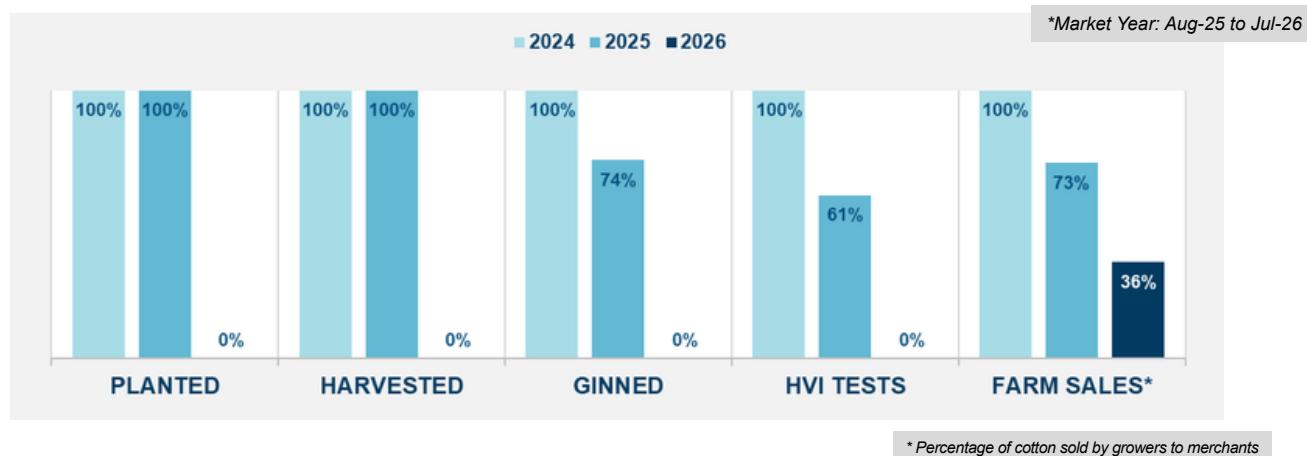


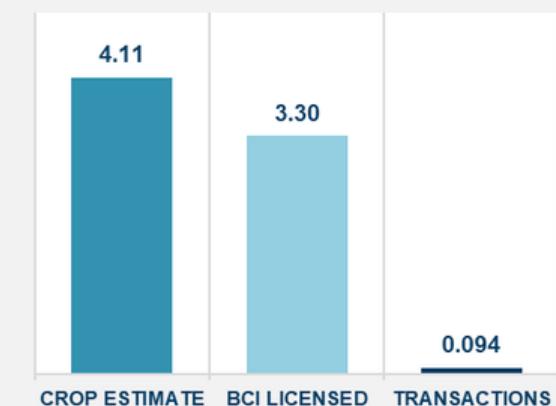
1. HIGH LIGHTS

- In October, Brazil exported **293.9 thousand tonnes of cotton**, reaching a total of **550 thousand tonnes** in the first three months of the 2025/26 marketing year. This is the second-best performance since 2020/21.
- In the month, China and India each imported **more than 67 thousand tonnes**. In the accumulated total for 2025/26, three countries led: China, India, and Bangladesh, accounting for **52% of the volume (285,427 tonnes)**.
- "Brazil presents two innovations at ITMA Asia + CITME"; Textile Exchange Conference and October Quality Report: **see more in the "Made in Brazil" section**.

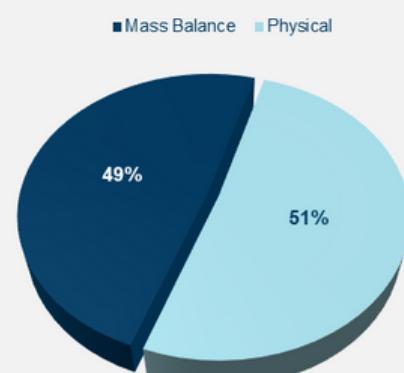
2. STATUS OF BRAZIL'S COTTON CROP



BETTER COTTON DEMAND - 2024/25 (IN MILLION TONNES)



