

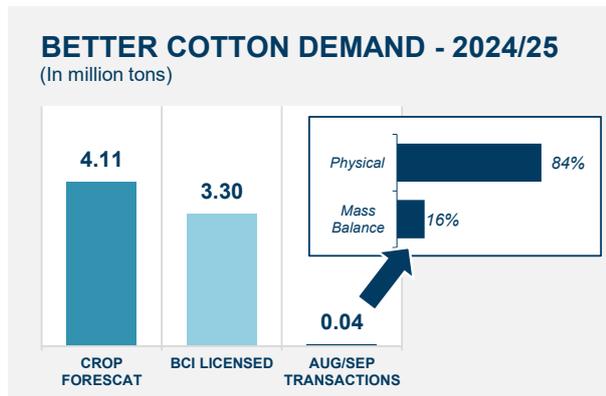
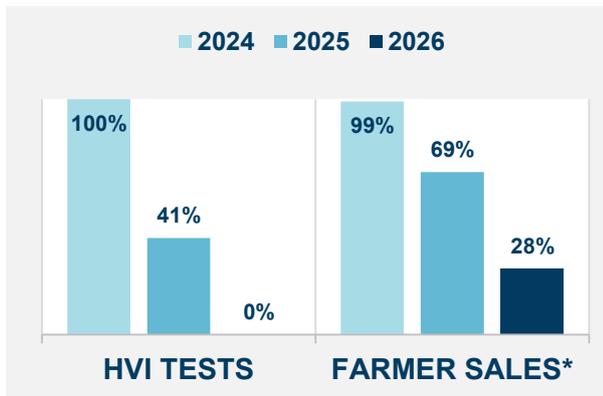
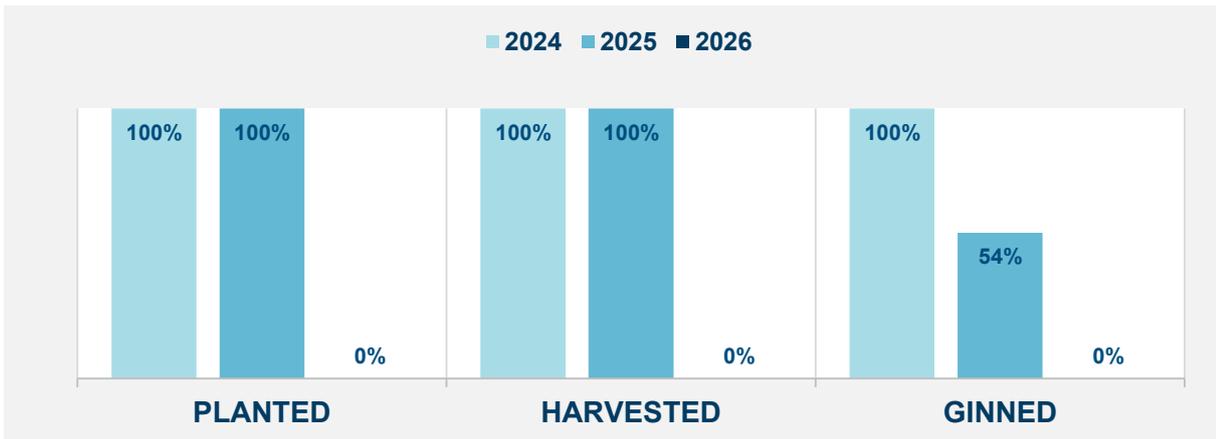


## 1. HIGHLIGHTS

- With the export of **179 thousand tonnes of cotton** in September 2025, Brazil totals **256 thousand tonnes** in the first two months of the 2025/26 marketing year.
- Together, **China, Pakistan, and Bangladesh** imported **126,308 tonnes**, accounting for **49%** of the total volume exported in the **first two months** of the 2025/26 marketing year.
- Brazilian exports generated **US\$ 290.6 million** in revenue in September/2025.
- "Global alliance for cotton strengthens at ICA Trade Event" and September Quality Report: see more in the **"Made in Brazil"** section.

