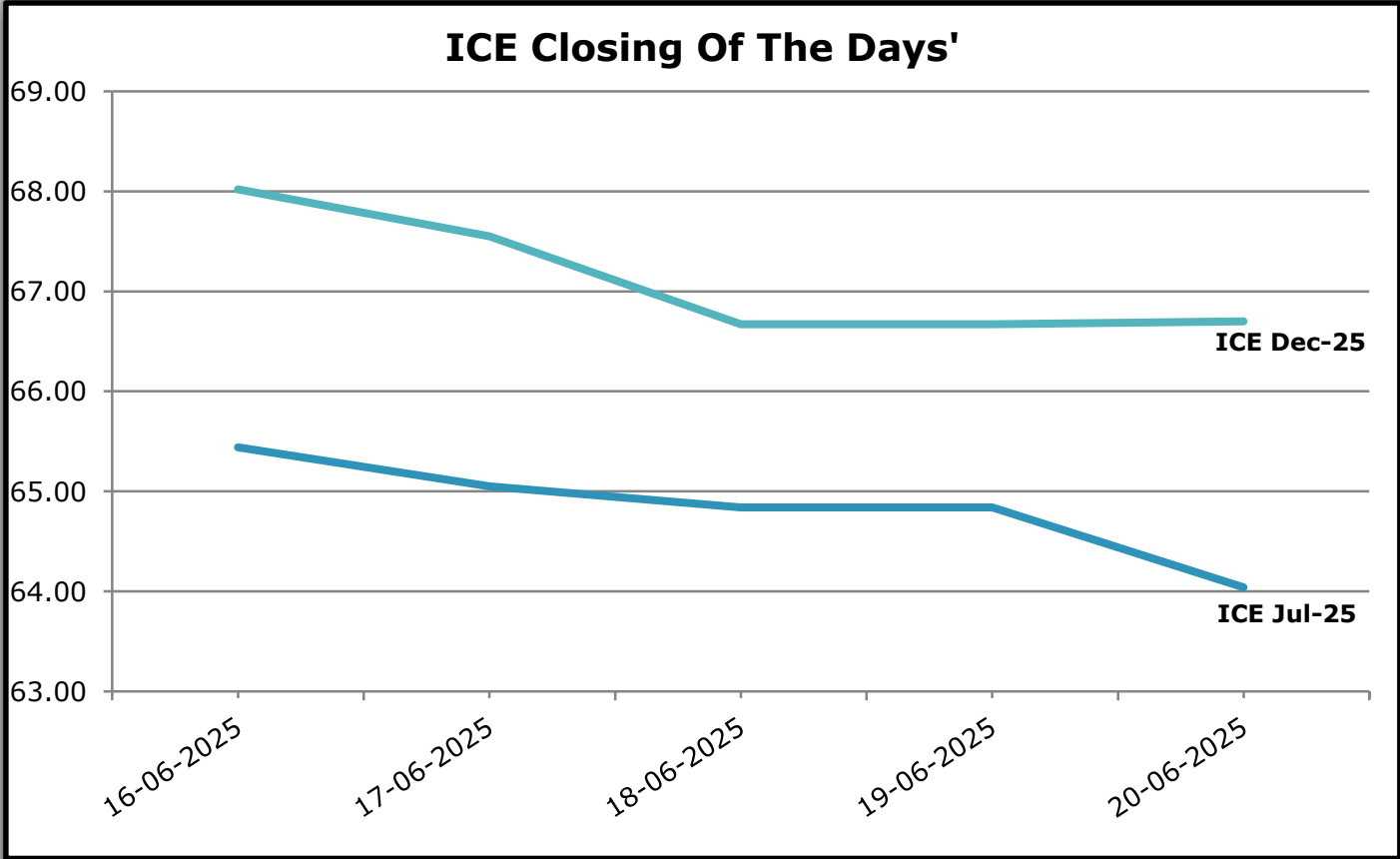
