



**COTTON  
ASSOCIATION  
OF INDIA**

*Established 1921*

ISO 9001:2015

# **COTTON ASSOCIATION OF INDIA**

**MONTHLY REPORT**

**JUNE 2023**

**ALL INDIA ARRIVALS**

**STATEWISE CROP ESTIMATES**

**INDIAN COTTON BALANCE SHEET**



# COTTON ASSOCIATION OF INDIA

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## PRESS RELEASE

**CAI HELD ALL INDIA MEETING OF ITS NATIONAL CROP COMMITTEE WITH STAKEHOLDERS ON 10TH JULY 2023 IN MUMBAI TO ARRIVE AT ACCURATE CROP/PRESSING ESTIMATE FOR 2022-23 SEASON AND TO DRAW A COTTON BALANCE SHEET**

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As notified previously, Cotton Association of India convened an All India meeting of its National Crop Committee with all stakeholders viz., all eleven upcountry cotton growing state associations, MNCs, mill-members, exporters, importers, etc. in Mumbai on Monday, the 10th July 2023. The purpose of this meeting was dwell on the current cotton scenario, exchange information and ideas and arrive at an accurate crop estimate for the ongoing crop year 2022-23, draw a cotton balance sheet based on the input received from all stakeholders and to reconcile differing crop estimates of various agencies.

The meeting was attended by 55 members including CAI Crop Committee members, most of large Indian Spinning Mills, Office Bearers of all the eleven cotton growing state associations, TEXPROCIL Chairman and SIMA Secretary-General.

The meeting discussed the state-wise pressing data provided by each state association and other input by stakeholders. Based on the input received and after extensive deliberations, the Committee arrived at total pressing numbers of all states and also drew cotton balance sheet which are enclosed:-

1. Crop for 2022-23 SEASON - **ANNEXURE 1**
2. BALANCE SHEET FOR 2022-23 SEASON AS ON 30TH SEPTEMBER 2023 - **ANNEXURE 2**
3. MONTHLY BALANCE SHEET FOR OCTOBER 2022 TO SEPTEMBER 2023 - **ANNEXURE 3**
4. STATE-WISE STOCK DATA - **ANNEXURE 4**

The meeting also dwelt on the Indian cotton consumption pattern and deliberated on the need for undertaking an independent survey to arrive at more accurate cotton consumption in India. Most of the members present in this meeting were of the view that undertaking an independent survey to assess cotton consumption in India is need of the hour and such a survey would greatly help the value chain participants to take better and informed decisions in their day-to-day operations.

Mumbai

Date: 11<sup>th</sup> July 2023

Atul S. Ganatra

President



# COTTON ASSOCIATION OF INDIA

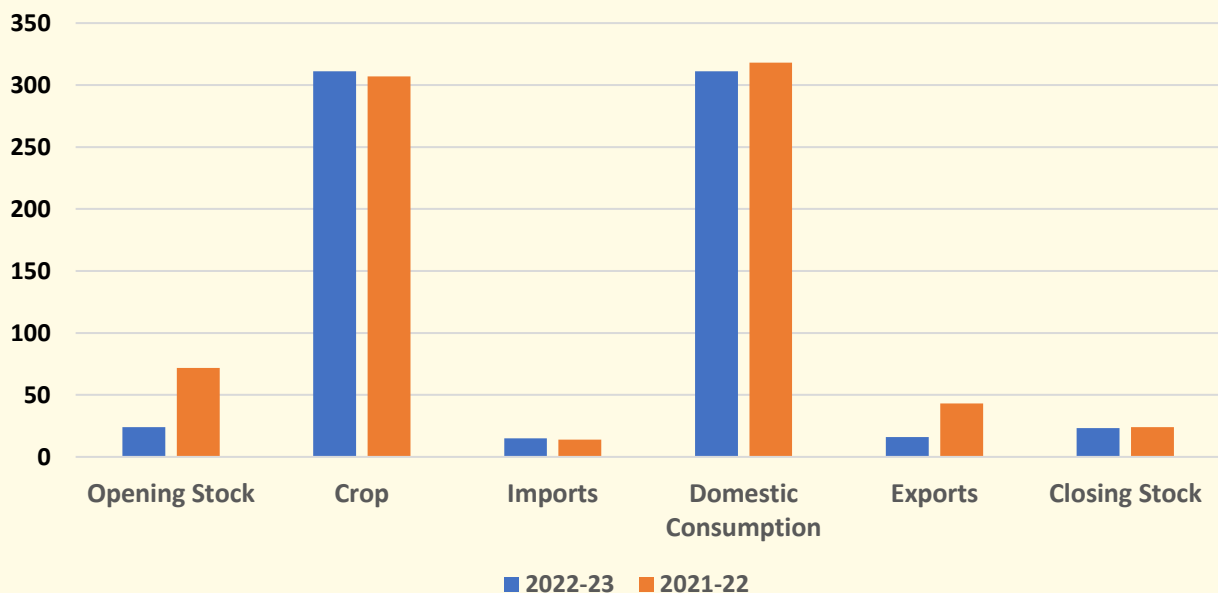
## INDIAN COTTON BALANCE SHEET FOR THE SEASON 2021-22 AND 2022-23