## 2. STATUS OF BRAZIL'S COTTON CROP

\*Market Year: Aug-25 to Jul-26

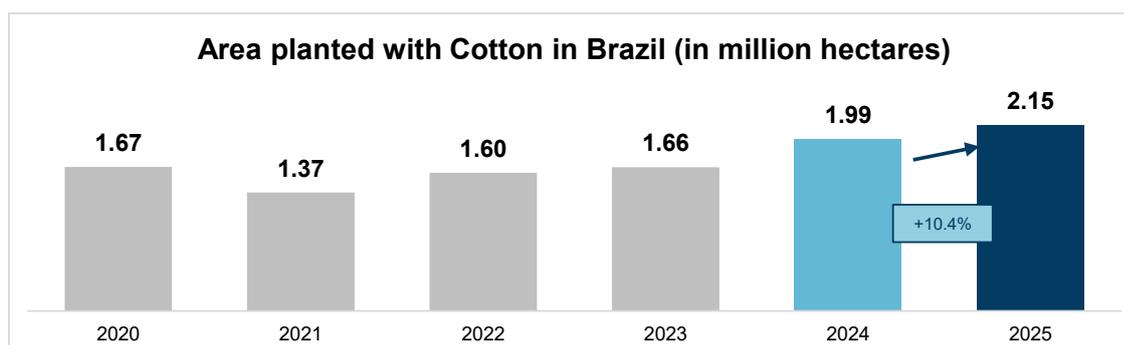


\* Percentage of cotton sold by growers to merchants

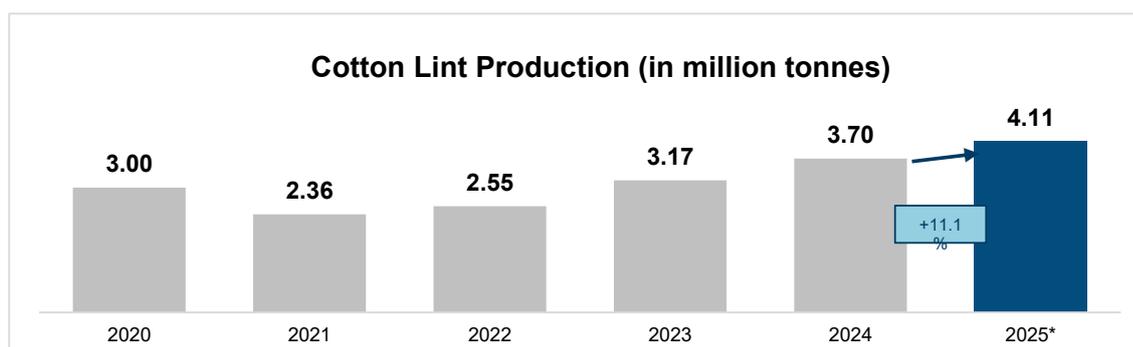


## 3. 2025 CROP

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.



Planting season in Brazil starts in November of the previous year



Source: Conab \*Forecast 2025: Abrapa (Sep/2025)

