



# GUJCOT TRADE ASSOCIATION

**WEEKLY REPORT      23-Aug-2025**

## **Market Movement from 18th Aug 2025 to 23rd Aug 2025.**

- NY futures remained largely flat during the week but gained on the last day after remarks by the Fed Chairman about a possible rate cut in the next meeting, which provided a positive outlook for equities and was followed by commodities. Ultimately, the market closed in green, with NY December ending the week with a gain of 47 points W/W.
- U. S. Export Sales and shipments remain weak; however, the season is still ahead, and momentum may pick up after the harvest.
- U.S. Export Sales report for the week ending 14-Aug-2025 showed net upland sales of 1,05,400 bales and upland shipments of 1,23,300 bales for the 2025-26 season, along with net Pima sales of 1,000 bales and shipments of 4,600 bales, bringing total sales to 1,06,400 bales, while no sales were reported for the 2026-27 season.



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- The Gujcot Spot Rate continued to trade under pressure with a steady downward trend. The week opened on Monday at ₹56,800 and eased to ₹56,650 on Tuesday, followed by a further decline to ₹56,350 on Wednesday. Prices slipped again to ₹56,100 on Thursday and dropped to ₹55,950 on Friday, before closing the week at ₹55,950 on Saturday. Overall, the market reflected consistent softness throughout the week amid limited demand and cautious buying.
- The Indian physical market is currently in a downward trend, as CCI has reduced prices by nearly ₹1,100 per candy following the Government of India's relaxation in import duty.
- The monsoon has regained momentum, bringing good rainfall to Maharashtra and South India. At present, the crop condition remains healthy.



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- All-India sowing has reached around 107.870 lakh hectares, of which Gujarat contributes 20.683 lakh hectares, the lowest in the past decade.
- Indian basis is coming down as import duty has been removed until September, ahead of the arrival of imported cotton.
- During this week, the Indian basis remained between 13.52 and 15.54.
- This week, the USD-INR exchange rate showed moderate fluctuations, opening at 87.35 on Monday, easing to 86.95 on Tuesday, and slightly recovering to 87.06 on Wednesday. The currency strengthened further to 87.27 on Thursday before closing the week higher at 87.53 on Friday, marking an overall upward bias with the rupee weakening against the dollar.
- **Hope for best**



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### Gujarat District wise Cotton Sowing

| Gujarat Districtwise Cotton Sowing<br>Till 18-August-2025                                   |         |                 |        |
|---|---------|-----------------|--------|
| Kutch   | 770     | Saurashtra      | 14,853 |
| Kutch   | 770     | Surendranagar   | 3,825  |
|   |         | Rajkot          | 1,293  |
| North Gujarat   | 1,611   | Jamnagar        | 874    |
| Banarsakantha   | 191     | Porbandar       | 41     |
| Patan   | 357     | Junagadh        | 302    |
| Mehsana   | 278     | Amreli          | 2,663  |
| Sabarkantha   | 422     | Bhavnagar       | 2,089  |
| Gandhinagar   | 173     | Morbi           | 2,078  |
| Aravali   | 189     | Botad           | 1,525  |
|   |         | Gir Somnath     | 114    |
| Middle Gujarat  | 1,956   | Devbhumi Dwarka | 50     |
| Ahmedabad   | 397     |                 |        |
| Anand   | 4       | South Gujarat   | 1,493  |
| Kheda   | 167     | Surat           | 22     |
| Panchmahal  | 86      | Narmada         | 483    |
| Dahod   | 7       | Bharuch         | 880    |
| Vadodara  | 429     | Dang            | 0      |
| Mahisagar   | 85      | Navsari         | 0      |
| Chota Udaipur   | 781     | Valsad          | 0      |
|   |         | Tapi            | 108    |
| TOTAL   |         |                 | 20,683 |
| TOTAL (Last Year)   |         |                 | 23,580 |
| SUMMARY   |         |                 |        |
| Zone  | 2025-26 | 2024-25         | Change |
| Kutch   | 770     | 730             | 40     |
| North Gujarat   | 1,611   | 1,921           | -310   |
| Middle Gujarat  | 1,956   | 2,800           | -844   |
| Saurashtra  | 14,853  | 16,584          | -1,731 |
| South Gujarat   | 1,493   | 1,545           | -52    |
| TOTAL   | 20,683  | 23,580          | -2,897 |
| All Figures in '00 Hectares   |         |                 |        |
| Source :- Agriculture, Farmers Welfare and Co-operation Department<br>Government of Gujarat |         |                 |        |



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WEEKLY REPORT 23-Aug-2025

## All India Cotton Sowing

| All India Cotton Sowing |                        |                |               |               |
|-------------------------|------------------------|----------------|---------------|---------------|
| As on 23-08-2025        |                        |                |               |               |
| 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%        |
| <b>North India</b>      | <b>11.486</b>          | <b>10.892</b>  | <b>0.594</b>  | <b>5.45%</b>  |
| Gujarat                 | 20.683                 | 23.580         | -2.897        | -12.29%       |
| Maharashtra             | 37.349                 | 40.784         | -3.435        | -8.42%        |
| Madhya Pradesh          | 5.700                  | 6.149          | -0.449        | -7.30%        |
| <b>Central India</b>    | <b>63.732</b>          | <b>70.513</b>  | <b>-6.781</b> | <b>-9.62%</b> |
| Telangana               | 18.179                 | 17.090         | 1.089         | 6.37%         |
| Andra Pradesh           | 3.680                  | 3.500          | 0.180         | 5.14%         |
| Karnataka               | 7.499                  | 6.690          | 0.809         | 12.09%        |
| <b>South Zone</b>       | <b>29.358</b>          | <b>27.280</b>  | <b>2.078</b>  | <b>7.62%</b>  |
| Tamil Nadu              | 3.294                  | 2.701          | 0.593         | 21.95%        |
| Orissa                  |                        |                |               |               |
| Others                  |                        |                |               |               |
| <b>All India</b>        | <b>107.870</b>         | <b>111.386</b> | <b>-3.516</b> | <b>-3.16%</b> |





