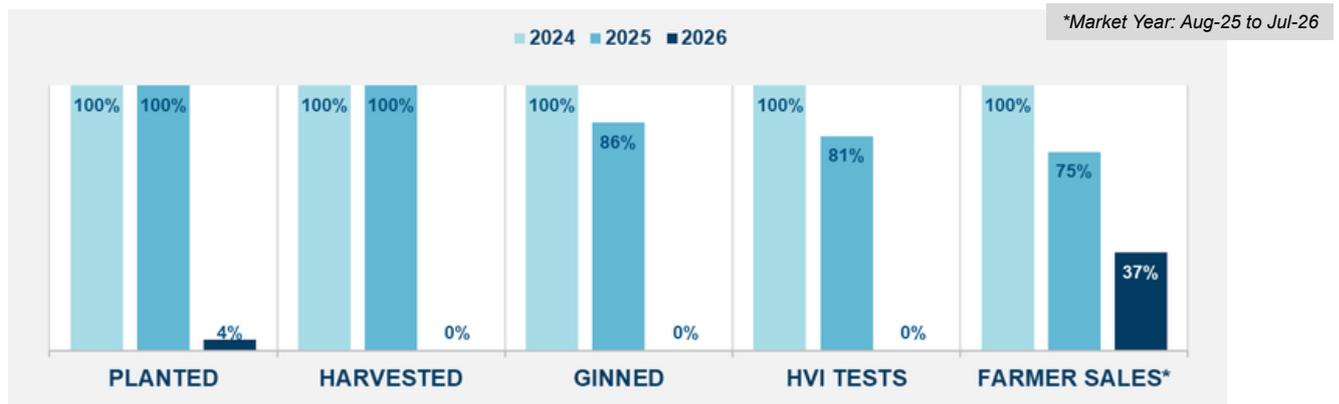




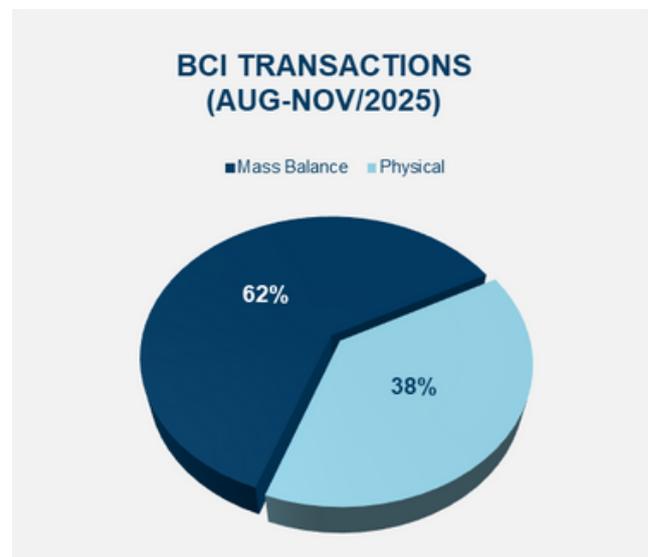
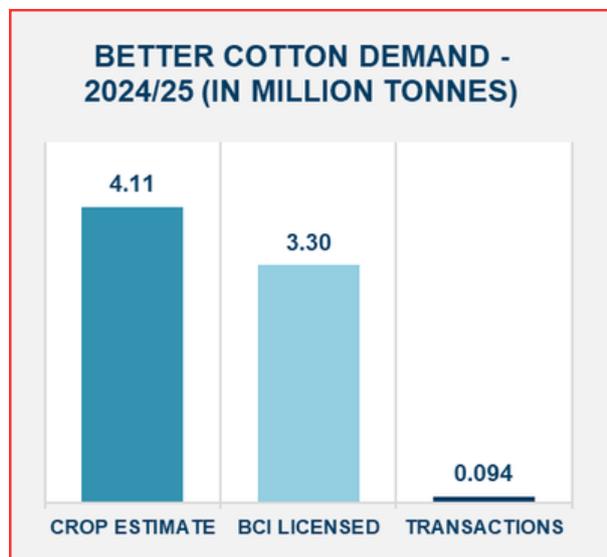
## 1. HIGH LIGHTS

- In November, Brazil exported **402.5 thousand tonnes** of cotton, bringing the total to **953 thousand tonnes** for the first four months of the 2025/26 marketing year. This marks **the best performance since 2020/21**.
- During the month, China, India and Bangladesh imported **244,474 tonnes**. In the cumulative total for 2025/26, these three countries accounted for **56% of the volume (534,087 tonnes)**.
- COP30: Abrapa highlights sustainable cotton" and the November Quality Report feature in the **"Made in Brazil"** section.