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

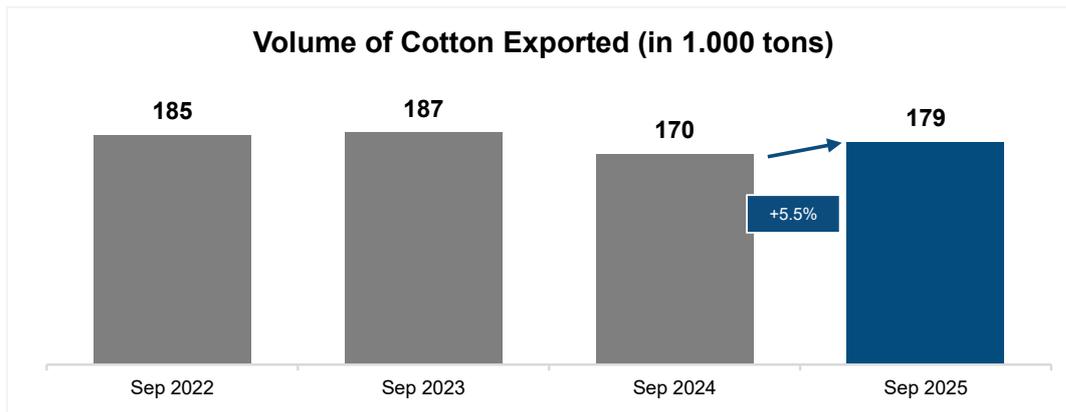
PRODUCTION (million tons)	2020	2021	2022	2023	2024	2025*	24 vs. 23 (%)	25 vs. 24 (%)
SEED COTTON (Lint + Seed)	7.37	5.80	6.27	7.70	8.91	9.98	15.7%	12.0%
LINT (COTTON)	3.00	2.36	2.55	3.17	3.70	4.11	16.7%	11.1%
YIELD (kg/ha)	2020	2021	2022	2023	2024	2025*	24 vs. 23 (%)	25 vs. 24 (%)
SEED COTTON (Lint + Seed)	4,426	4,230	3,920	4,628	4,585	4,649	-0.9%	1.4%
LINT (COTTON)	1,802	1,721	1,596	1,907	1,904	1,915	0.0%	0.6%

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



## 4. EXPORT SHIPMENTS

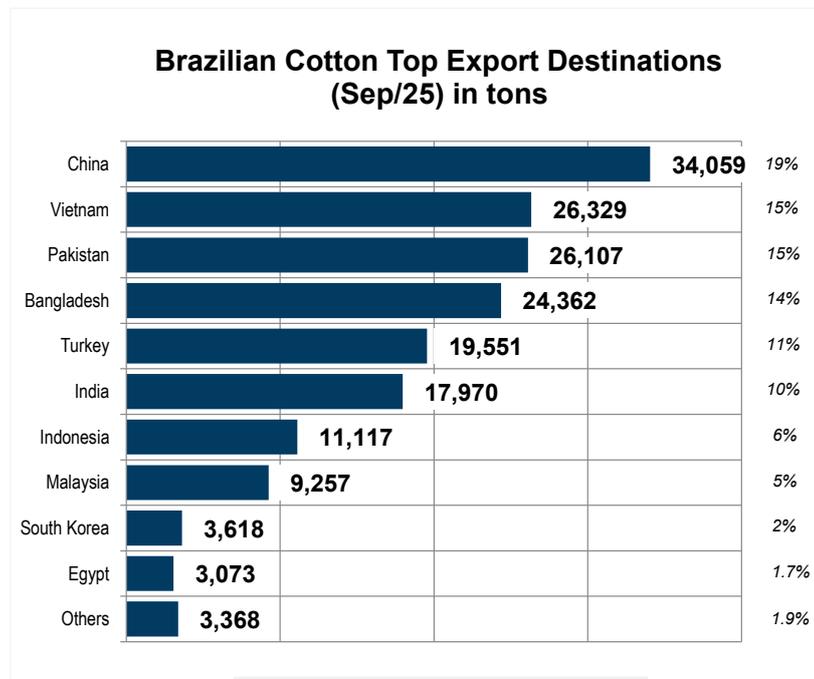
In September, Brazil exported **179 thousand tonnes** of cotton (+5.5% compared to the same month in 2024), generating **US\$ 290.6 million** in export revenues.



Source: ComexStat – MDIC, Oct/2025

In September, Brazil exported **34,056 tonnes** of cotton to **China** (19% of the total). Vietnam imported 26,329 tonnes (15%) and Pakistan, 26,107 tonnes (15%).