# GUJCOT TRADE ASSOCIATION

## WEEKLY REPORT

23-Aug-2025

### Global

#### US Weekly Export Sales

- Net sales of UPLAND totaling 1,05,400 RB for 2025-2026 primarily for Vietnam (35,800 RB, including 400 RB switched from South Korea and decreases of 11,700 RB), Pakistan (28,100 RB, including decreases of 1,200 RB), Bangladesh (21,300 RB, including 2,600 RB switched from Pakistan and decreases of 4,500 RB), Peru (8,400 RB, including decreases of 600 RB), and India (7,300 RB), were offset by reductions for Turkey (12,600 RB), South Korea (400 RB), and Malaysia (300 RB).
- UPLAND Exports of 1,23,300 RB were primarily to Vietnam (31,100 RB), Bangladesh (18,500 RB), Pakistan (12,200 RB), Mexico (9,600 RB), and Honduras (9,500 RB).
- Net sales of PIMA totaling 1,000 RB for 2025-2026 were primarily for India (800 RB, including decreases of 1,900 RB) and Thailand (200 RB).
- PIMA Exports of 4,600 RB were primarily to India (2,900 RB), Egypt (700 RB), Thailand (400 RB), Bangladesh (300 RB), and Vietnam (200 RB).

| US Export Sales                | 14-Aug-2025     |
|--------------------------------|-----------------|
| Marketing Year 2025-26         |                 |
| Upland Gross Sales             | 1,38,800        |
| Cancellation                   | 33,400          |
| <b>Net Upland Sales</b>        | <b>1,05,400</b> |
| PIMA Gross Sales               | 2,900           |
| Cancellation                   | 1,900           |
| <b>Net PIMA Sales</b>          | <b>1,000</b>    |
| Total Gross Sales              | 1,41,700        |
| Total Cancellation             | 35,300          |
| <b>Total Net Sales</b>         | <b>1,06,400</b> |
| Shipments                      |                 |
| UPLAND                         | 1,23,300        |
| PIMA                           | 4,600           |
| <b>Total Shipment</b>          | <b>1,27,900</b> |
| Marketing Year 2026-27         |                 |
| Net Upland Sales               | 0               |
| Net PIMA Sales                 | 0               |
| <b>Total Net Sales</b>         | <b>0</b>        |
| All Figures in US Running Bale |                 |



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## WEEKLY REPORT      23-Aug-2025

| Gujarat Spot Rate Weekly Changes |               |      |            |            |        |                  |
|----------------------------------|---------------|------|------------|------------|--------|------------------|
| Variety                          | Staple Length | Mic. | 16-08-2025 | 23-08-2025 | Change | Change (in Per.) |
|                                  |               |      |            |            | W/W    | W/W              |
| Shankar 6                        | 29mm          | 3.8  | 56,950     | 55,950     | -1,000 | -1.79%           |
| V-797                            | 13% Trash     |      | 39,100     | 38,550     | -550   | -1.43%           |
| MCX Spot Rate                    |               |      | 56,920     | 56,040     | -880   | -1.57%           |
| USD-INR Exchange                 |               |      | 87.55      | 87.53      | -0.02  | -0.02%           |