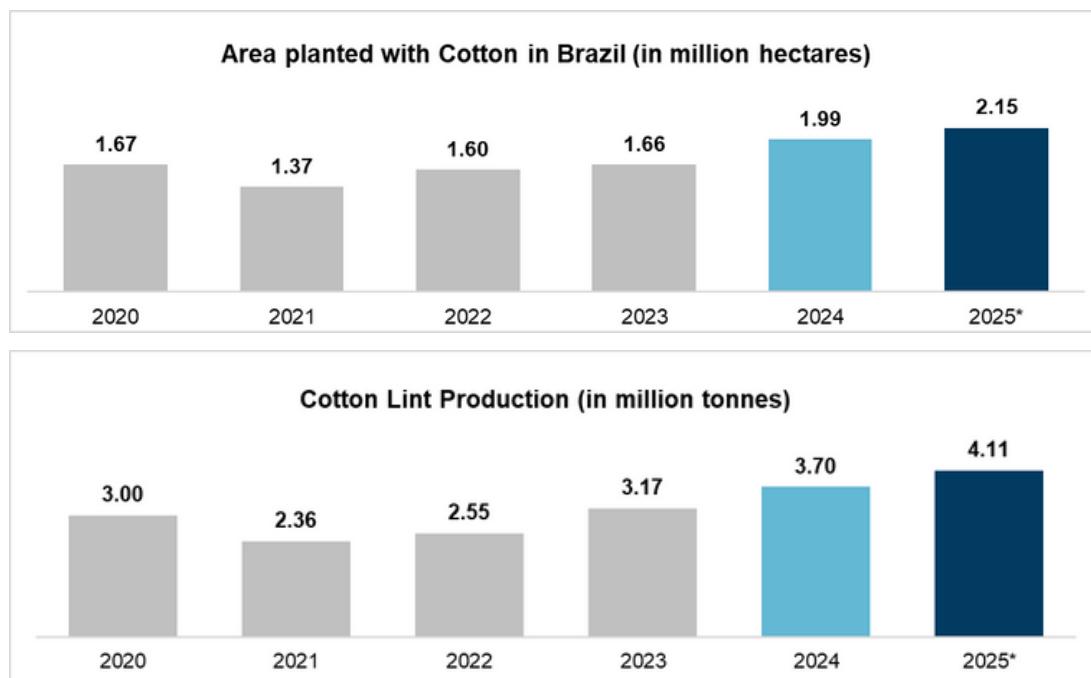
BCI TRANSACTIONS (AUG-OCT/2025)





3. 2025 CROP

Abrapa updated its projections for Brazil's cotton crop in September. The projected planted area for 2025 was revised to **2.15 million hectares**, 10.4% higher than in 2024. The production estimate also increased, reaching **4.11 million tonnes** — up 11.1% from the previous year.



Source: Conab *Forecast 2025: Abrapa (Sep 25)

With the data update in September, Brazil's average cotton yield for the 2025 crop increased by 3.5% compared to the previous forecast, reaching **1,915 kg/ha**.

Brazilian Cotton Harvest						
PRODUCTION (million tons)	2020	2021	2022	2023	2024	2025*
SEED COTTON (lint + Seed)	7.37	5.80	6.27	7.70	8.91	9.98
LINT (COTTON)	3.00	2.36	2.55	3.17	3.70	4.11
YIELD (kg/ha)	2020	2021	2022	2023	2024	2025*
SEED COTTON (Lint + Seed)	4,426	4,230	3,920	4,628	4,585	4,649
LINT (COTTON)	1,802	1,721	1,596	1,907	1,904	1,915