Estimated as on 30th June 2023

All Figures in Lakh Bales of 170 Kg

| Season                       | 2022-23       |               | 2021-22       | Change      |               |
|------------------------------|---------------|---------------|---------------|-------------|---------------|
| Details                      | May-23        | June-23       |               | Monthly     | Yearly        |
| <b>Supply</b>                |               |               |               |             |               |
| Opening Stock                | 31.89         | 24.00         | 71.84         | -7.89       | -47.84        |
| Crop                         | 298.35        | 311.18        | 299.16        | 12.83       | 12.02         |
| Imports                      | 15.00         | 15.00         | 14.00         |             | 1.00          |
| <b>Total Supply</b>          | <b>345.24</b> | <b>350.18</b> | <b>385.00</b> | <b>4.94</b> | <b>-34.82</b> |
| <b>Demand</b>                |               |               |               |             |               |
| Mill Consumption             | 280.00        | 280.00        | 293.00        |             | -13.00        |
| Consumption by SSI Units     | 15.00         | 15.00         | 19.00         |             | -4.00         |
| Non-Mill Consumption         | 16.00         | 16.00         | 6.00          |             | 10.00         |
| <b>Total Domestic Demand</b> | <b>311.00</b> | <b>311.00</b> | <b>318.00</b> |             | <b>-7.00</b>  |
| <b>Available Surplus</b>     | <b>34.24</b>  | <b>39.18</b>  | <b>67.00</b>  | <b>4.94</b> | <b>-27.82</b> |
| Exports                      | 20.00         | 16.00         | 43.00         | -4.00       | -27.00        |
| <b>Closing Stock</b>         | <b>14.24</b>  | <b>23.18</b>  | <b>24.00</b>  | <b>8.94</b> | <b>-0.82</b>  |

### Indian Cotton Comparative Balancesheet



**Remark:** - Last season's (2021-2022) crop size revised to 299.16 Lakh Bales. Effectively this season's opening balance reduced to 24.00 lakh bales from 31.89 Lakh Bales.