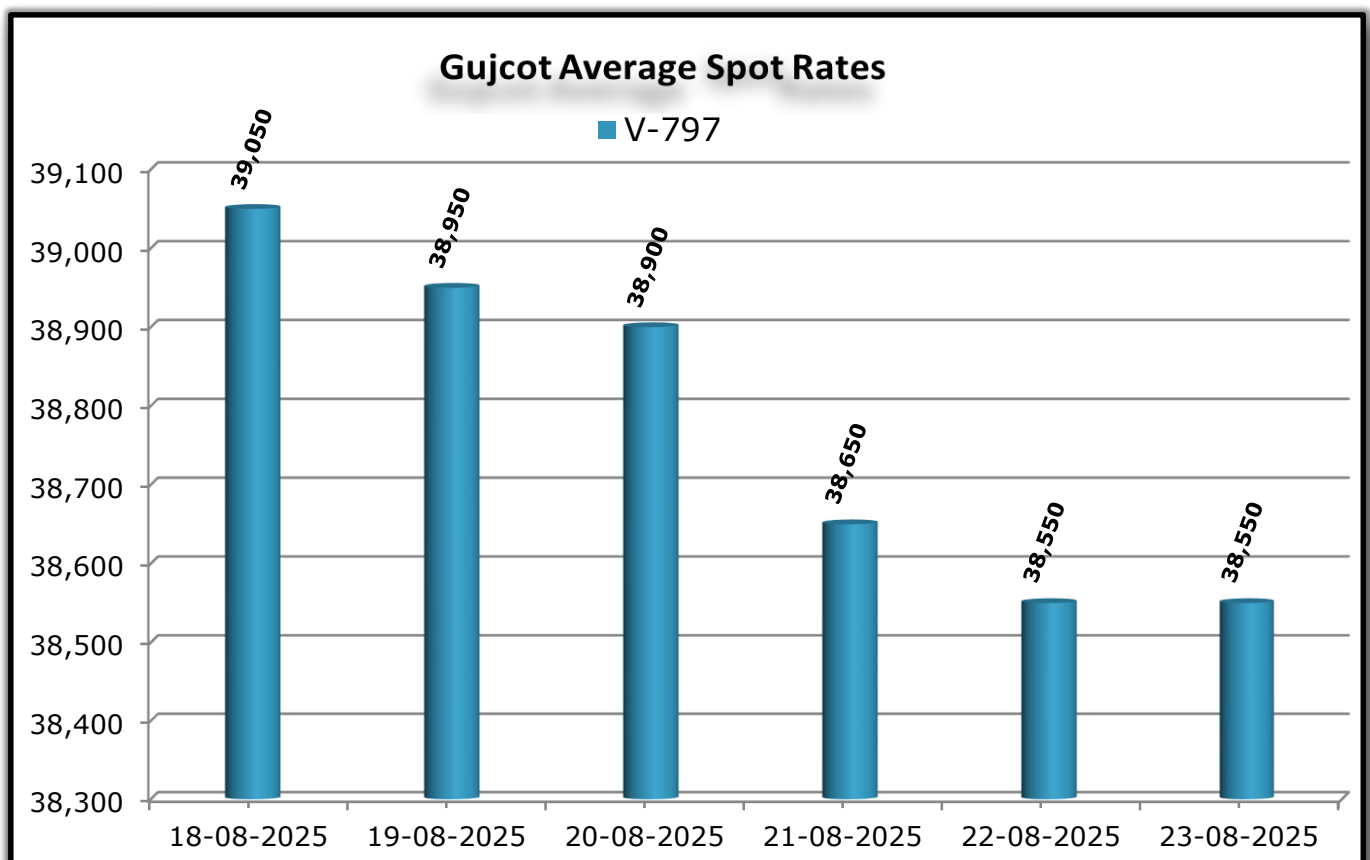
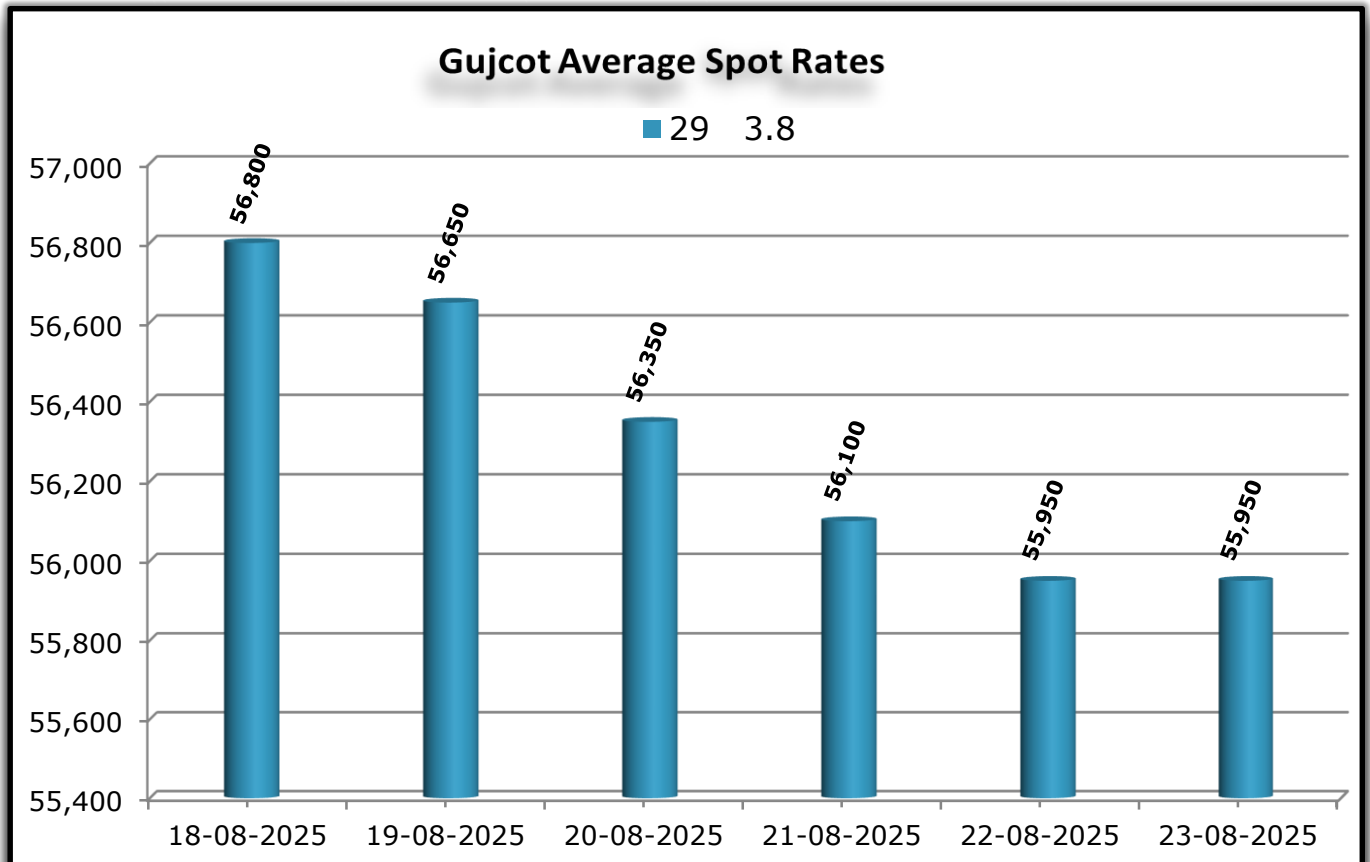
| Average Rate of Last week |               |      |             |          |                   |
|---------------------------|---------------|------|-------------|----------|-------------------|
| Variety                   | Staple Length | Mic. | Price Range |          | Average Of 6 Days |
|                           |               |      | Low         | High     |                   |
| Shankar 6                 | 29            | 3.8  | 55,950      | 56,800   | 56,300            |
| 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     |      | 38,550      | 39,050   | 38,775            |
|                           |               |      |             |          |                   |
| MCX Spot Rate             |               |      | 56,040      | 56,840   | 56,400            |
| USD Exchange Rate         |               |      | 86.95       | 87.53    | 87.28             |

| Rate Of Last Week |        |        |               |                  |
|-------------------|--------|--------|---------------|------------------|
| Date              | 29 3.8 | V-797  | MCX Spot Rate | USD-INR Exchange |
| 18-08-2025        | 56,800 | 39,050 | 56,840        | 87.35            |
| 19-08-2025        | 56,650 | 38,950 | 56,660        | 86.95            |
| 20-08-2025        | 56,350 | 38,900 | 56,460        | 87.06            |
| 21-08-2025        | 56,100 | 38,650 | 56,360        | 87.27            |
| 22-08-2025        | 55,950 | 38,550 | 56,040        | 87.53            |
| 23-08-2025        | 55,950 | 38,550 | 56,040        | 87.53            |