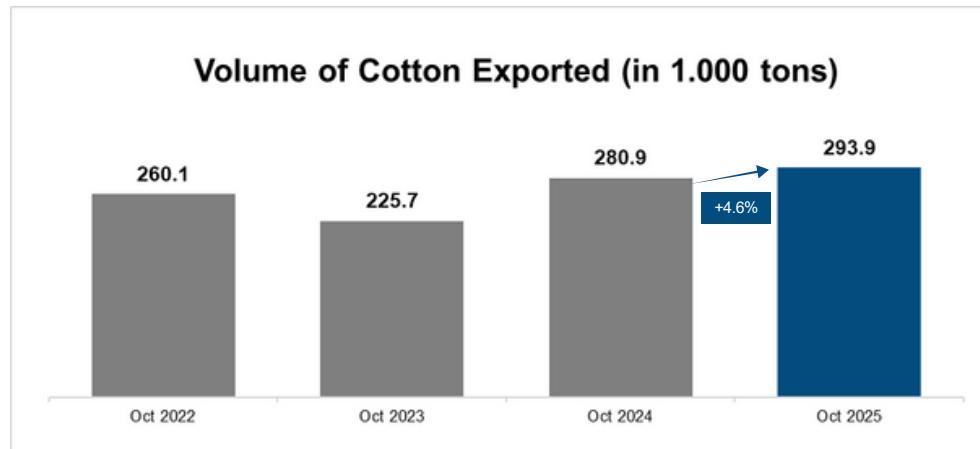
24 vs. 23 (%)	25 vs. 24 (%)
15.7%	12.0%
16.7%	11.1%

24 vs. 23 (%)	25 vs. 24 (%)
-0.9%	1.4%
0.0%	0.6%

Source: Conab *Forecast: Abrapa (Sep 25)

4. EXPORT SHIPMENTS

In October, Brazil exported 293.9 thousand tonnes of cotton (+4.6% compared to the same month in 2024), generating US\$ 476.9 million in export revenues.

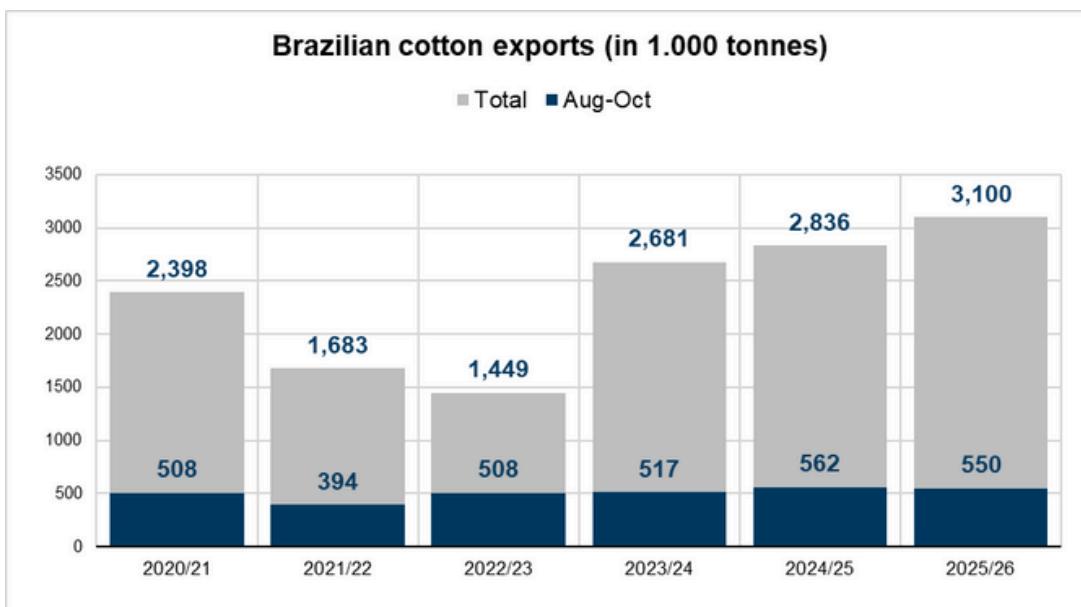
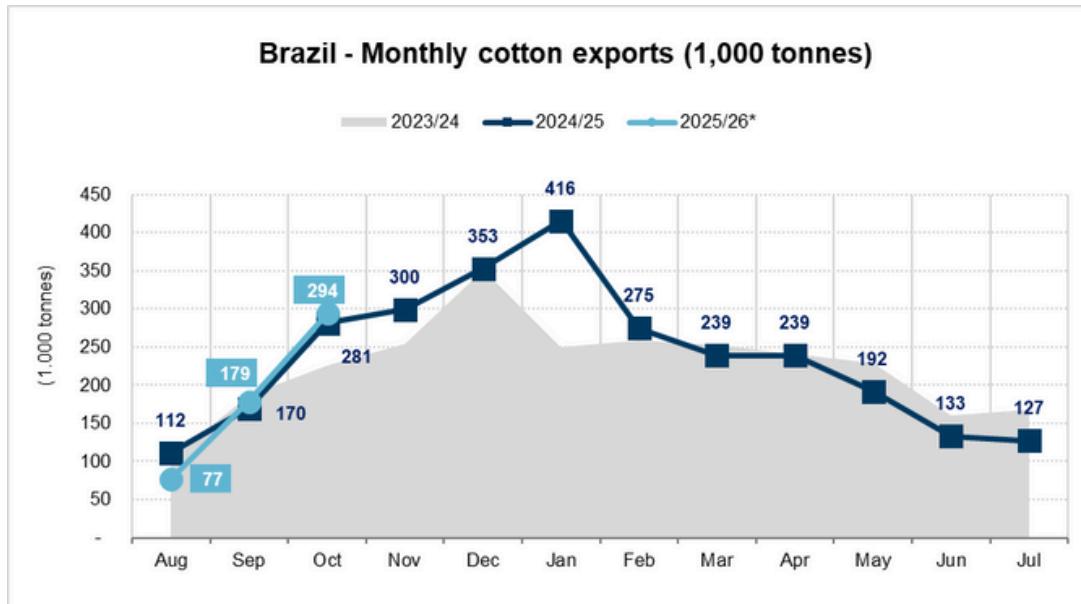