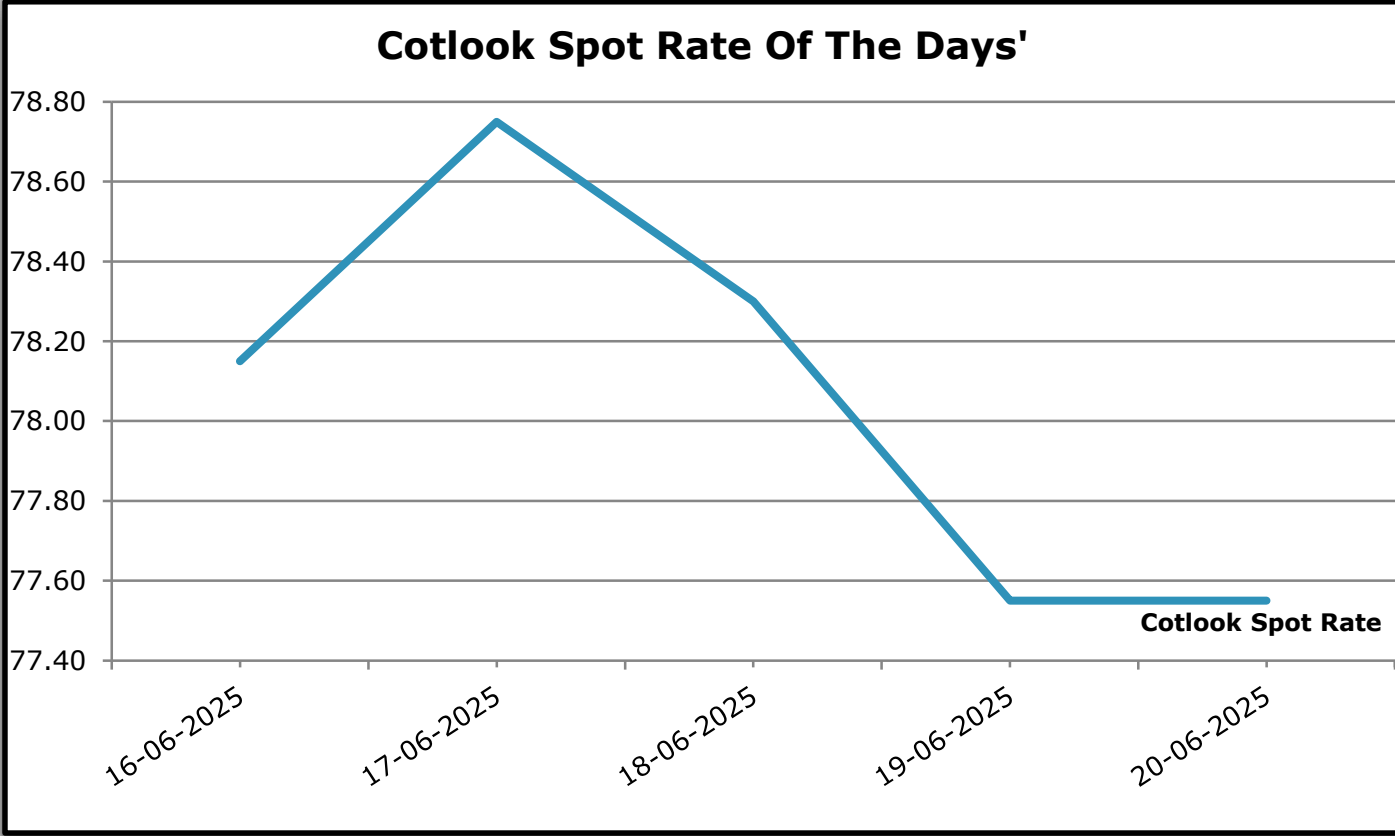