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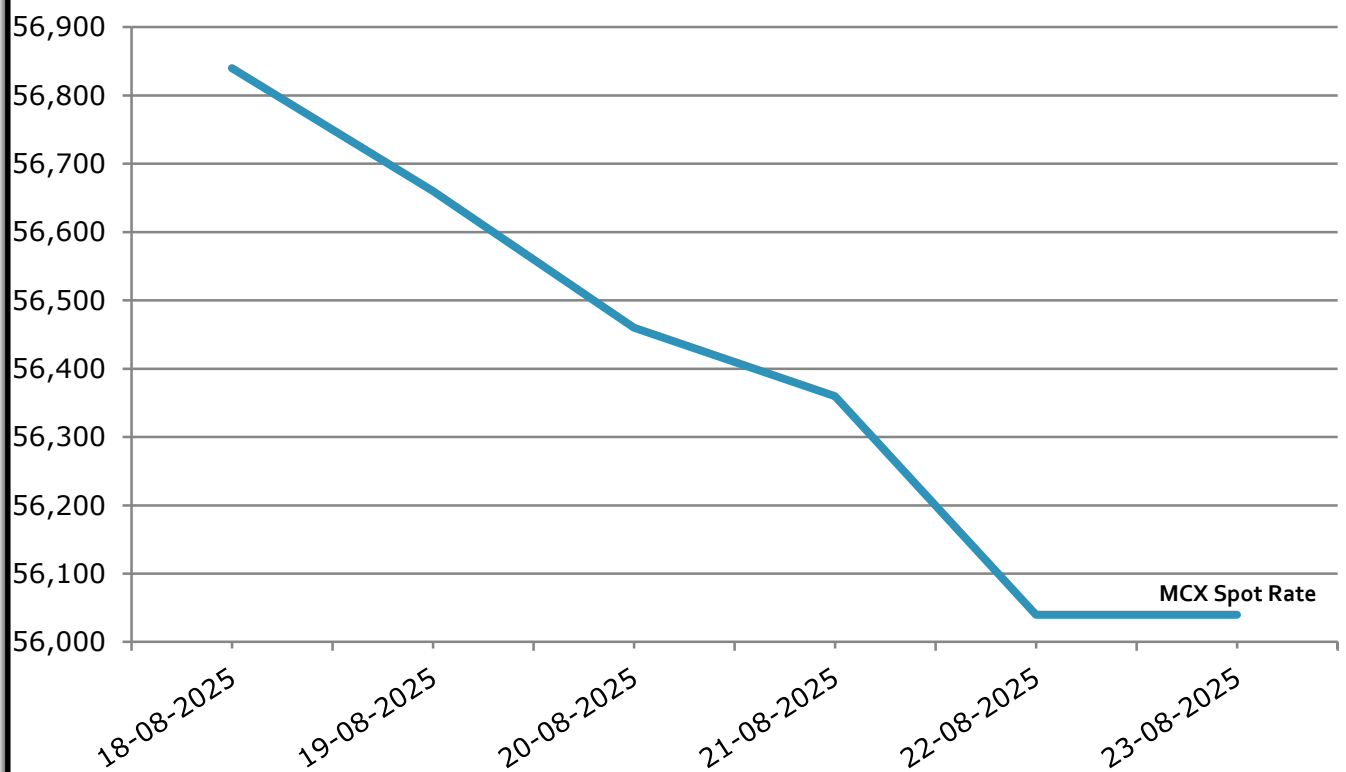




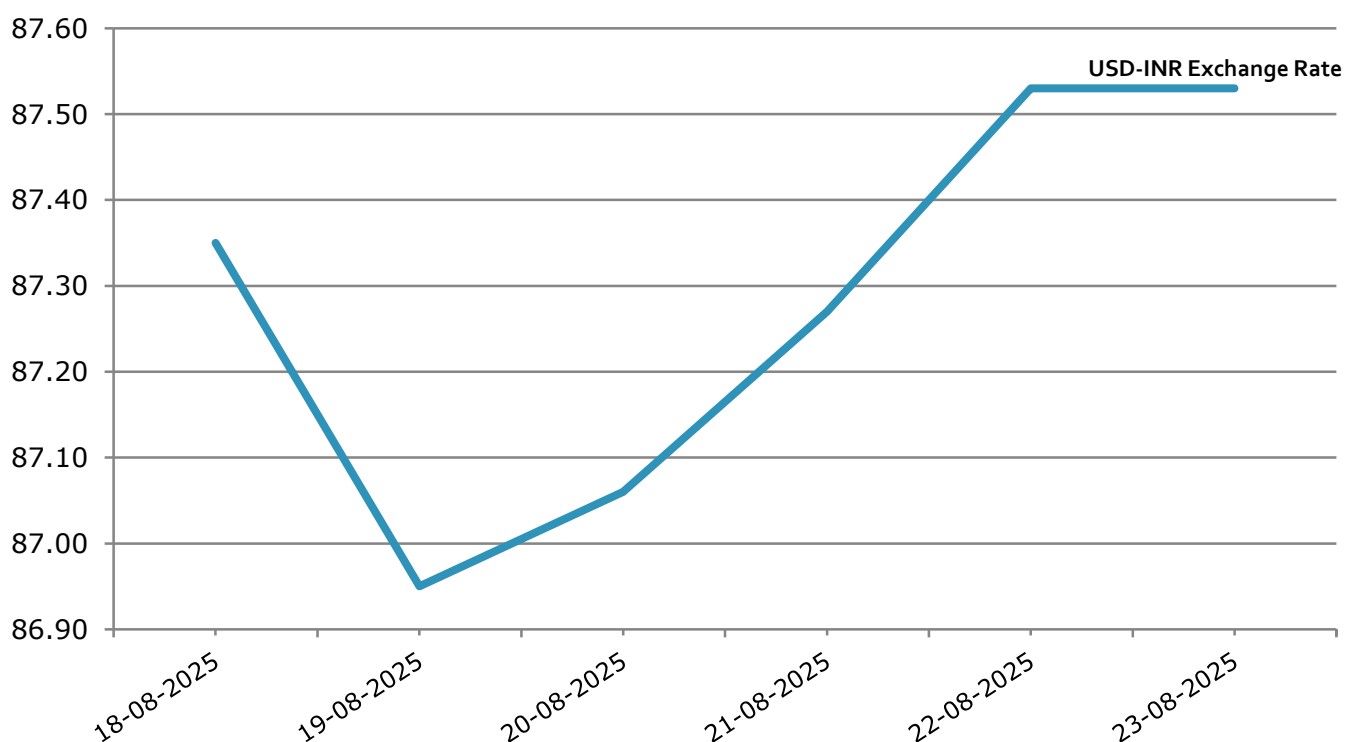
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### MCX Spot Rate Closing Of The Days'



