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Cotton Brazil market report

Monthly information on the Brazilian cotton crops and market news.
An information service produced and provided by Abrapa.

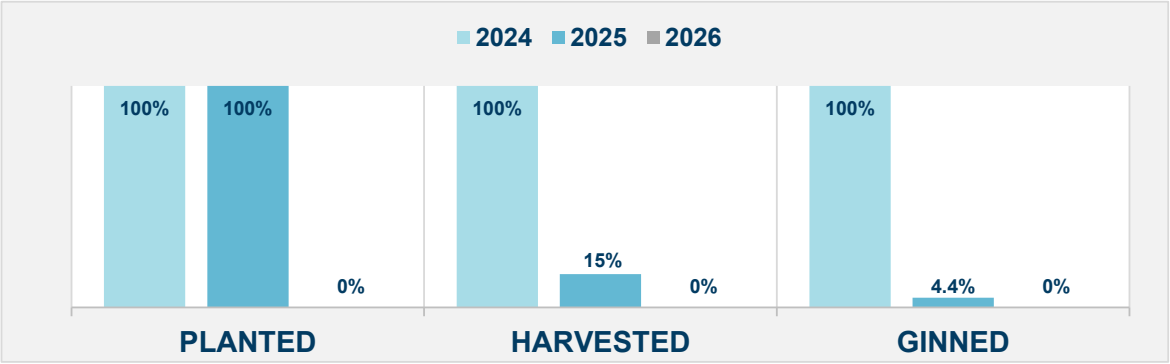
July 18th 2025

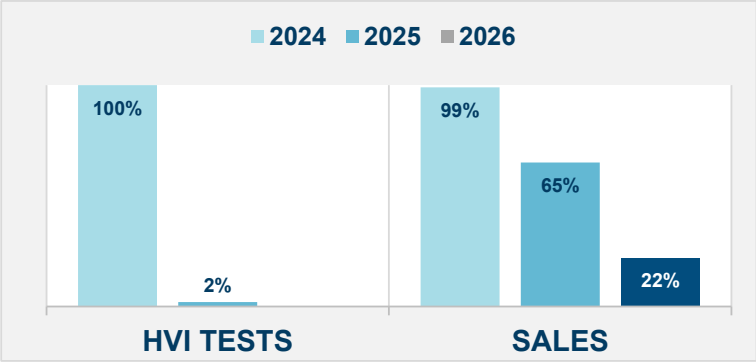
1. HIGHLIGHTS

- Brazil exported **132.8 thousand tonnes** of cotton in June 2025, a 17.2% reduction compared to that shipped in June 2024.
- **Bangladesh, Turkey and Vietnam** were the main buyers for the month, accounting for 72,933 tonnes, or 55% of total shipments.
- Cumulative exports for the 2024/25 marketing year reached **2.708 million tonnes** by the end of June, an increase of 7.7% compared to the same period in 2023/24.
- Environmental preservation by Brazilian cotton farmers and "BC Large Farm Week" - see more in the ***Made In Brazil*** section.

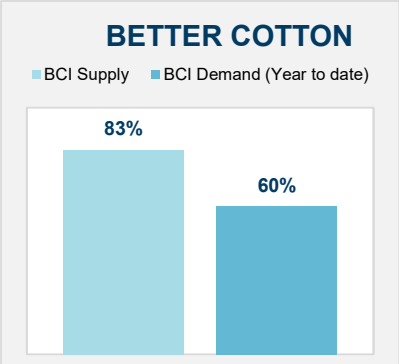
2. STATUS OF BRAZIL'S COTTON CROP

**Market Year: Aug-24 to Jul-25*





** Percentage of cotton sold by growers to merchants*



** Better Cotton licensed cotton volume in Brazil as a % of total Brazilian cotton production (2024 Crop year)*
*** Better Cotton Claimed Units claimed by buyers (2025 Crop year)*