In October, **Brazil exported 67,797 tonnes of cotton to China** (23% of the total). India imported 67,684 tonnes (23%) and Bangladesh, 41,972 tonnes (14%).

Together, these three countries accounted for **177,453 tonnes, or 60% of total exports** in the month.



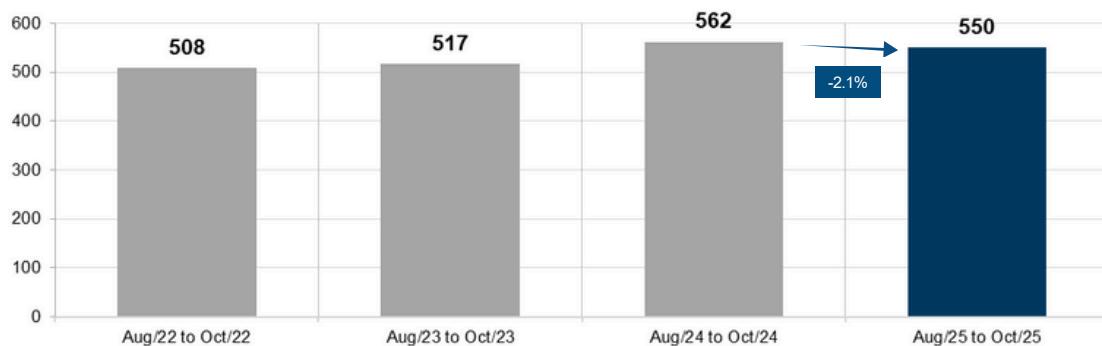
For the **second consecutive month**, Brazilian cotton exports surpassed the volume recorded in 2024/25 — and also in 2023/24. Cumulatively, so far, the 2025/26 cycle has **the second-best performance since 2020/21**.



Source: ComexStat – MDIC, Oct/2025. [Market Year: August to July.] Rounded figures. *Forecast

In the **first three months** of the 2025/26 marketing year, Brazil exported **550 thousand tonnes of cotton**, 2.1% less than in the same period of 2024/25.