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Foreign Indices			
Date	Cotlook	ICE	
	Spot Rate	Jul-25	Dec-25
16-06-2025	78.15	65.44	68.02
17-06-2025	78.75	65.05	67.55
18-06-2025	78.30	64.84	66.67
19-06-2025	77.55	64.84	66.67
20-06-2025	77.55	64.04	66.70



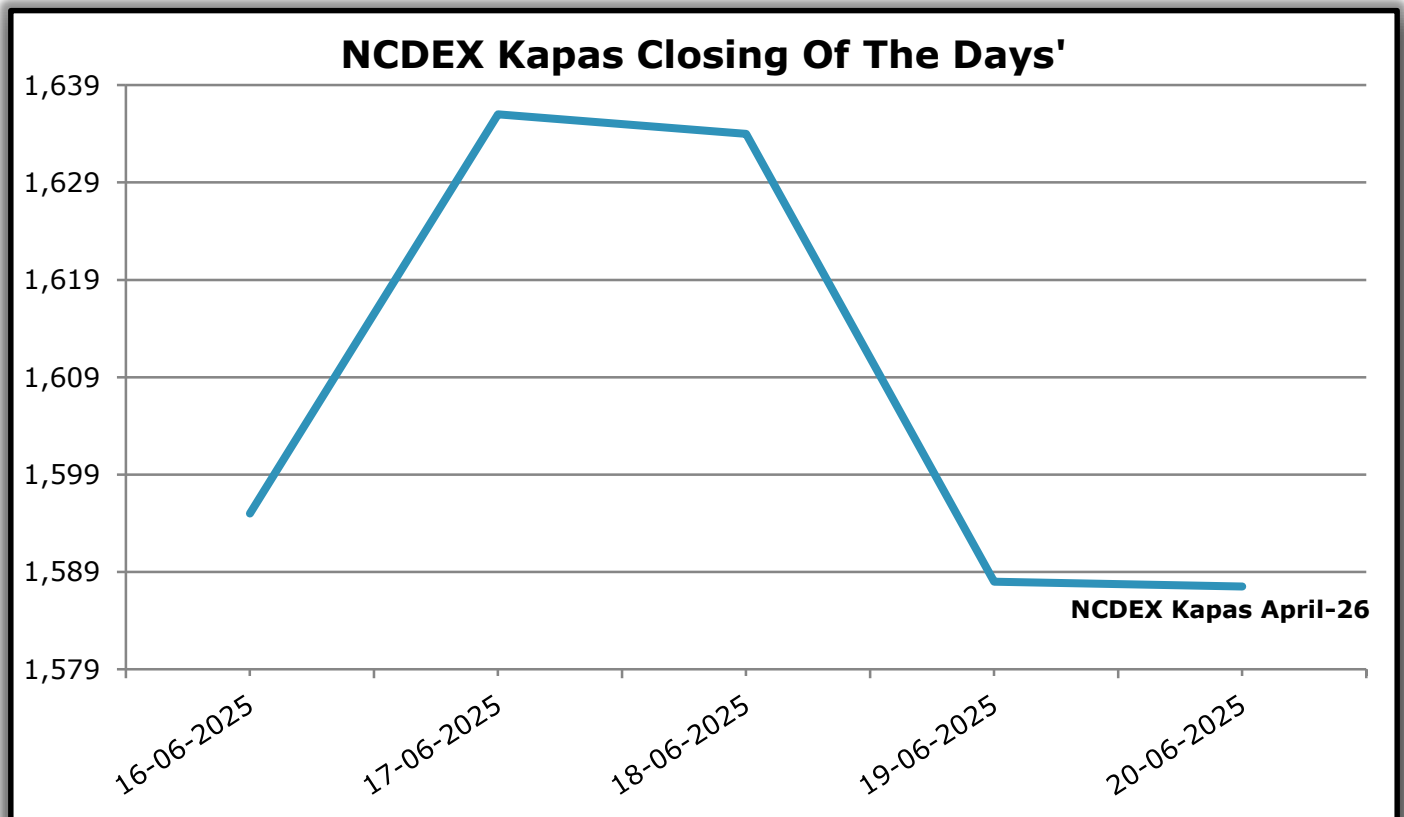


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Indian Indices	
Date	NCDEX Kapas
	April-26
16-06-2025	1,595.00
17-06-2025	1,636.00
18-06-2025	1,634.00
19-06-2025	1,588.00
20-06-2025	1,587.50