### USD-INR Exchange Rate Closing Of The Days'



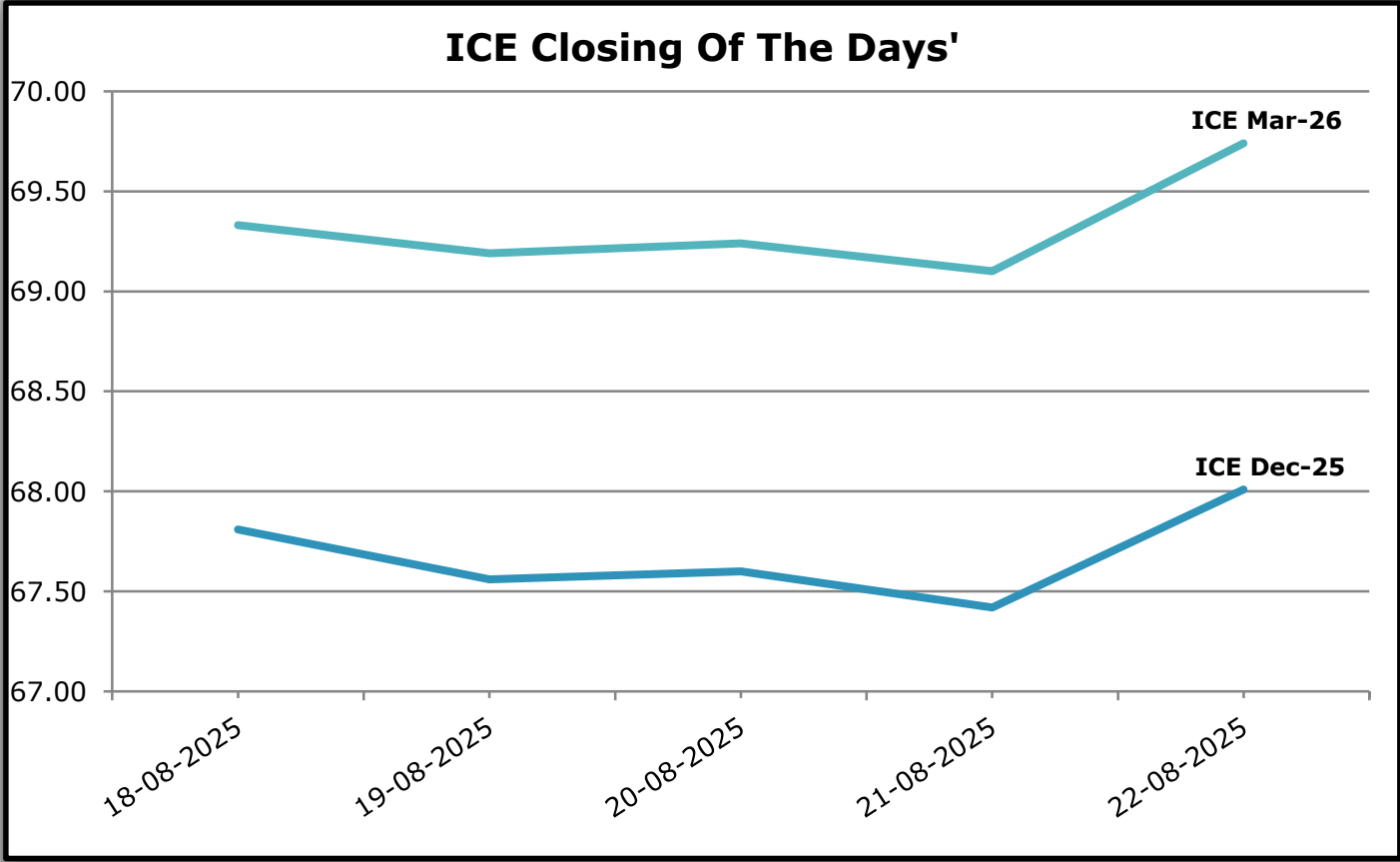
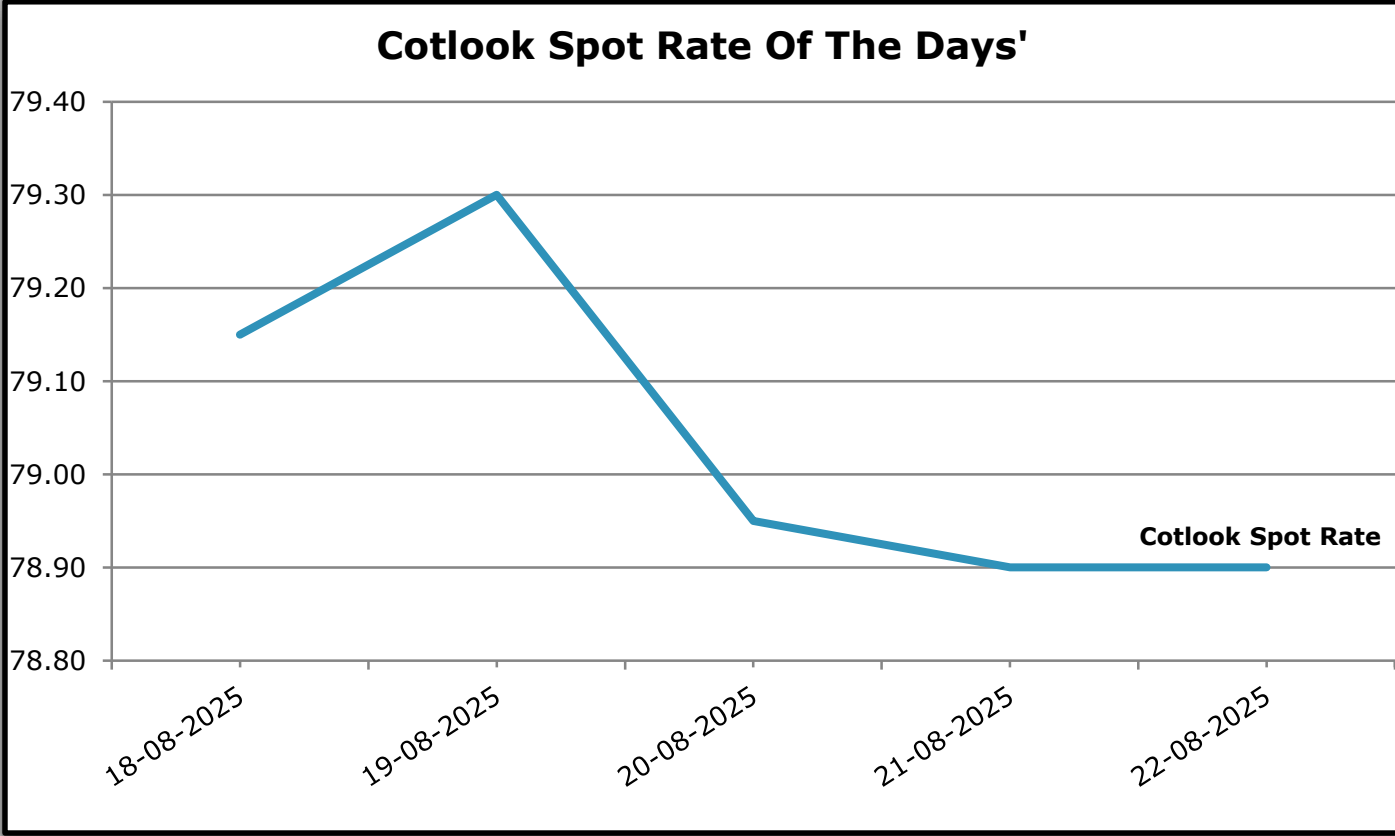