# COTTON ASSOCIATION OF INDIA

INDIAN COTTON CROP ESTIMATE FOR THE SEASON 2021-22 AND 2022-23

Estimated as on 30th June 2023

| State               | As on 30th June 2023 |             |               | As on 31st May 2023 |                         | 2021-22       |                        |
|---------------------|----------------------|-------------|---------------|---------------------|-------------------------|---------------|------------------------|
|                     | Pressed Bales        | Loose       | Total Bales   | Total Bales         | Monthly Change in Bales | Total Bales   | Yearly Change in Bales |
|                     |                      |             |               |                     |                         |               |                        |
| <b>North Zone</b>   |                      |             |               |                     |                         |               |                        |
| Punjab              | 2.30                 | 0.20        | 2.50          | 2.50                |                         | 8.50          | -6.00                  |
| Haryana             | 10.52                | 0.48        | 11.00         | 11.00               |                         | 16.10         | -5.10                  |
| Upper Rajasthan     | 17.67                | 0.33        | 18.00         | 17.00               | 1.00                    | 15.34         | 2.66                   |
| Lower Rajasthan     | 10.42                | 0.33        | 10.75         | 10.50               | 0.25                    | 10.33         | 0.42                   |
| <b>Total</b>        | <b>40.91</b>         | <b>1.34</b> | <b>42.25</b>  | <b>41.00</b>        | <b>1.25</b>             | <b>50.27</b>  | <b>-8.02</b>           |
| <b>Central Zone</b> |                      |             |               |                     |                         |               |                        |
| Gujarat             | 90.01                | 1.99        | 92.00         | 92.00               |                         | 74.29         | 17.71                  |
| Maharashtra         | 78.54                | 1.46        | 80.00         | 73.00               | 7.00                    | 72.00         | 8.00                   |
| Madhya Pradesh      | 19.00                | 0.50        | 19.50         | 19.00               | 0.50                    | 20.00         | -0.50                  |
| <b>Total</b>        | <b>187.55</b>        | <b>3.95</b> | <b>191.50</b> | <b>184.00</b>       | <b>7.50</b>             | <b>166.29</b> | <b>25.21</b>           |
| <b>South Zone</b>   |                      |             |               |                     |                         |               |                        |
| Telangana           | 29.09                | 0.91        | 30.00         | 31.00               | -1.00                   | 35.40         | -5.40                  |
| Andhra Pradesh      | 14.70                | 0.30        | 15.00         | 11.00               | 4.00                    | 15.00         |                        |
| Karnataka           | 20.45                | 0.55        | 21.00         | 20.00               | 1.00                    | 20.25         | 0.75                   |
| Tamil Nadu          | 4.86                 | 0.14        | 5.00          | 5.00                |                         | 6.87          | -1.87                  |
| <b>Total</b>        | <b>69.10</b>         | <b>1.90</b> | <b>71.00</b>  | <b>67.00</b>        | <b>4.00</b>             | <b>77.52</b>  | <b>-6.52</b>           |
| Orissa              | 3.35                 | 0.08        | 3.43          | 3.35                | 0.08                    | 2.08          | 1.35                   |
| Others              | 3.00                 |             | 3.00          | 3.00                |                         | 3.00          |                        |
| <b>Grand Total</b>  | <b>303.91</b>        | <b>7.27</b> | <b>311.18</b> | <b>298.35</b>       | <b>12.83</b>            | <b>299.16</b> | <b>12.02</b>           |

\* Loose cotton production figures are as per the survey report of Sardar Vallabhbhai Patel International School of Textiles and Management for a non-covid year.



# COTTON ASSOCIATION OF INDIA

## ALL INDIA COTTON ARRIVALS

As on 30th June 2023

|                     | Cumulative Arrival   |               | Monthly Change | Daily Average Arrival |                 |
|---------------------|----------------------|---------------|----------------|-----------------------|-----------------|
|                     | 30-06-23             | 31-05-23      |                | Monthly               | Cumulative      |
|                     | Lakh Bales of 170 Kg |               |                | 170 Kg Bales          |                 |
| <b>North Zone</b>   |                      |               |                |                       |                 |
| Punjab              | 2.43                 | 2.35          | 0.08           | 267                   | 890             |
| Haryana             | 8.84                 | 8.45          | 0.39           | 1,300                 | 3,238           |
| Upper Rajasthan     | 17.32                | 16.78         | 0.54           | 1,800                 | 6,344           |
| Lower Rajasthan     | 10.36                | 10.25         | 0.11           | 367                   | 3,795           |
| <b>Total</b>        | <b>38.95</b>         | <b>37.83</b>  | <b>1.12</b>    | <b>3,733</b>          | <b>14,267</b>   |
| <b>Central Zone</b> |                      |               |                |                       |                 |
| Gujarat             | 83.24                | 75.95         | 7.29           | 24,300                | 30,491          |
| Maharashtra         | 70.54                | 62.68         | 7.86           | 26,200                | 25,839          |
| Madhya Pradesh      | 17.95                | 17.10         | 0.85           | 2,833                 | 6,575           |
| <b>Total</b>        | <b>171.73</b>        | <b>155.73</b> | <b>16.00</b>   | <b>53,333</b>         | <b>62,905</b>   |
| <b>South Zone</b>   |                      |               |                |                       |                 |
| Telangana           | 28.62                | 27.40         | 1.22           | 4,067                 | 10,484          |
| Andhra Pradesh      | 13.50                | 9.15          | 4.35           | 14,500                | 4,945           |
| Karnataka           | 19.90                | 18.60         | 1.30           | 4,333                 | 7,289           |
| Tamil Nadu          | 3.10                 | 1.50          | 1.60           | 5,333                 | 1,136           |
| <b>Total</b>        | <b>65.12</b>         | <b>56.65</b>  | <b>8.47</b>    | <b>28,233</b>         | <b>23,853</b>   |
| Orissa              | 3.43                 | 3.35          | 0.08           | 267                   | 1,256           |
| Others              | 2.75                 | 2.75          |                |                       | 1,007           |
| <b>Grand Total</b>  | <b>281.98</b>        | <b>256.31</b> | <b>25.67</b>   | <b>85,567</b>         | <b>1,03,289</b> |