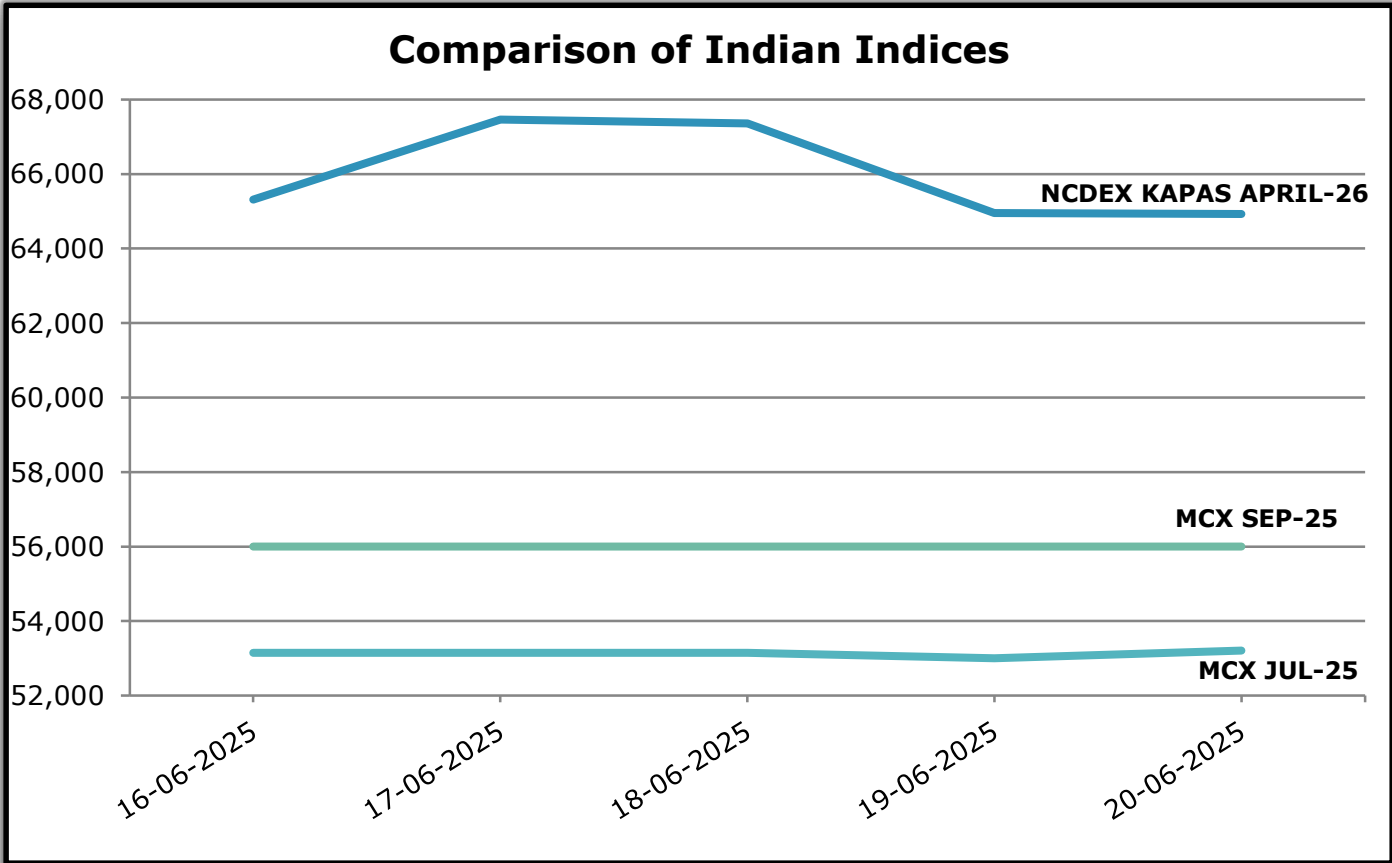




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Indian Indices in Candy Rate			
Date	NCDEX Kapas	MCX	
	April-26	Jul-25	Sep-25
16-06-2025	65,315	53,150	56,000
17-06-2025	67,459	53,150	56,000
18-06-2025	67,355	53,150	56,000
19-06-2025	64,949	53,000	56,000
20-06-2025	64,923	53,210	56,000
Remark :- For NCDEX Kapas we have taken seed rate 600/20 Kg to convert in Candy.			

