

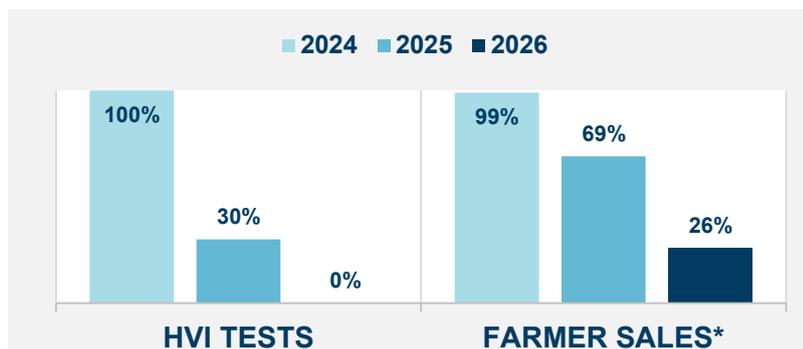
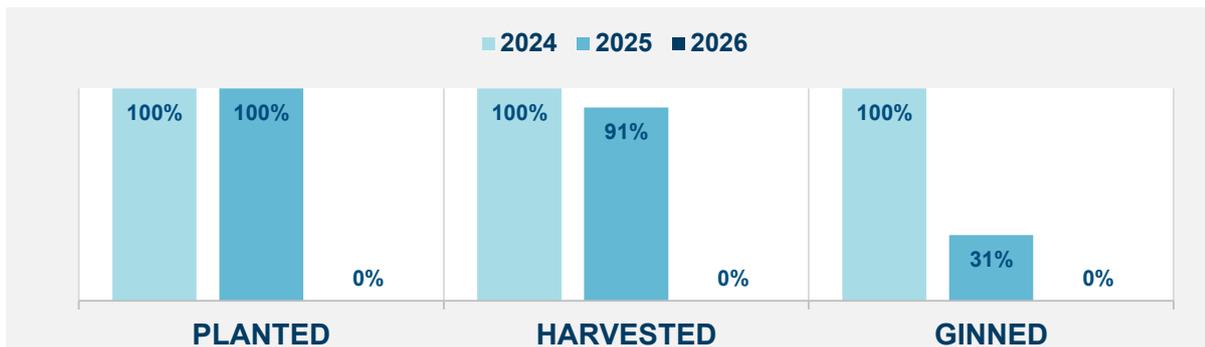


1. HIGHLIGHTS

- Brazil shipped **77.5 thousand tonnes** in the first month of the 2025/26 marketing year, a lower volume than that exported in Aug/24 and Aug/23.
- **Pakistan, Bangladesh, and China** were the top three destinations for Brazilian cotton, totaling 41,445 tonnes, or 53% of the total.
- Brazilian exports generated revenues of **US\$ 123.5 million** for the month.
- In August, Abrapa hosted textile industry representatives from **six countries** and participated in **Expo Osaka, Japan**; see more in the “Made in Brazil” section.

2. STATUS OF BRAZIL'S COTTON CROP

*Market Year: Aug-25 to Jul-26



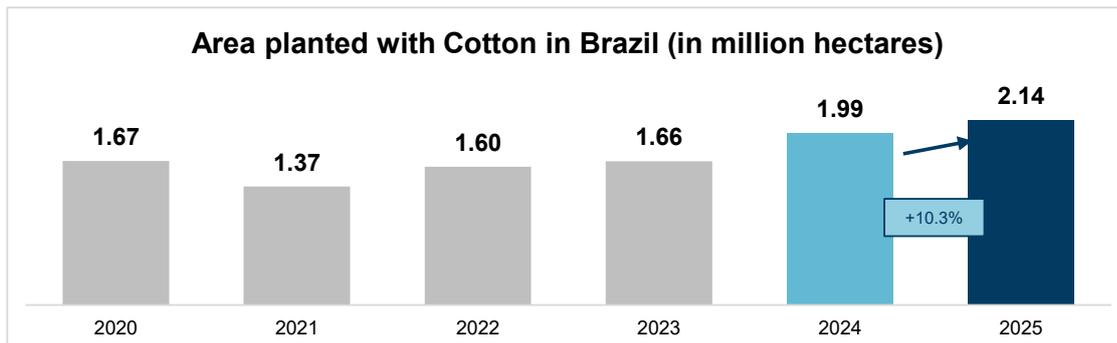
The data regarding the volume of Brazilian cotton licensed by Better Cotton are being updated.