Total Volume of Cotton Exported (1.000 tons)

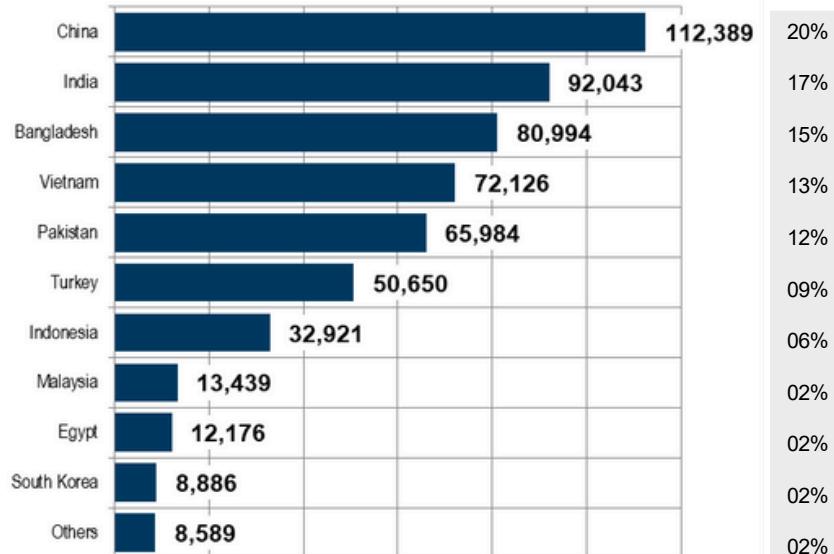


Source: ComexStat – MDIC, Nov/2025. [Market Year: August to July]

From August/25 to October/25, China imported **112,389 tonnes** of cotton from Brazil (20% of the total). India ranked second (**92,043 tonnes**; 17%), followed by Bangladesh (**80,994 tonnes**; 15%).

Together, these three countries account for **285,427 tonnes and 52%** of the total exported in the 2025/26 marketing year.

Brazilian Cotton Top Export Destinations (Aug/25 to Oct/25) in tons



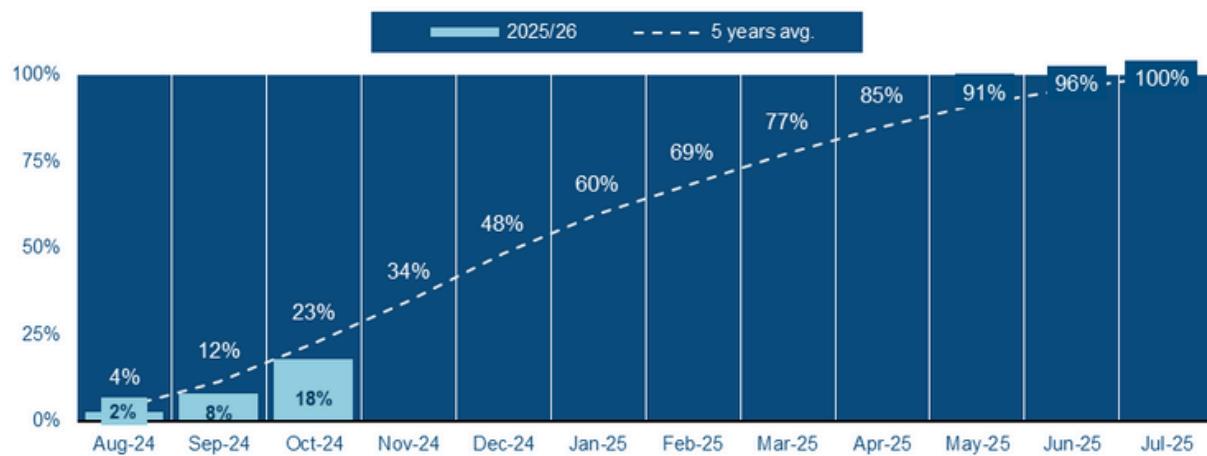
Source: ComexStat – MDIC, Nov/2025. [Market Year: August to July]

5. 2025/26 MARKET YEAR EXPORTS AND DOMESTIC USE

The charts below compare the performance of the current market year (2025/26) with the average Brazilian cotton exports over the last five years and the average volume for domestic use in Brazil also over the last five years.