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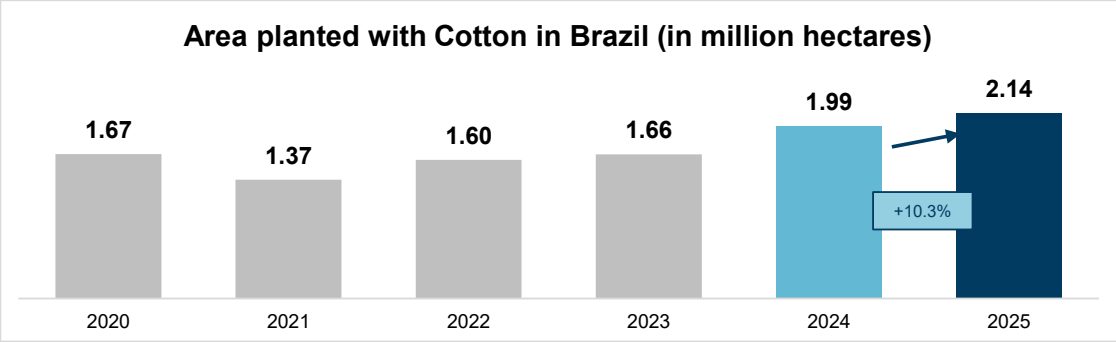
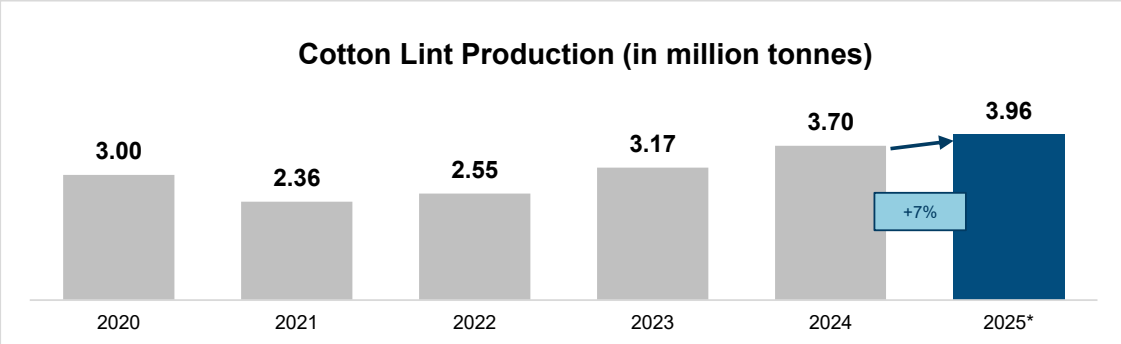
3. 2025 CROP

The projections for Brazil's cotton crop were updated by Abrapa on June 30th. The projected planted area is maintained at **2.14 million hectares** in 2025 – **10.3% higher** than in 2024. The production estimate increased to **3.96 million tonnes** – **7% higher** than in 2024.



Planting season in Brazil starts in November of the previous year



*Source: Conab *Forecast 2025: Abrapa (Jun/2025)*

The average yield for the 2025 crop reached **1.849 kg/ha**, representing a 2.9% decrease compared to 2024.

Brazilian Cotton Harvest

PRODUCTION (million tons)	2020	2021	2022	2023	2024	2025*	24 vs. 23 (%)	25 vs. 24 (%)
SEED COTTON (lint + Seed)	7.37	5.80	6.27	7.70	8.91	9.62	15.8%	8.0%
LINT (COTTON)	3.00	2.36	2.55	3.17	3.70	3.96	16.7%	7.0%

YIELD (kg/ha)	2020	2021	2022	2023	2024	2025*	24 vs. 23 (%)	25 vs. 24 (%)
SEED COTTON (Lint + Seed)	4,426	4,230	3,920	4,628	4,585	4,491	-0.9%	-2.1%
LINT (COTTON)	1,802	1,721	1,596	1,907	1,904	1,849	-0.2%	-2.9%