* Percentage of cotton sold by growers to merchants

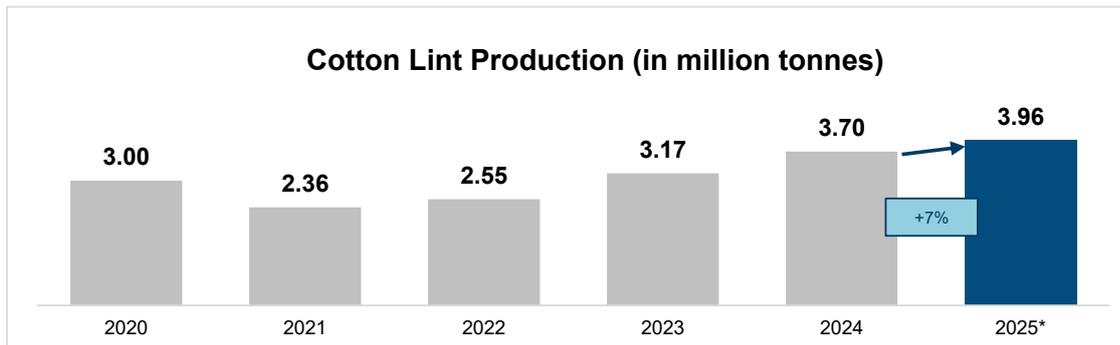


3. 2025 CROP

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%

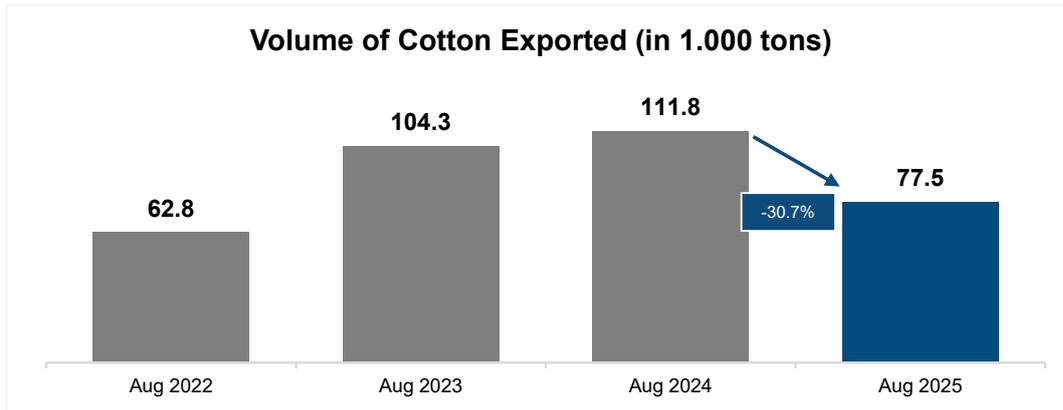
YIELD (kg/ha)	2020	2021	2022	2023	2024	2025*	24 vs. 23 (%)	25 vs. 24 (%)
SEED COTTON (Lint + Seed)	4,426	4,230	3,920	4,628	4,585	4,491	-0.9%	-2.1%
LINT (COTTON)	1,802	1,721	1,596	1,907	1,904	1,849	-0.2%	-2.9%

Source: Conab *Forecast: Abrapa (Jun 25)