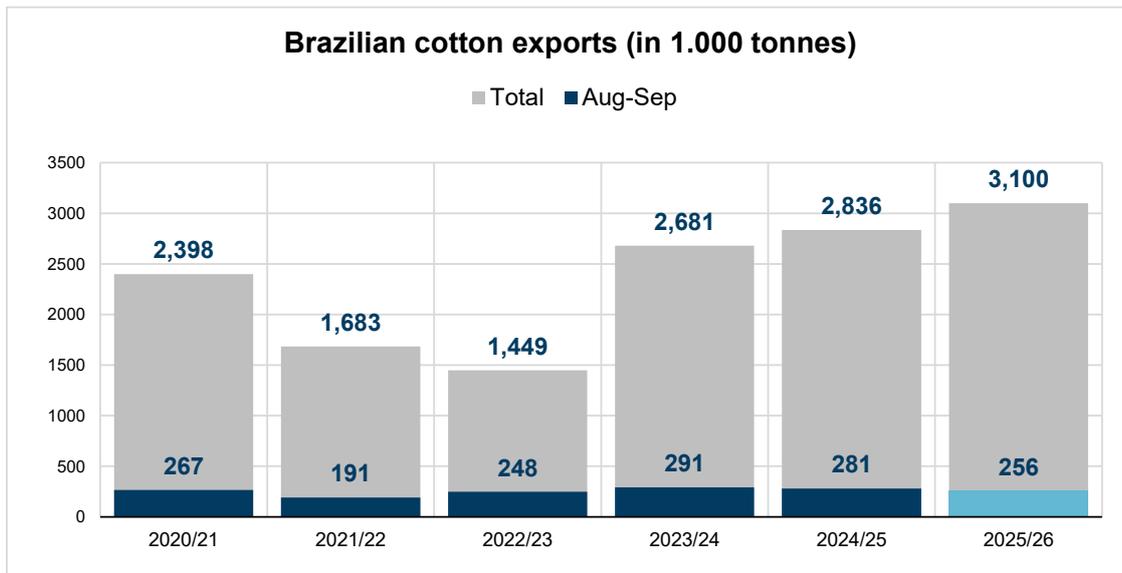
Together, these three countries accounted for **86,495 tonnes**, or 48% of total exports in the month.



Source: ComexStat – MDIC, Oct/2025



Exports of **179 thousand tonnes** of cotton in September, the second month of the 2025/26 marketing year, were **higher** than the volume recorded in September/2024.

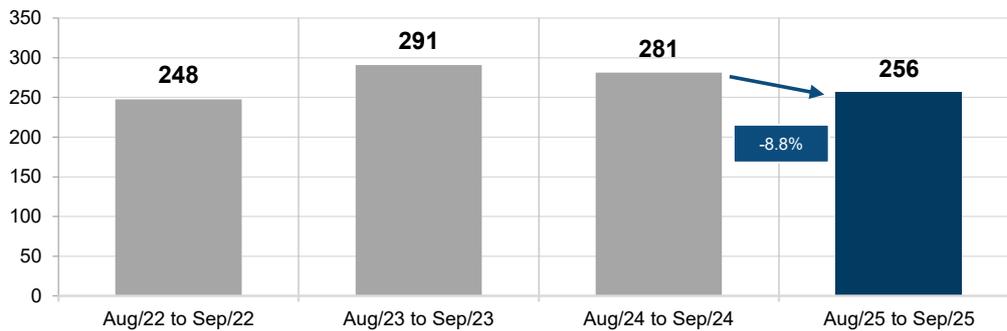


Source: ComexStat – MDIC, Oct/2025. [Market Year: August to July.] Rounded figures. \*Forecast



In the first two months of the 2025/26 marketing year, Brazil exported 256 thousand tonnes of cotton, 8.8% less than in the same period of 2024/25.