2025/26 Export Shipments vs Average % of Accumulated Exports*

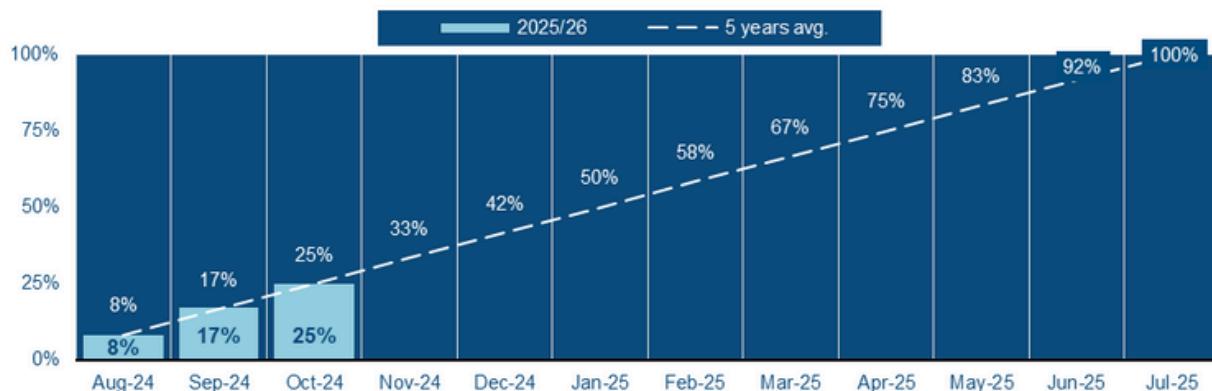
*Brazilian exports for 2025/26 estimated at 3.10 million tonnes