4. EXPORT SHIPMENTS

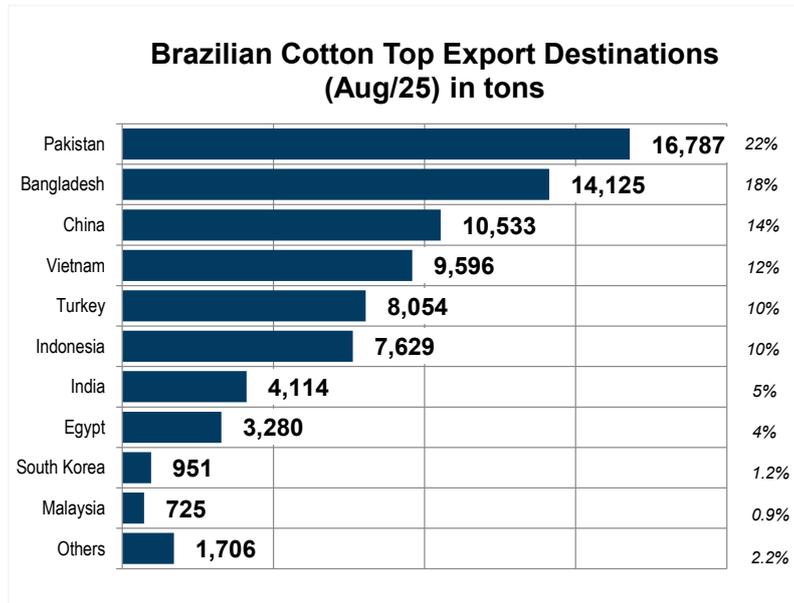
In August, Brazil exported **77.5 thousand tonnes** of cotton (-30.7% compared to the same month in 2024), generating **US\$ 123.5 million** in export revenues.



Source: ComexStat – MDIC, Sep/2025

In August, Brazil exported **16,787 tonnes** of cotton to **Pakistan** (22% of the total). Bangladesh imported 14,125 tonnes (18%) and China, 10,533 tonnes (14%).

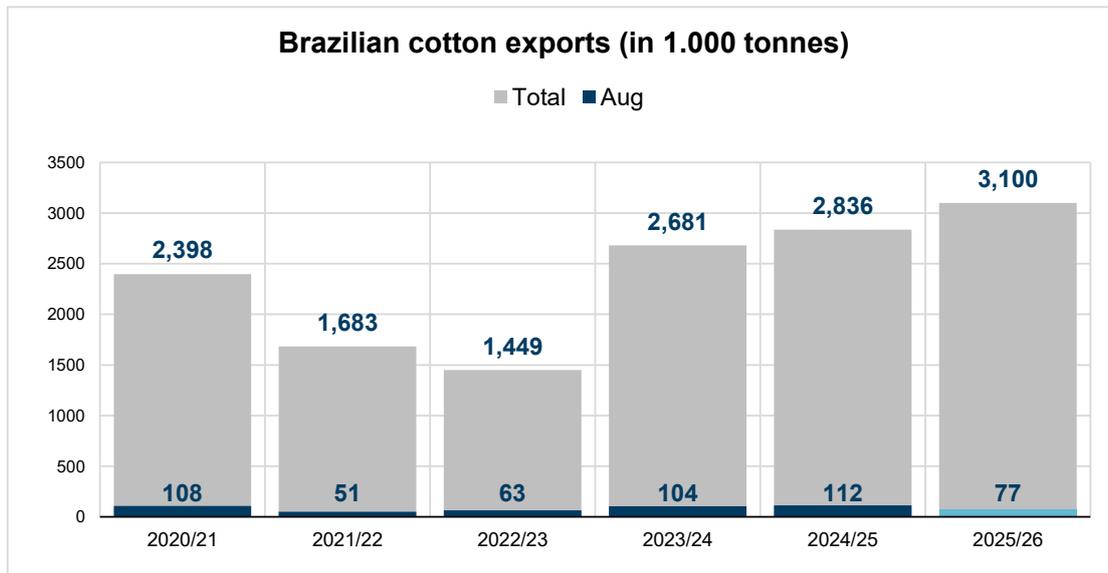
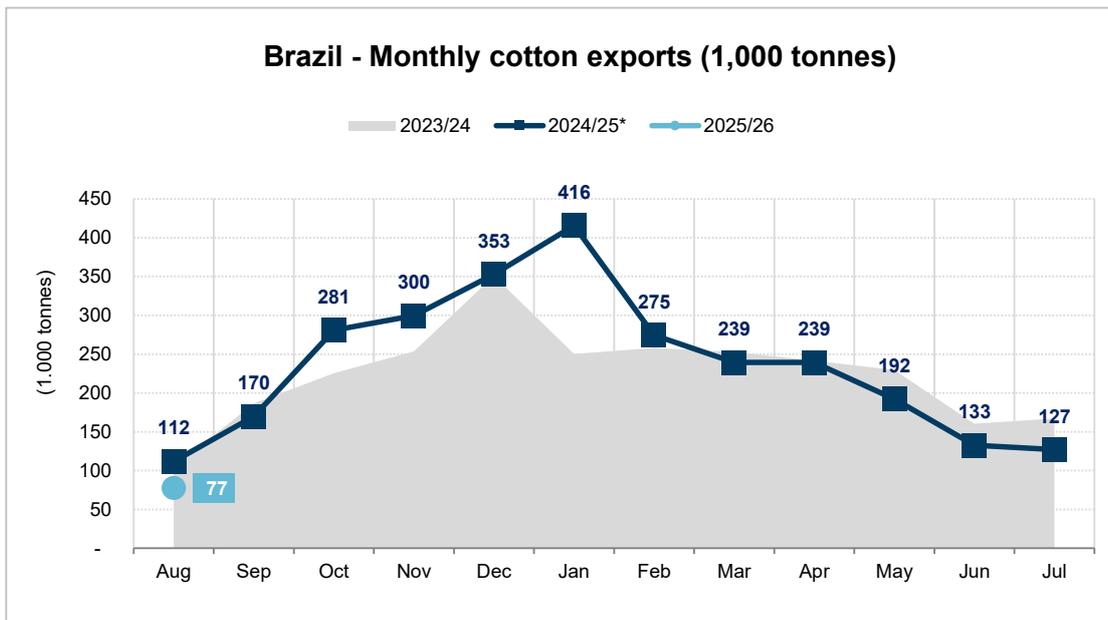
Together, these three countries accounted for **41,445 tonnes**, or 53% of total exports in the month.