## Total Volume of Cotton Exported (1.000 tons)

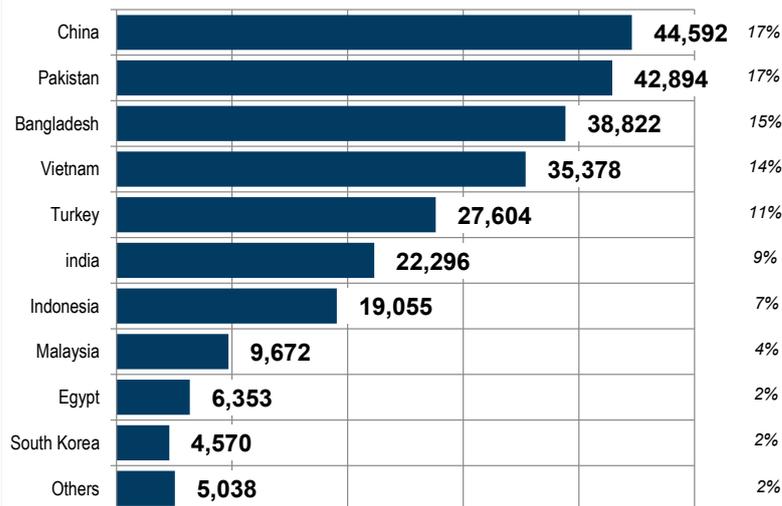


Source: ComexStat – MDIC, Oct/2025. [Market Year: August to July]

From August/25 to September/25, **China imported 44,592 tonnes** of cotton from Brazil (17% of the total). Pakistan ranked second (42,894 tonnes; 17%), followed by Bangladesh (38,822 tonnes; 15%).