*Source: Conab *Forecast: Abrapa (Jun 25)*

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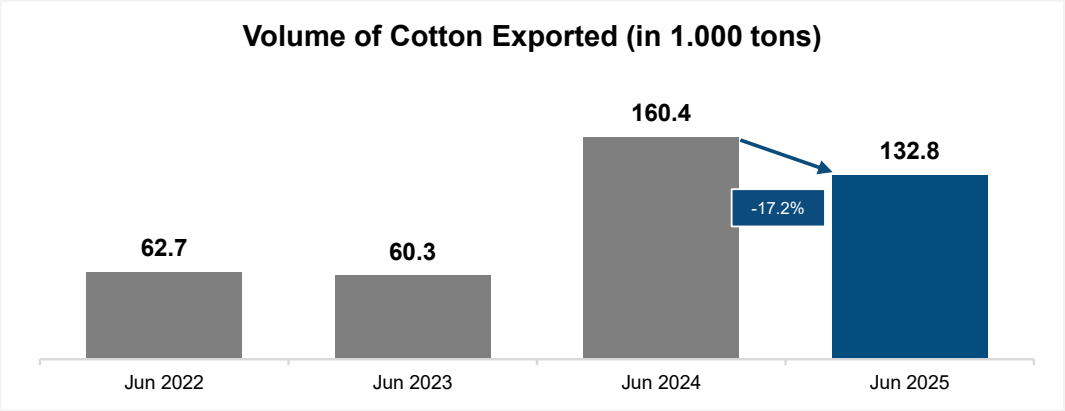
4. EXPORT SHIPMENTS

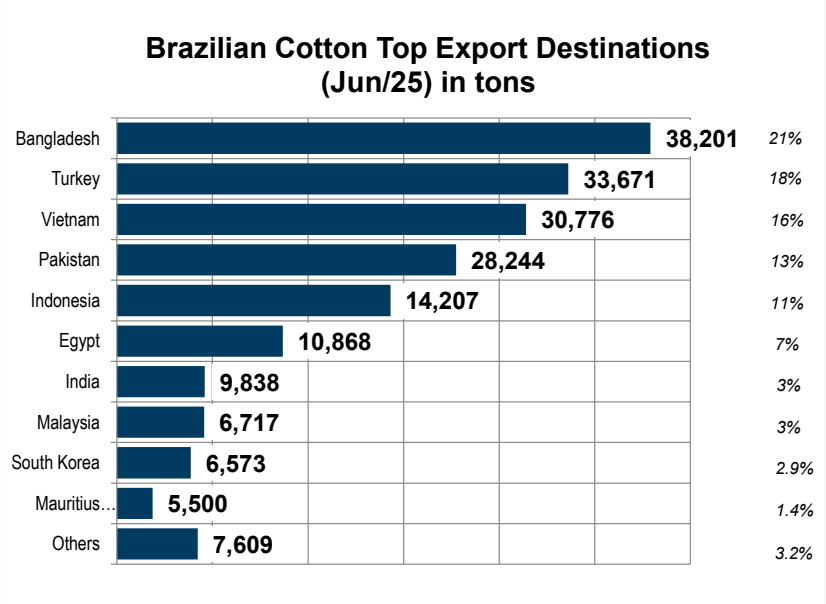
In June, Brazil exported **132.8 thousand tonnes** of cotton (-17.2% compared to the same month in 2024), generating **US$ 213.8 million** in export revenues.



Source: ComexStat – ME, Jul/2025

In June, Brazil exported **38,201 tonnes** of cotton to **Bangladesh** (21% of the total). Turkey imported 23,613 tonnes (18%) and Vietnam, 21,402 tonnes (16%).

Together, these three countries accounted for **72,933 tonnes**, or 55% of total exports in the month.