Source: ComexStat – MDIC, Sep/2025



Exports of 77,500 tonnes of cotton in August, the first month of the 2024/25 marketing year, were **lower** than the volume recorded in **the same month of both the 2023/24 and the previous (2022/23) cycles.**

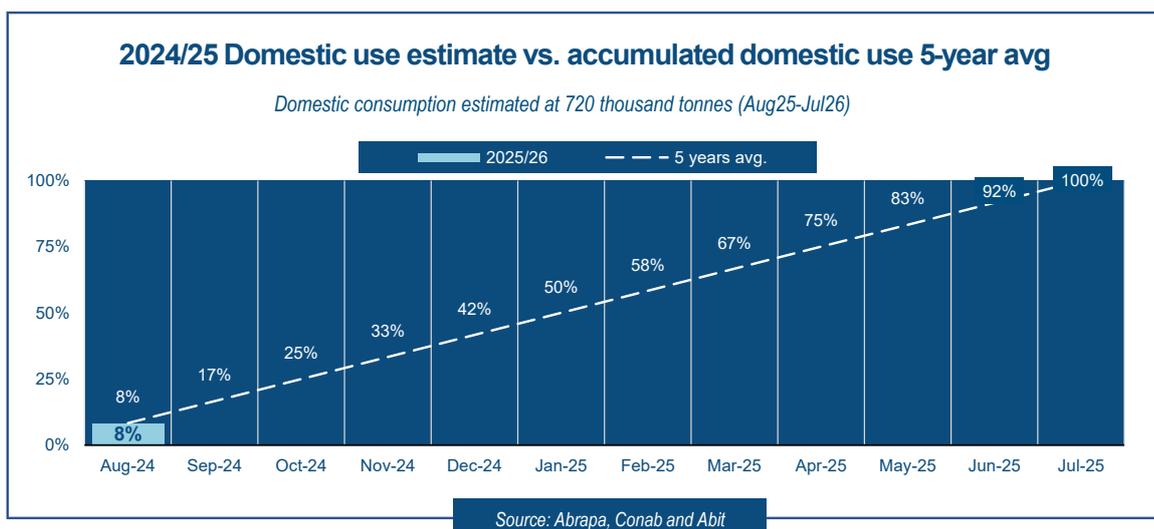
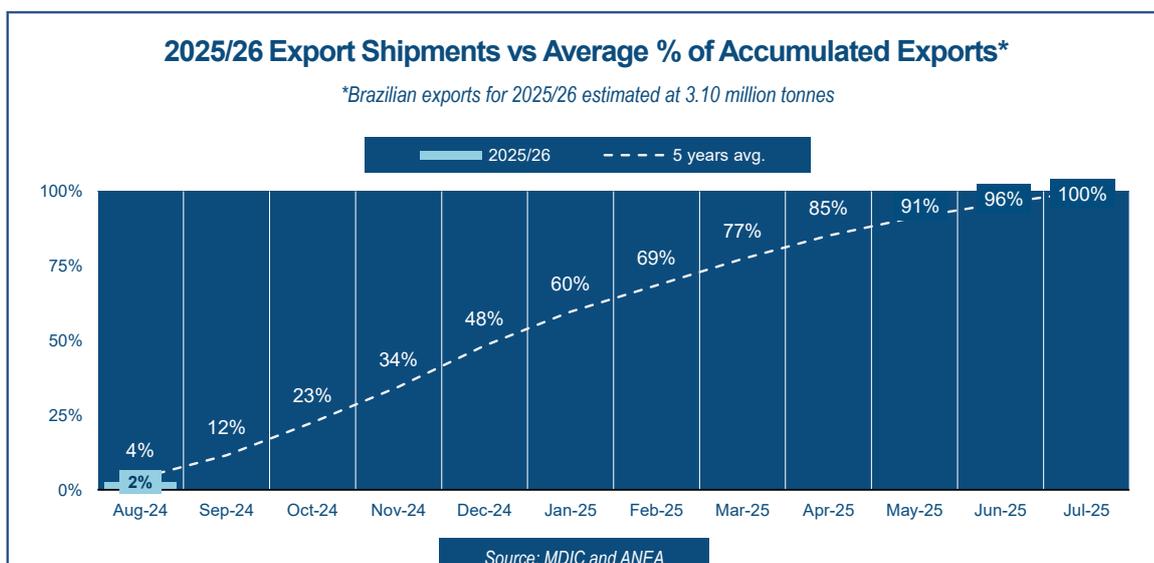