# COTTON ASSOCIATION OF INDIA

## Balance Sheet of 9 months

From 1-Oct-2022 to 30-Jun-2023

| Details   | In Lakh Bales<br>of 170 kg | in '000 Tons    |
|---|----------------------------|-----------------|
| Opening Stock as on 01-Oct-2022   | 24.00                      | 408.00          |
| Arrivals upto 30-Jun-2023   | 281.98                     | 4,793.66        |
| Imports upto 30-Jun-2023  | 10.00                      | 170.00          |
| <b>Total Available</b>  | <b>315.98</b>              | <b>5,371.66</b> |
| Consumption   | 238.00                     | 4,046.00        |
| Export Shipments upto 30-Jun-2023                                       | 13.50                      | 229.50          |
| Stock with Mills  | 36.98                      | 628.66          |
| Stock with CCI, Maha. Fedn., MCX, MNCs, Ginners,<br>Traders & Exporters | 27.50                      | 467.50          |
| <b>Total</b>  | <b>315.98</b>              | <b>5,371.66</b> |



# COTTON ASSOCIATION OF INDIA

STATE-WISE COTTON STOCK AS ON 30TH JUNE 2023

(in lakh bales of 170 kgs. each)

| State                     | Minimum      | Maximum      |
|---------------------------|--------------|--------------|
| Punjab                    | 0.10         | 0.15         |
| Haryana                   | 0.20         | 0.25         |
| Rajasthan                 | 1.25         | 1.65         |
| <b>Total North Zone</b>   | <b>1.55</b>  | <b>2.05</b>  |
| Gujarat                   | 5.00         | 6.00         |
| Maharashtra               | 10.00        | 11.00        |
| Madhya Pradesh            | 2.00         | 2.10         |
| <b>Total Central Zone</b> | <b>17.00</b> | <b>19.10</b> |
| Telangana                 | 3.50         | 4.00         |
| Andhra Pradesh            | 1.10         | 1.30         |
| Karnataka                 | 1.25         | 1.50         |
| Tamil Nadu                |              |              |
| <b>Total South Zone</b>   | <b>5.85</b>  | <b>6.80</b>  |
| Orissa                    | 0.45         | 0.55         |
| Others                    |              |              |
| <b>Grand Total</b>        | <b>24.85</b> | <b>28.50</b> |

Minimum stock with ginners, traders, CCI, MNCs is 24.85 lakh bales and maximum stock is 28.50 lakh bales.



# CAI Services



**Cotton Testing  
Laboratories**



**Maintain Indian  
Cotton Grade  
Standard**



**Indian Cotton  
Spot Rate**



**Arbitration and  
Conciliation  
Mechanism**



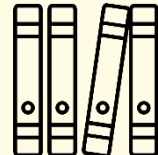
**Cotton Research  
and  
Development**



**Issue Certificate  
of Origin**



**Indian Cotton  
Statistics**



**Publications**