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## WEEKLY REPORT

### 23-Aug-2025

| Foreign Indices |           |        |        |
|-----------------|-----------|--------|--------|
| Date            | Cotlook   | ICE    |        |
|                 | Spot Rate | Dec-25 | Mar-26 |
| 18-08-2025      | 79.15     | 67.81  | 69.33  |
| 19-08-2025      | 79.30     | 67.56  | 69.19  |
| 20-08-2025      | 78.95     | 67.60  | 69.24  |
| 21-08-2025      | 78.90     | 67.42  | 69.10  |
| 22-08-2025      | 78.90     | 68.01  | 69.74  |



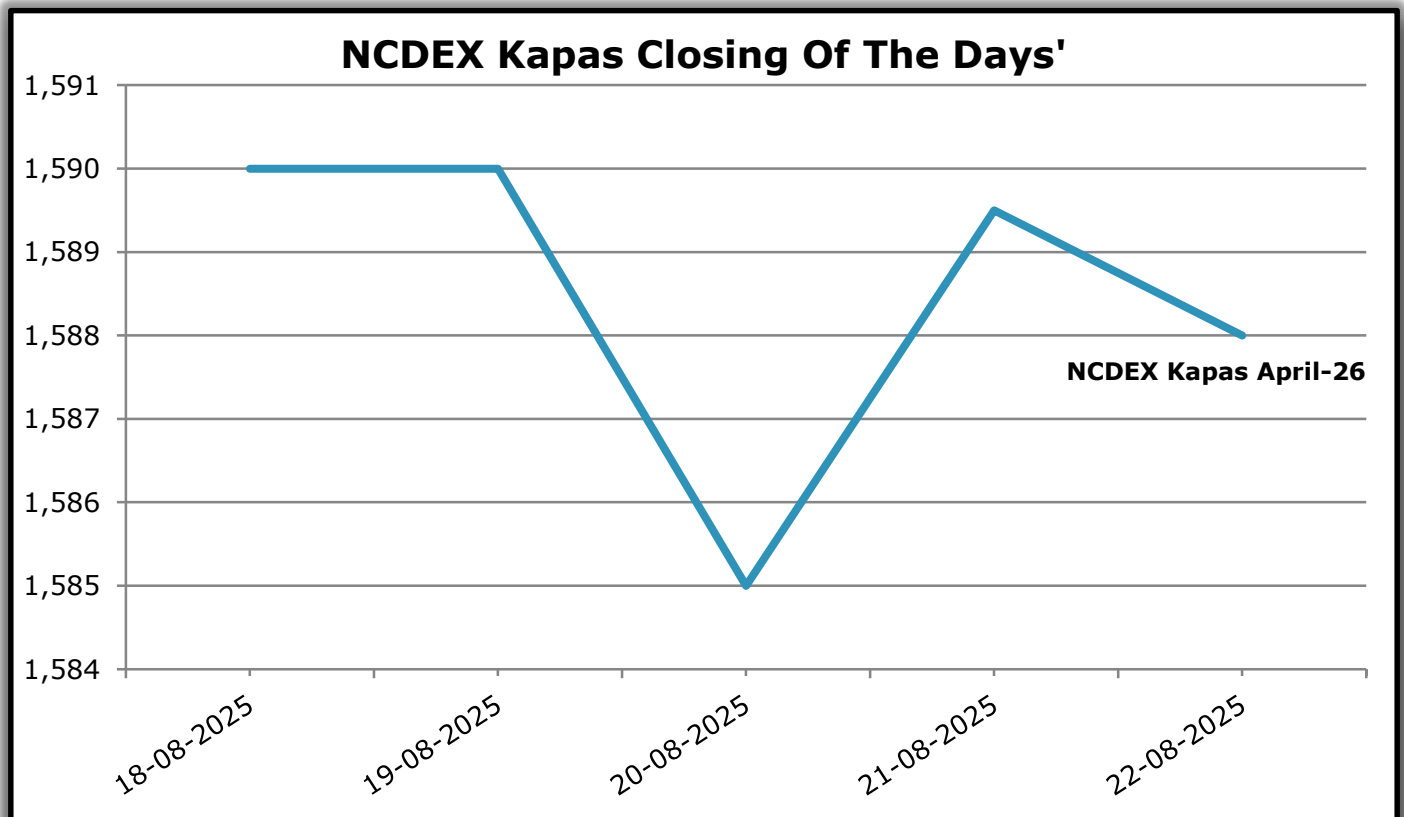


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| Indian Indices |             |
|----------------|-------------|
| Date           | NCDEX Kapas |