Together, these three countries account for **126,308 tonnes and 49% of the total** exported in the 2025/26 marketing year.

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

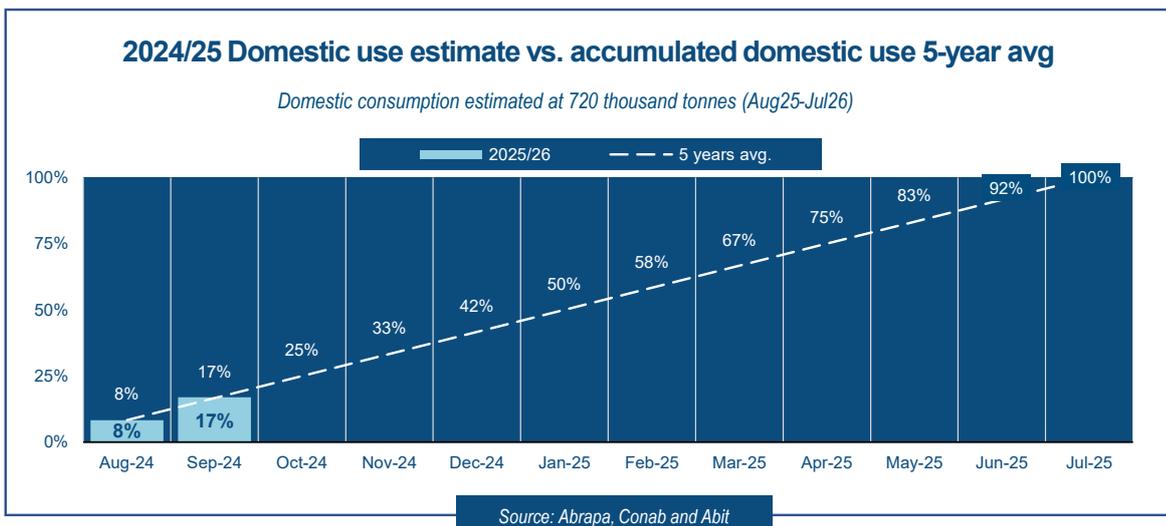
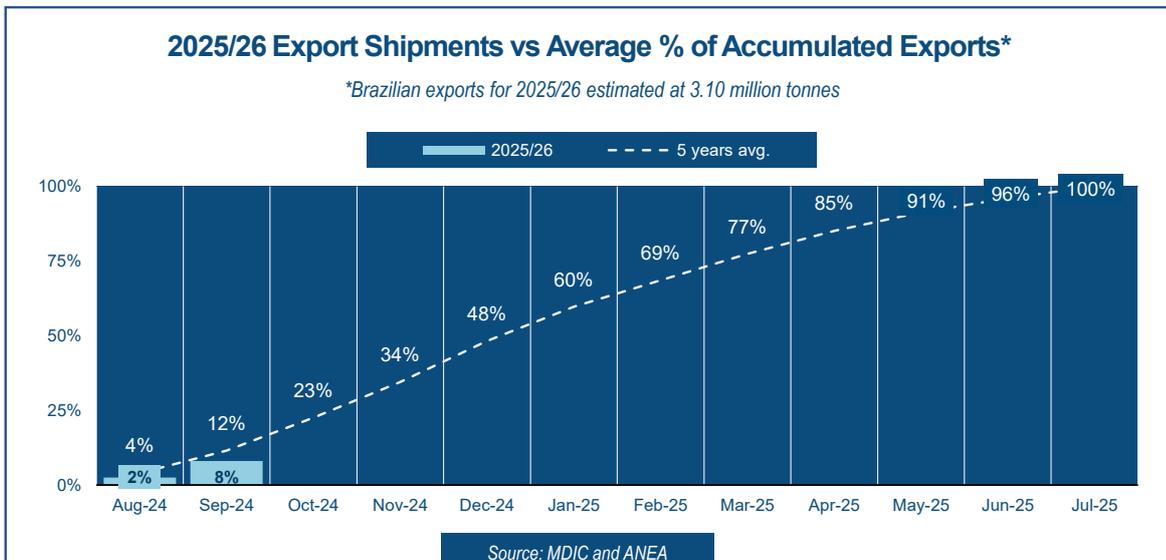