Source: ComexStat – ME, Jul/2025

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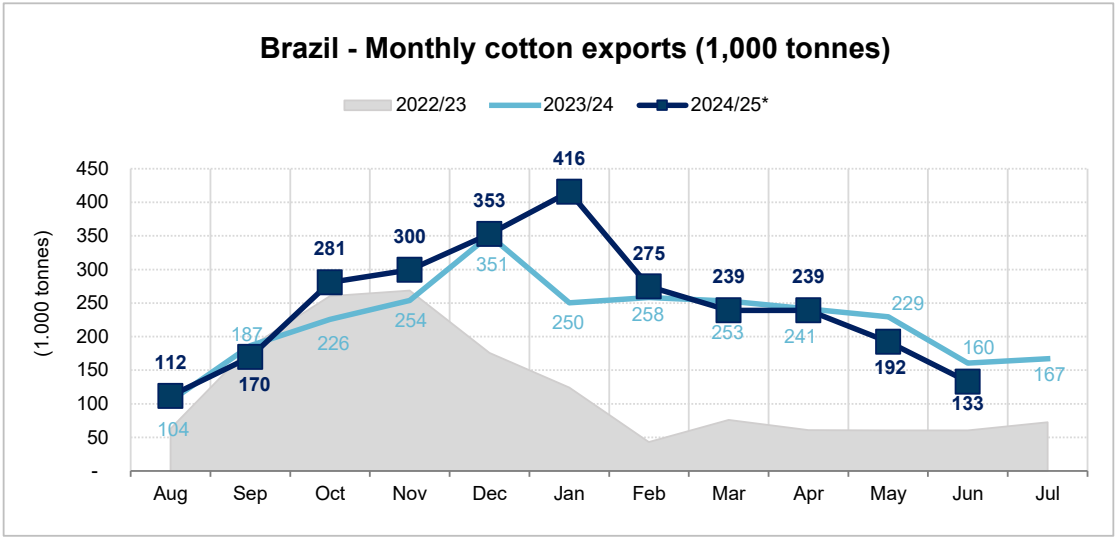
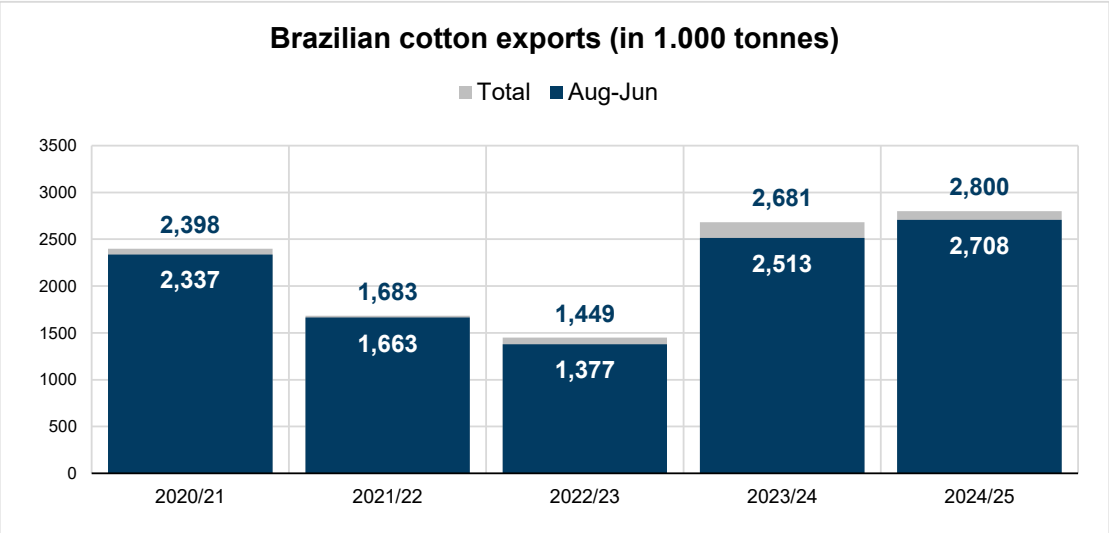
Brazil's cotton exports in June reached a cumulative total of **2.708 million tonnes**, an **increase of 7.7%** compared to the August–June period in the 2023/24 season. **This is a record volume for Brazil for the August-June period.** Even with one month remaining in the 2024/25 marketing year, performance has already surpassed that of 2023/24.



Source: ComexStat – ME, Jul/2025. [Market Year: August to July]