## 2. STATUS OF BRAZIL'S COTTON CROP



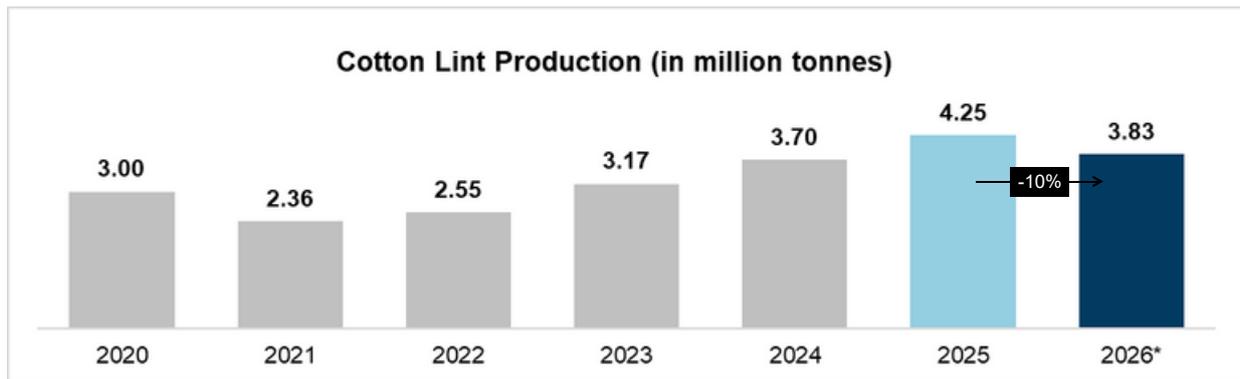
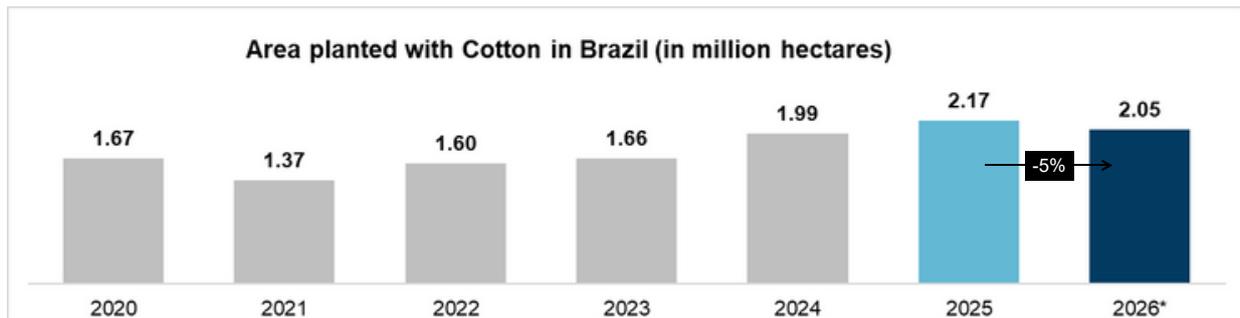
\* Percentage of cotton sold by growers to merchants





## 3. 2025 CROP

In its December update, Abrapa revised the 2026 planted area to 2.05 million hectares, a 5% drop compared to 2025. Consequently, production is now estimated at 3.83 million tonnes, down 10% year-on-year.



Source: Conab \*Forecast 2025: Abrapa (Dec 25)

Following the December data update, Brazil's average cotton yield for the 2026 crop is forecast at 1,866 kg/ha, representing a decrease of 4.7%.