Source: ComexStat – MDIC, Sep/2025. [Market Year: August to July.] Rounded figures. *Forecast



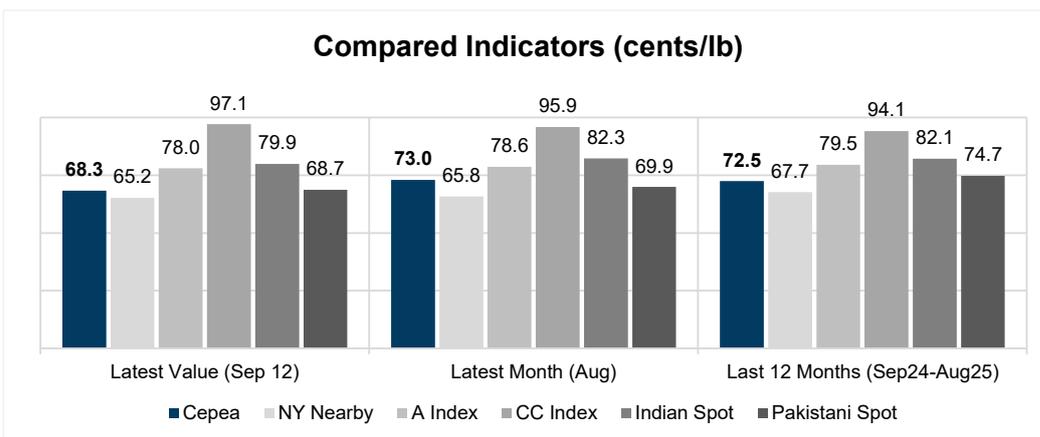
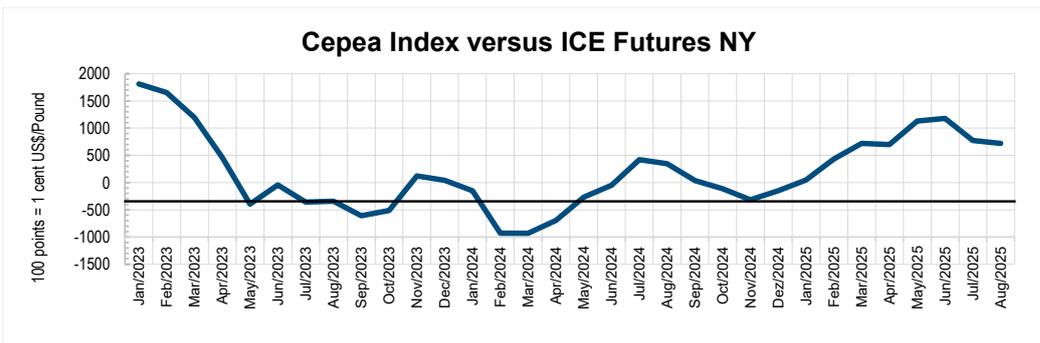
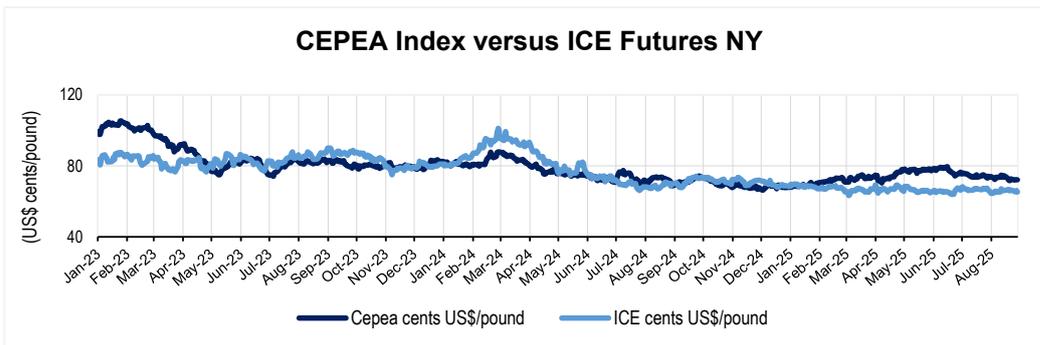
5. 2023/24 MARKET YEAR EXPORTS AND DOMESTIC USE