Source: ComexStat – MDIC, Oct/2025. [Market Year: August to July]



## 5. 2025/26 MARKET YEAR EXPORTS AND DOMESTIC USE

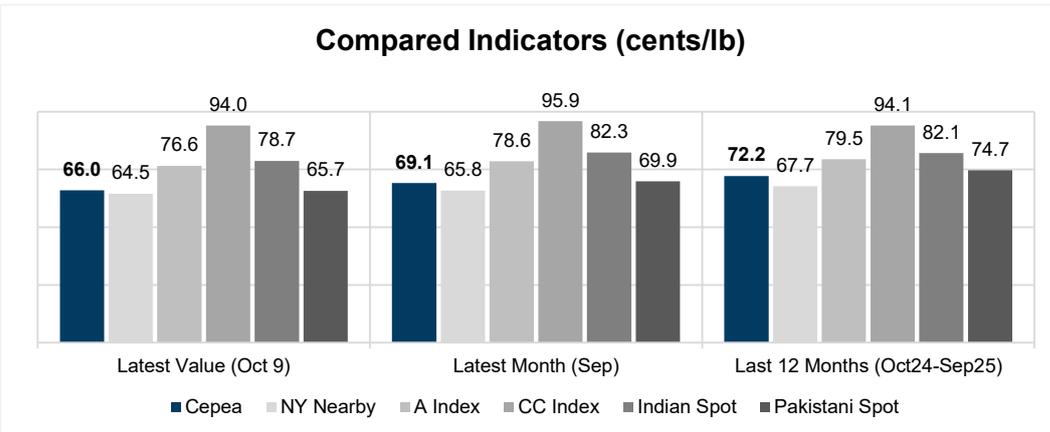
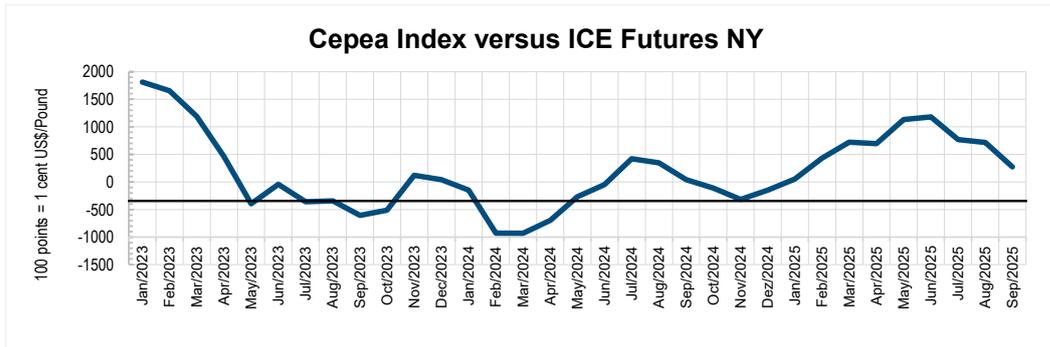
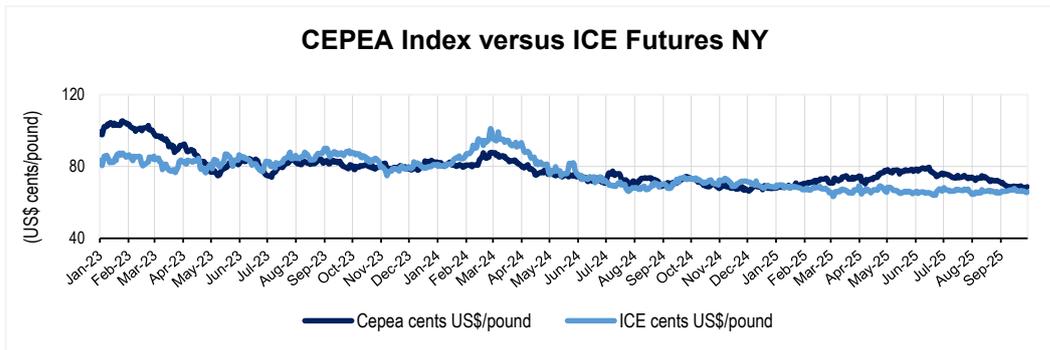
The charts below compare the performance of the current market year (2025/26) with the average Brazilian cotton exports over the last five years and the average volume for domestic use in Brazil also over the last five years.





## 6. PRICES

In September, the **Cepea/Esalq indicator fell by 4.8%**, closing the month at **68.65 US cents per pound**, while ICE prices rose by 0.9% over the same period. Over the past 12 months, domestic prices have **declined by 6.8%**.



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

#### Global Alliance for Cotton Strengthens at ICA Trade Event

One of the key highlights of the ICA Trade Event 2025, held in Dubai, was the trilateral meeting between Brazil, the United States and Australia. The discussion focused on joint strategies for promotion, communication and institutional advocacy of cotton.

The agenda also included legislative initiatives such as the Buy American Cotton Act (BACA) in the United States and international measures to reduce microplastic pollution.

Alongside the ICA Trade Event, Abrapa promoted the **Cotton Brazil Luncheon**, which brought together around 160 industry leaders and investors on World Cotton Day. The meeting featured panels on crop performance, exports and market trends, highlighting Brazil's progress in quality, traceability and sustainability.

Throughout the week, Abrapa also held business meetings



and networking sessions with traders, brokers and importers, reinforcing commercial partnerships and strengthening Brazil's position as a reliable supplier of high-quality cotton.

The ICA Trade Event marked the start of a series of international activities promoted by Abrapa in October through the Cotton Brazil programme, in partnership with ApexBrasil and Anea.

#### Click to access the September quality report



Check out the results of the September quality report by **clicking here**. So far, 9.5 million cotton bales have been analysed, corresponding to the 2025 harvest year. The total forecasted volume for the season is 19.2 million bales, representing 100% of national production.