|                | April-26    |
| 18-08-2025     | 1,590.00    |
| 19-08-2025     | 1,590.00    |
| 20-08-2025     | 1,585.00    |
| 21-08-2025     | 1,589.50    |
| 22-08-2025     | 1,588.00    |

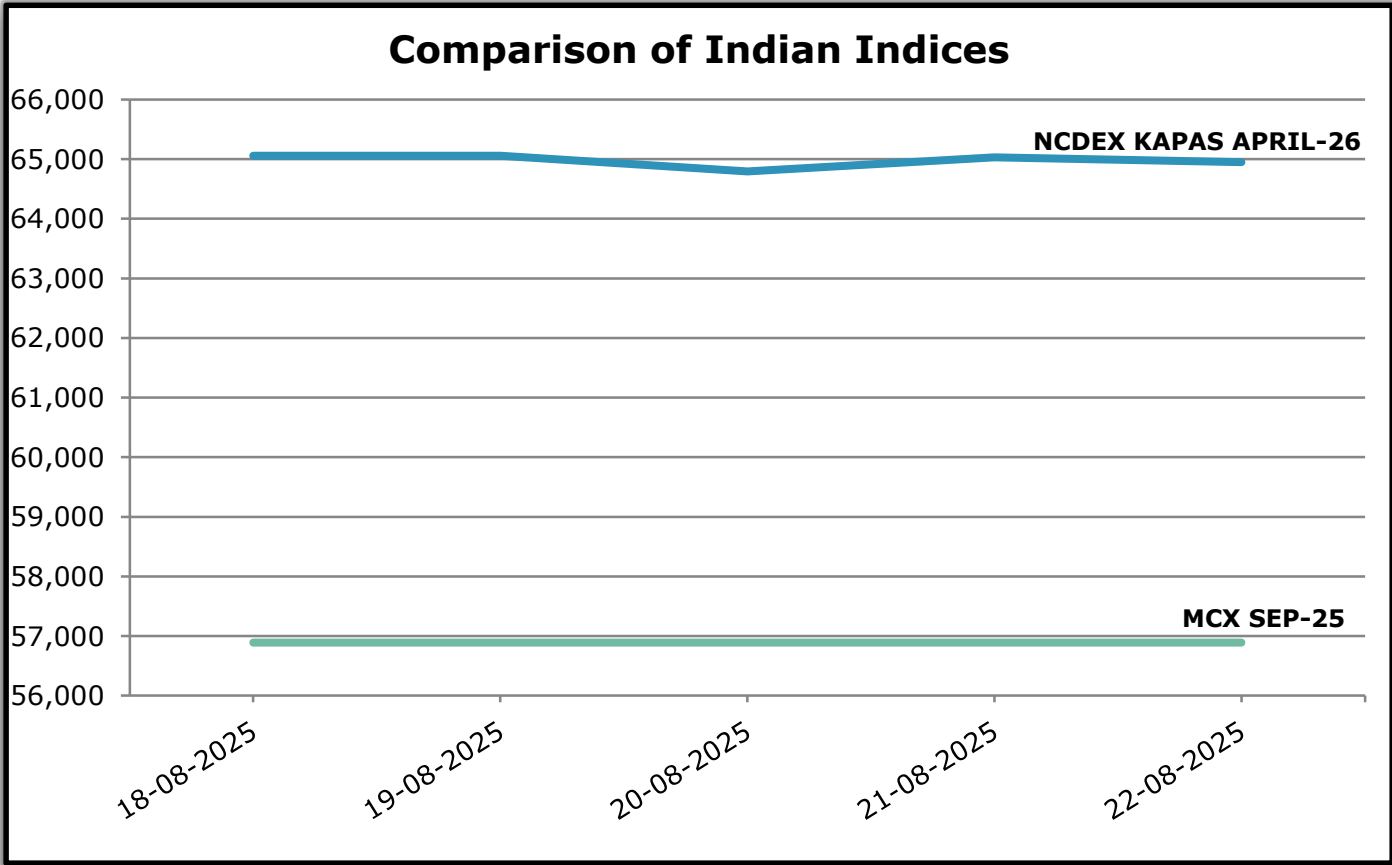




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| Indian Indices in Candy Rate   |             |        |
|--|-------------|--------|
| Date   | NCDEX Kapas | MCX    |
|  | April-26    | Sep-25 |
| 18-08-2025   | 65,054      | 56,890 |
| 19-08-2025   | 65,054      | 56,890 |
| 20-08-2025   | 64,792      | 56,890 |
| 21-08-2025   | 65,028      | 56,890 |
| 22-08-2025   | 64,949      | 56,890 |
| Remark :- For NCDEX Kapas we have taken seed rate 600/20 Kg to convert in Candy. |             |        |