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 August, the Cepea/Esalq indicator dropped by 2.3% and closed the month at **72.08 US\$ cents per pound** while ICE prices dropped by 0.6% in the same month. Over the last 12 months, domestic prices have **risen 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

Brazilian cotton showcased to six textile nations

In August, 20 executives from leading global textile companies took part in the ninth Buyers Mission, organised annually by Abrapa. Over one week, representatives from Bangladesh, China, India, Pakistan, Türkiye, and Vietnam – countries that together account for 84% of Brazilian cotton exports – visited farms, gins, laboratories, and institutions across Brazil's three main cotton-producing states, gaining a complete overview of the country's production chain.

In Mato Grosso, responsible for 70% of Brazil's planted area, the group witnessed large-scale mechanised harvesting, bale traceability systems, and regenerative agriculture practices that enable production growth without expanding farmland. In Bahia, the focus was on quality at the largest cotton classing laboratory in Latin America, equipped with 16 HVI machines ensuring fibre uniformity, strength, and consistency.

The programme concluded in Goiás, where buyers observed precision agriculture and sustainable crop management. The combination of technology, quality assurance, and environmental responsibility reinforced Brazil's position as a competitive and reliable global supplier of high-quality cotton.



Brazil stands out at Expo Osaka

Brazilian cotton took centre stage at Expo Osaka 2025, where Abrapa presented the exhibition "Power of the Natural" in partnership with ApexBrasil. The exhibition highlighted the fibre's quality, sustainability, and cultural significance, featuring traditional *Baiana* clothing, a Renaissance lace dress for Martha Medeiros, and a judogi worn by judo medalist David Moura. Visitors also experienced traceable cotton in jeans, t-shirts, and jackets with QR codes showing the journey from farm to fashion.

The program honoured three Sino-Brazilian cotton-producing families and included a presentation of a custom-made shawl to Princess Kako of Akishino presented by cotton grower Alessandra Zanotto. Brazil also hosted the "Women who weave the future: from sustainability to innovation" panel, with leaders from Abrapa, Abapa, ApexBrasil, and Abit. Expo Osaka, which runs until 13 October, celebrates cultural and technological exchange. **Click to read more.**