Source: ComexStat – ME, Jul2025. [Market Year: August to July.] *Forecast

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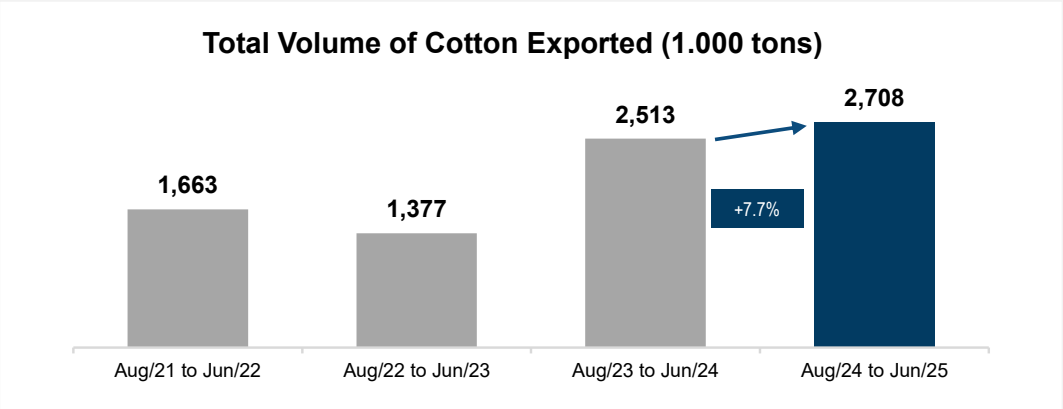
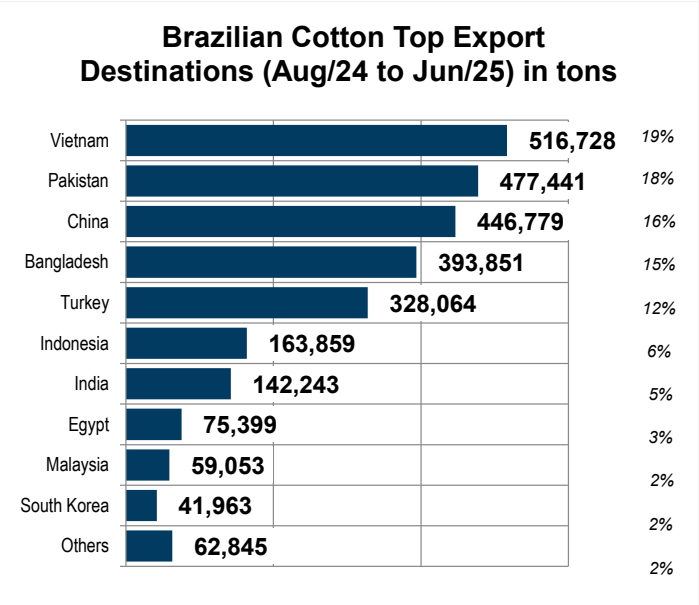
From August 2024 to June 2025, Brazil exported **2.708 million tonnes** of cotton **(+7.7%** compared to the same period in 2023/24). As a result, revenue generated by exports totalled **US$ 4.643 billion**.



Source: ComexStat – ME, Jul2025. [Market Year: August to July]

From August/24 to Jun/25, **Vietnam imported 516,728** tonnes of cotton (19% of the total). Pakistan ranked second (477,441 tonnes; 18%), followed by China (446,779 tonnes; 17%).

Together, these three countries account for **1.440 million tonnes and 53% of the total** exported in the 2024/25 marketing year.



Source: ComexStat – ME, Jul/2025. [Market Year: August to July]