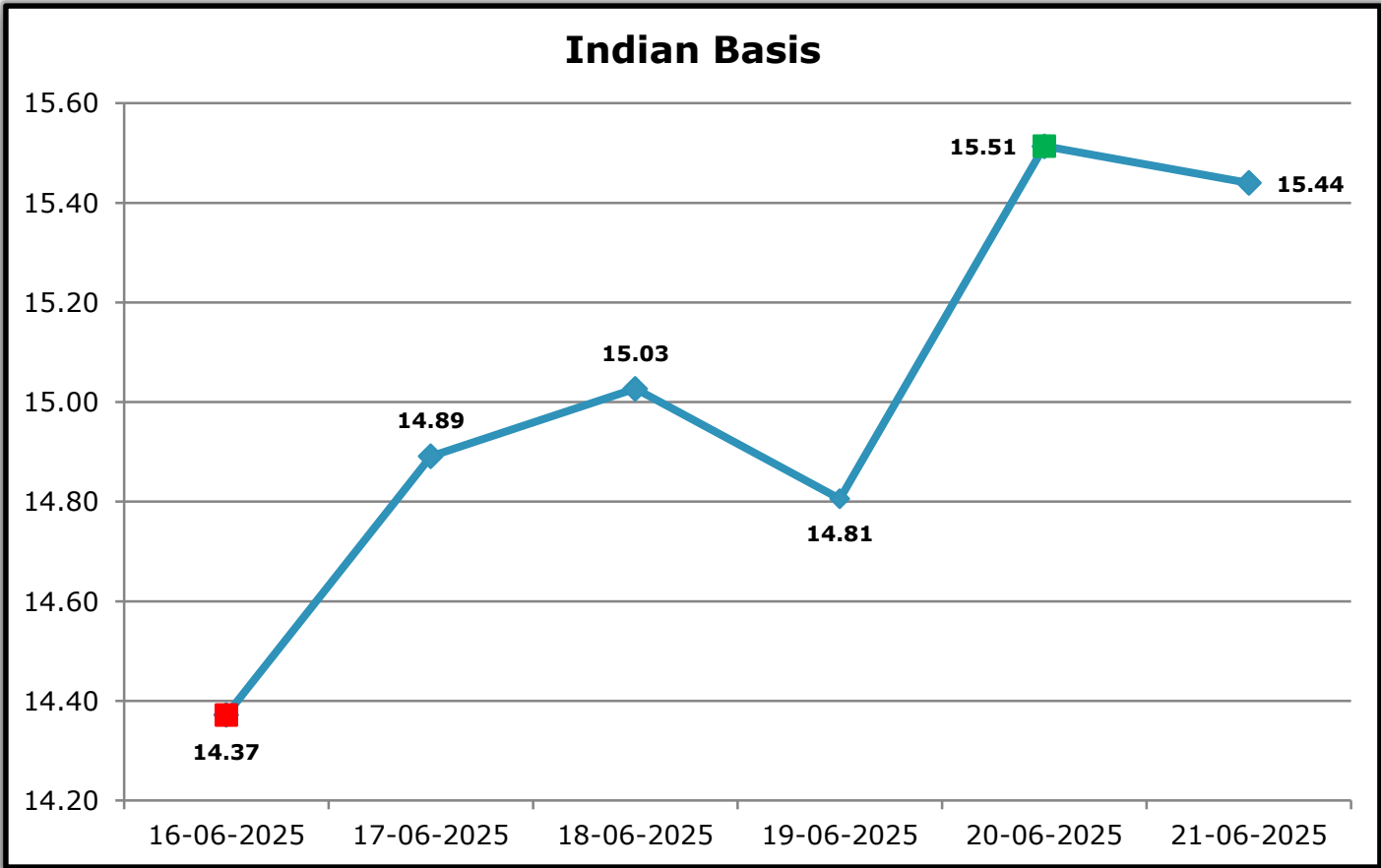




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Indian Basis					
DATE	29 MM	USD-INR	CENTS/LB	ICE Jul	BASIS
16-06-2025	53,850	86.06	79.81	65.44	14.37
17-06-2025	54,050	86.24	79.94	65.05	14.89
18-06-2025	54,150	86.48	79.87	64.84	15.03
19-06-2025	54,150	86.72	79.65	64.84	14.81
20-06-2025	54,000	86.58	79.55	64.04	15.51
21-06-2025	53,950	86.58	79.48	64.04	15.44





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IN THE WEEK AHEAD

- Next week marks a return to a fuller trading schedule, with a packed slate of economic and cotton-specific updates. Key reports include Consumer Confidence, GDP, and Personal Income, which will help shape market sentiment.
- For cotton, traders will be watching the weekly Crop Progress and Export Sales reports, along with the highly anticipated June 30 Acreage Report from USDA. Many in the industry are eager to see if adverse weather across the Cotton Belt led to a planted acreage figure below the current estimate of 9.867 million acres.

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Report prepared by

Kalpesh Patel

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