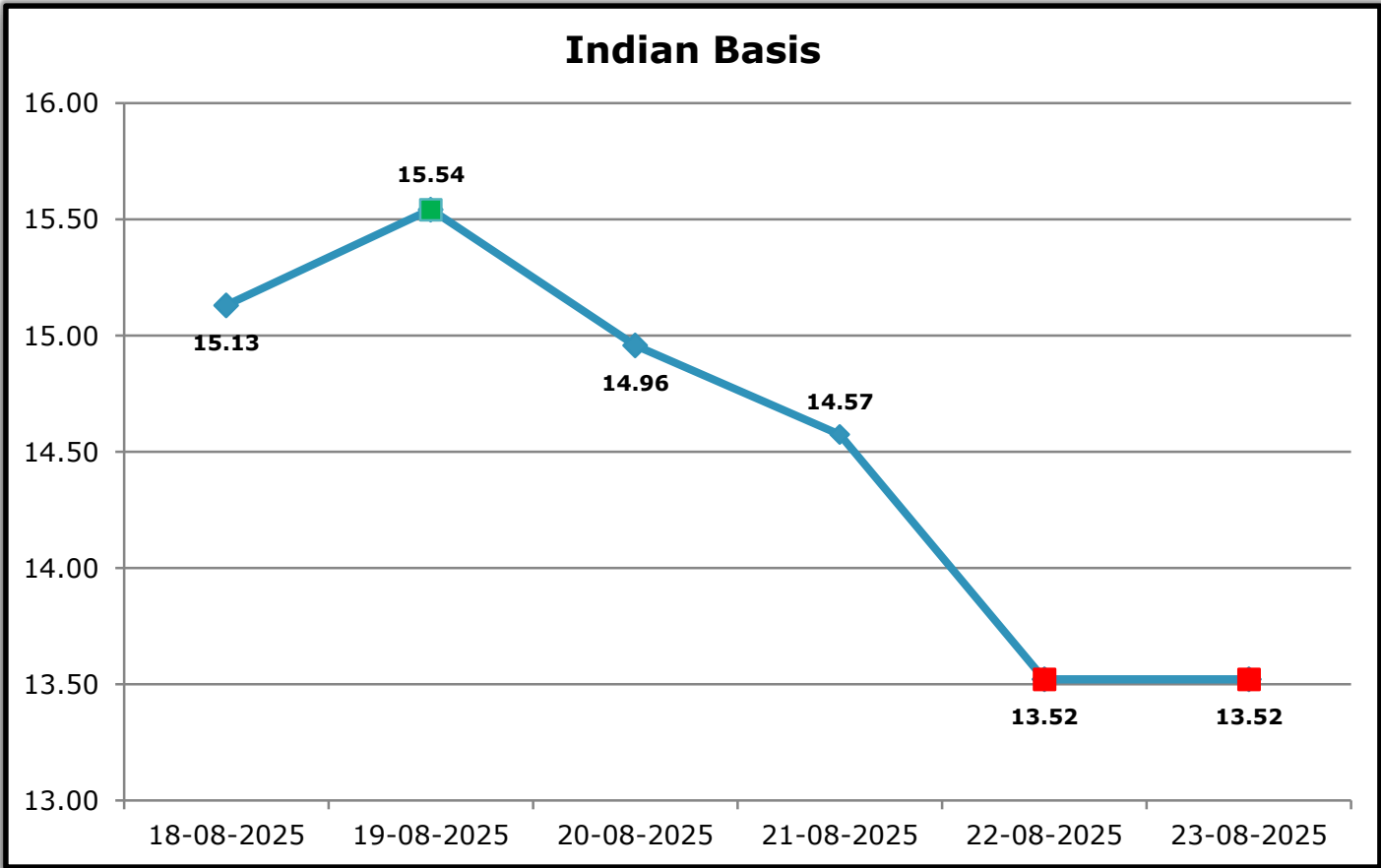




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| Indian Basis |        |         |          |         |       |
|--------------|--------|---------|----------|---------|-------|
| DATE         | 29 MM  | USD-INR | CENTS/LB | ICE Dec | BASIS |
| 18-08-2025   | 56,800 | 87.35   | 82.94    | 67.81   | 15.13 |
| 19-08-2025   | 56,650 | 86.95   | 83.10    | 67.56   | 15.54 |
| 20-08-2025   | 56,350 | 87.06   | 82.56    | 67.60   | 14.96 |
| 21-08-2025   | 56,100 | 87.27   | 81.99    | 67.42   | 14.57 |
| 22-08-2025   | 55,950 | 87.53   | 81.53    | 68.01   | 13.52 |
| 23-08-2025   | 55,950 | 87.53   | 81.53    | 68.01   | 13.52 |





# GUJCOT TRADE ASSOCIATION

## WEEKLY REPORT

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### IN THE WEEK AHEAD

- In the coming week, the market will closely watch key U.S. reports. On **Thursday, August 28**, the USDA will release its **Weekly Export Sales Report** (week ended August 21) at **8:30 am EST**, followed later in the day by the **CFTC Cotton On-Call Report** (week ended August 22) at **3:30 pm EST**. On **Friday, August 29**, attention will turn to the **CFTC Commitment of Traders Report** (week ended August 26), scheduled at **3:30 pm EST**.

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