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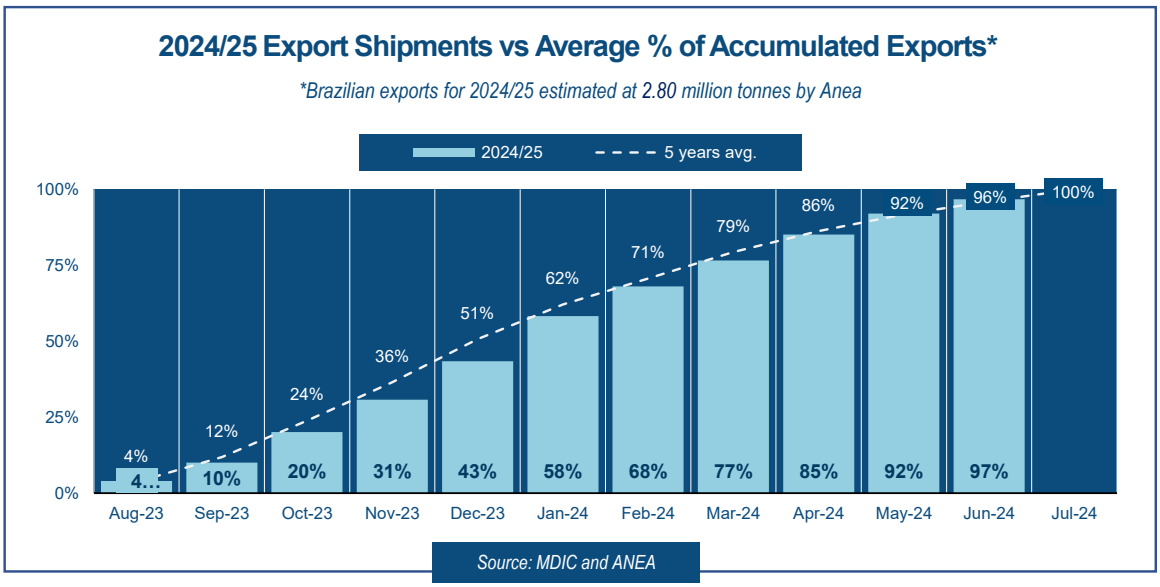
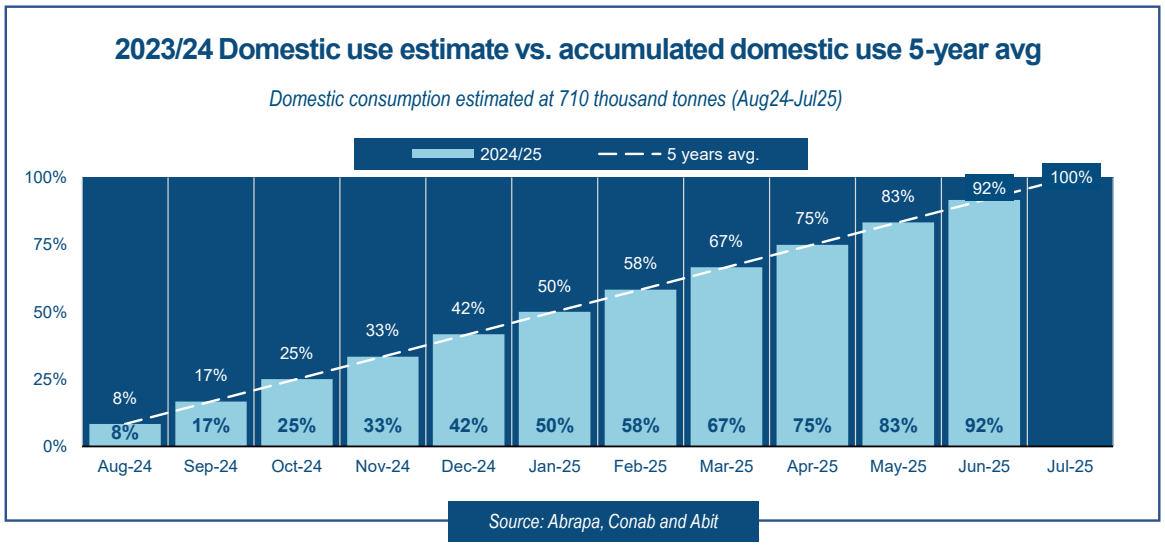
5. 2023/24 MARKET YEAR EXPORTS AND DOMESTIC USE

The charts below compare the performance of the current market year (2024/25) 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.