Source: MDIC and ANEA

2024/25 Domestic use estimate vs. accumulated domestic use 5-year avg

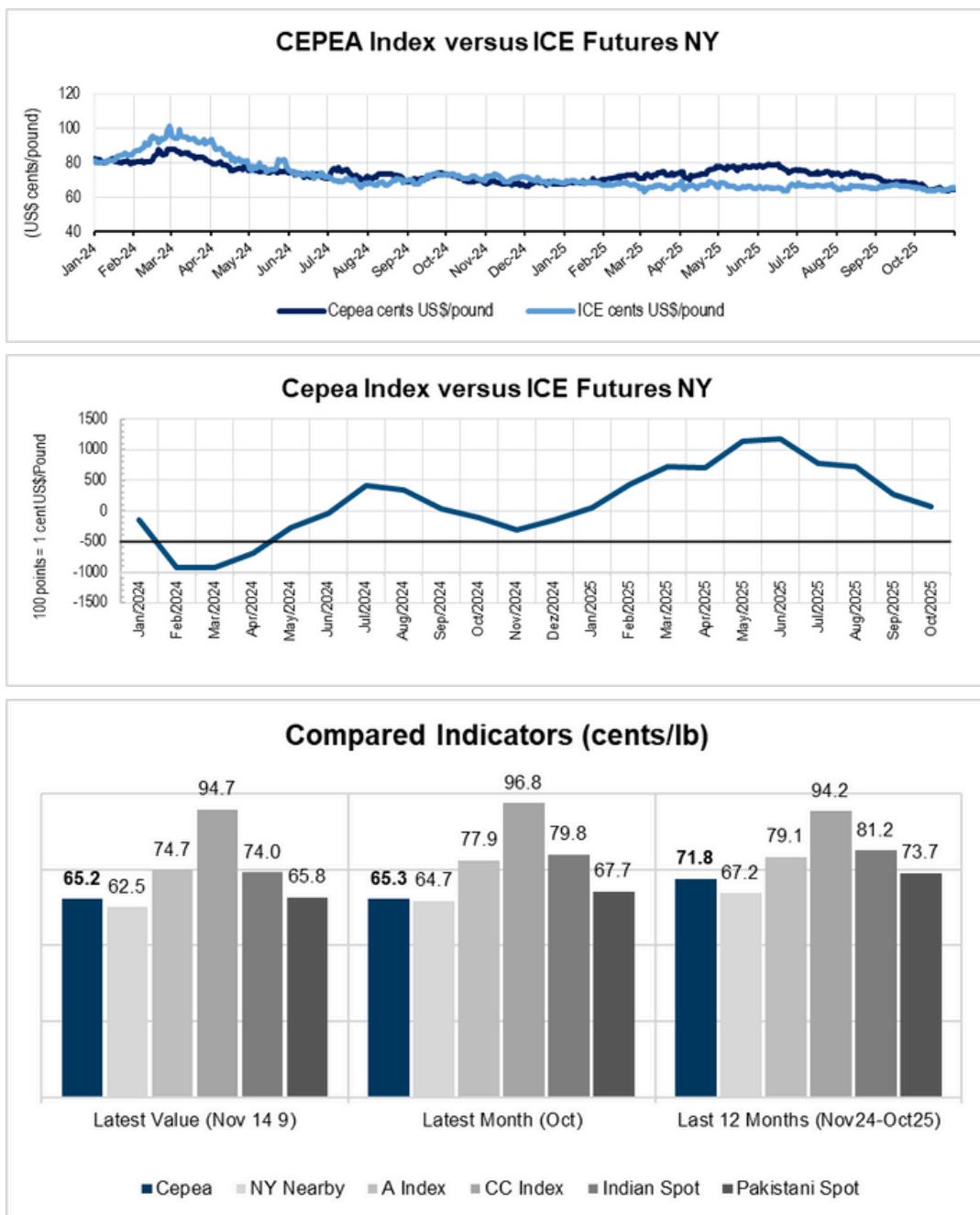
Domestic consumption estimated at 720 thousand tonnes (Aug25-Jul26)



Source: Abrapa, Conab and Abit

6. PRICES

In October, the Cepea/Esalq indicator fell by 5.6%, closing the month at 64.78 US cents per pound, while ICE prices fell by 0.3% over the same period. Over the past 12 months, domestic prices have declined by 4.8%.



The *CEPEA Index is the most commonly used price index for domestic cotton market prices in Brazil.

7. MADE IN BRAZIL

Data and information about Brazilian cotton production

Brazil presents two innovations at ITMA Asia + CITME

Brazil formally participated for the first time in the ITMA Asia + CITME event, held from October 28 to 31 in Singapore. During the exhibition, Abrapa launched two major innovations: the Brazilian Cotton Database and the Knowledge Hub, a digital platform of best practices for processing Brazilian cotton.

The **Brazilian Cotton Database** is a consultation system that facilitates the importer's access to the product's main indicators all at once. The system now allows the reading of multiple cotton bales in a single query, generating a comprehensive dossier - that is, a detailed multi-bale report with origin, quality (HVI), and certification data for each bale - which includes information



on the ginning plant and socio-environmental certifications (ABR, BCI, and Brazilian government).

The **Knowledge Hub**, the second innovation, compiled technical reports and educational content, which helps textile manufacturers achieve higher operational performance when using Brazilian lint.



Check out the October quality report

The latest Brazilian cotton quality report published by Abrapa attests to the high intrinsic quality of the fibre in October. [Click to check the full data.](#)

Brazil showcases best practices at Textile Exchange Conference

Abrapa participated in the Textile Exchange Conference 2025 in Lisbon, Portugal, with the objective of promoting the sustainability and innovation of Brazilian cotton to the global textile market. The delegation's core message was a call to action against the rising consumption of synthetic fibres, demonstrating how Brazilian cotton lint

contributes to a healthier fashion industry. Through high-level dialogue, the Association showcased that its growers' routine already incorporates robust sustainability certifications, established traceability systems, and advanced good farming practices, including the use of technology and regenerative agriculture techniques.