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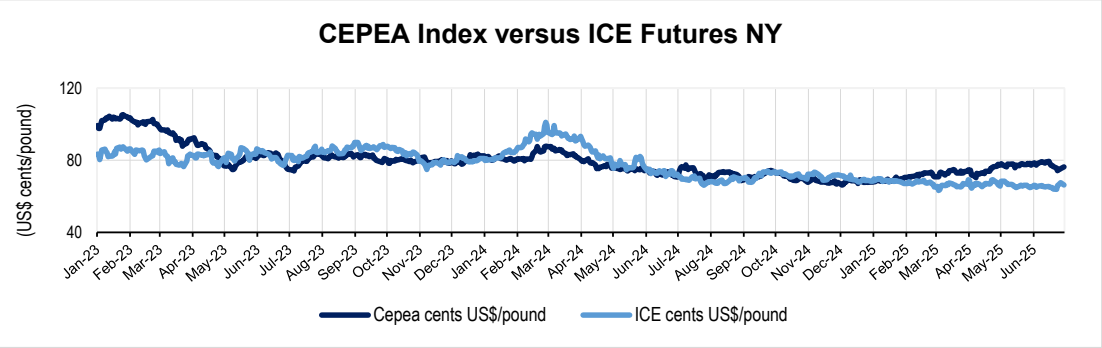
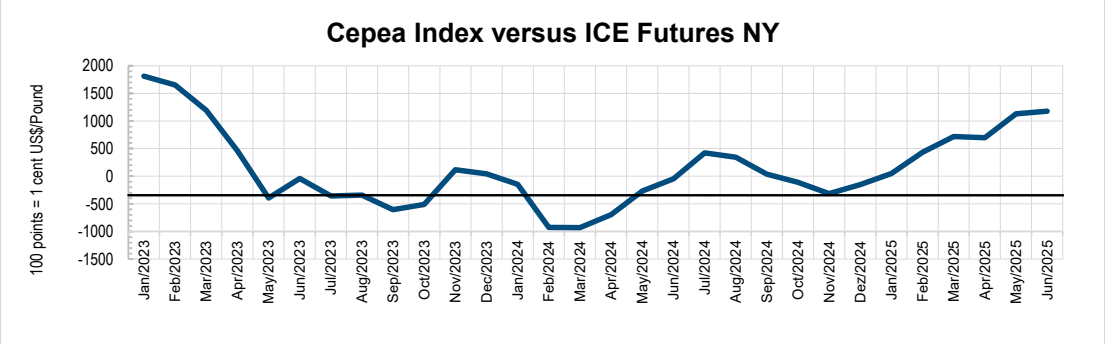
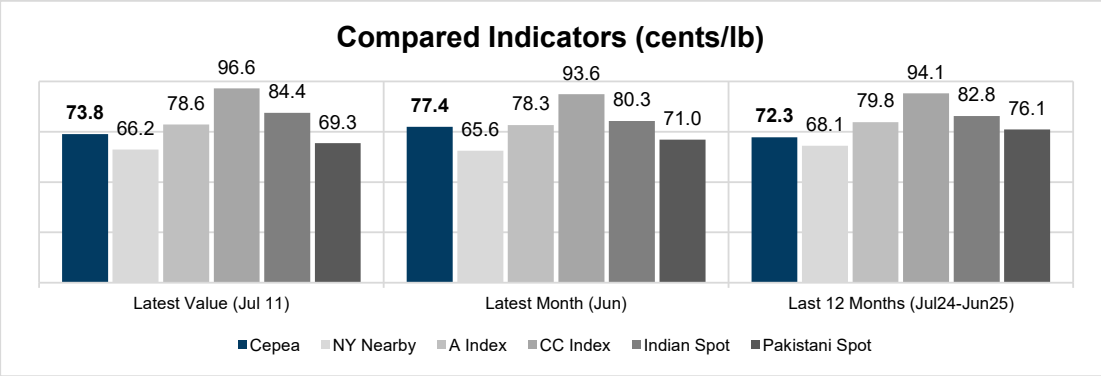
6. PRICES

In June, the Cepea/Esalq indicator dropped by 1.2% and closed the month at **76.35 US$ cents per pound** while ICE prices dropped by 7.4% in the same year. Over the last 12 months, domestic prices have **risen by 7.5%**.







Source: Cepea/USP and ICE Futures, Jul/2025

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

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7. MADE IN BRAZIL

Data and information about Brazilian cotton production

Abrapa highlights environmental preservation by Brazilian cotton farmers

In Brazil, in addition to prroducing fibre and food, cotton farmers contribute to the country's environmental and biodiversity protection.

This dual social role was the message conveyed this year by Abrapa at the Better Cotton Conference. The annual Better Cotton event took place in June in Turkey.

Cotton growers in Brazil put aside at least 20% of their farm area to preserve native vegetation. In Mato Grosso, the main growing state, this percentage reaches nearly 40%.

The Brazilian crop is grown on 0.2% of the country's territory. Between 1981 and 2025, the cotton area fell by 49% nationwide, whilst yelds increased by 1,200% and total production by 557%.

Furthermore, about 92% of cotton crop is rainfed, which means more efficient water usage.

In the last season, 84% of the entire national production was certified by both the ABR program and Better Cotton.

There is also a social contribution as the cotton production chain and the textile industry generate more than 10 million direct and indirect jobs.

Brazil hosts "Better Cotton Large Farm Week"

From July 7 to 11, Brazil hosted the "Large Farm Week," a Better Cotton initiative to strengthen the global community of large cotton producers committed to sustainability.

Producers, consultants, and researchers from 10 countries visited Brasília, Goiás, and Mato Grosso to learn about Brazil and share experiences about cotton farming. The program included workshops, technical visits to farms, ginning facilities, classification laboratories, research institutes, and cultural exchange activities. The "Large Farm Week" began in 2024 as an offshoot of the Better Cotton international symposium.