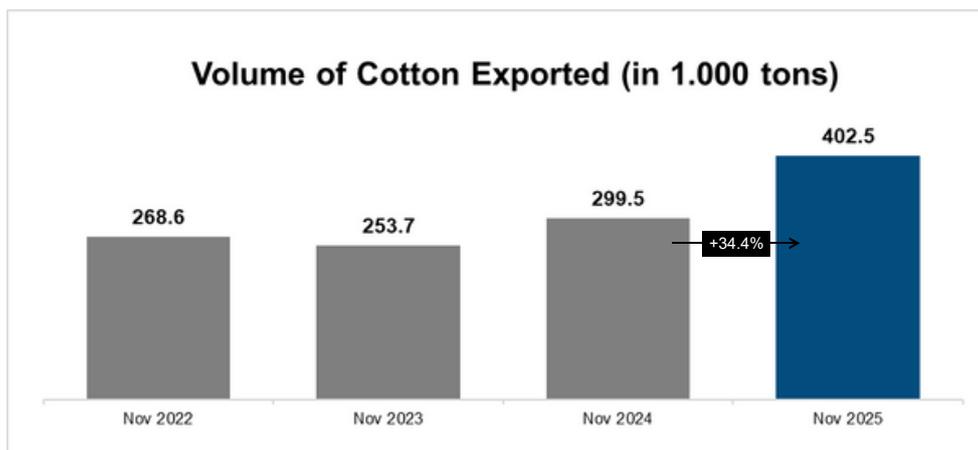
Brazilian Cotton Harvest								
PRODUCTION (million tons)	2021	2022	2023	2024	2025	2026*	25 vs. 24 (%)	26 vs. 25 (%)
SEED COTTON (lint + Seed)	5.80	6.27	7.70	8.91	10.32	9.30	15.8%	-9.9%
LINT (COTTON)	2.36	2.55	3.17	3.70	4.25	3.83	14.8%	-9.9%
YIELD (kg/ha)	2021	2022	2023	2024	2025	2026*	25 vs. 24 (%)	26 vs. 25 (%)
SEED COTTON (Lint + Seed)	4,230	3,920	4,628	4,584	4,753	4,531	3.6%	-4.7%
LINT (COTTON)	1,721	1,596	1,907	1,904	1,958	1,866	2.8%	-4.7%

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



## 4. EXPORT SHIPMENTS

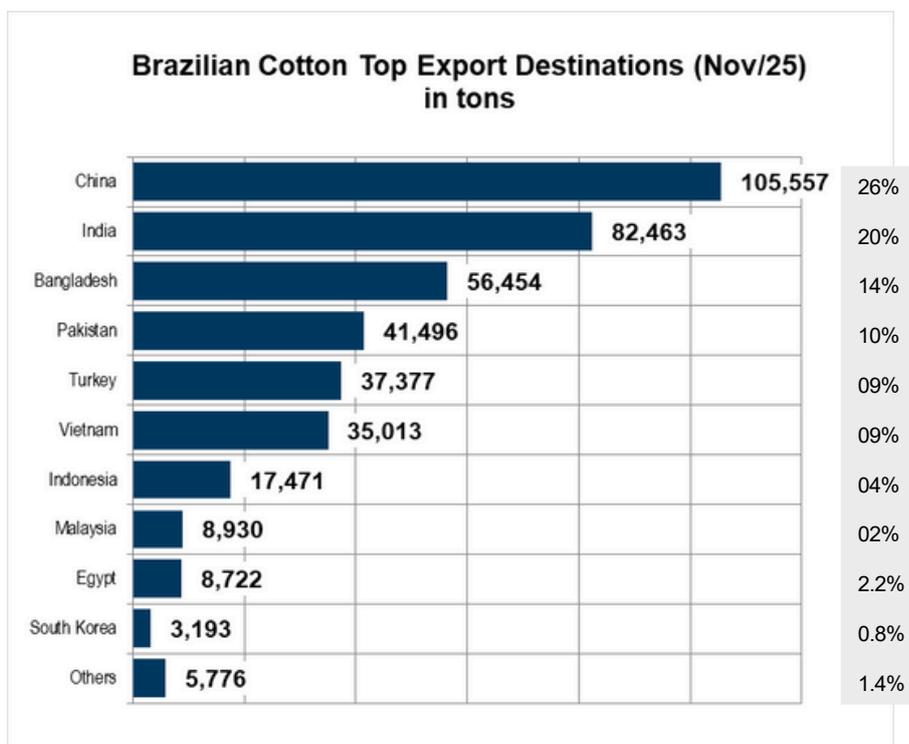
In November, Brazil exported **402.5 thousand tonnes** of cotton (**up 34.4%** compared to the same month in 2024), generating **US\$ 640.1 million** in export revenue.



Source: ComexStat – MDIC, Dec/2025

In November, Brazil shipped **105,557 tonnes** to China (26% of the total). India took **82,463 tonnes** (20%), followed by Bangladesh with **56,454 tonnes** (14%).

Together, these three countries accounted for **244,474 tonnes, or 61% of total exports** for the month.



Source: ComexStat – MDIC, Dec/2025

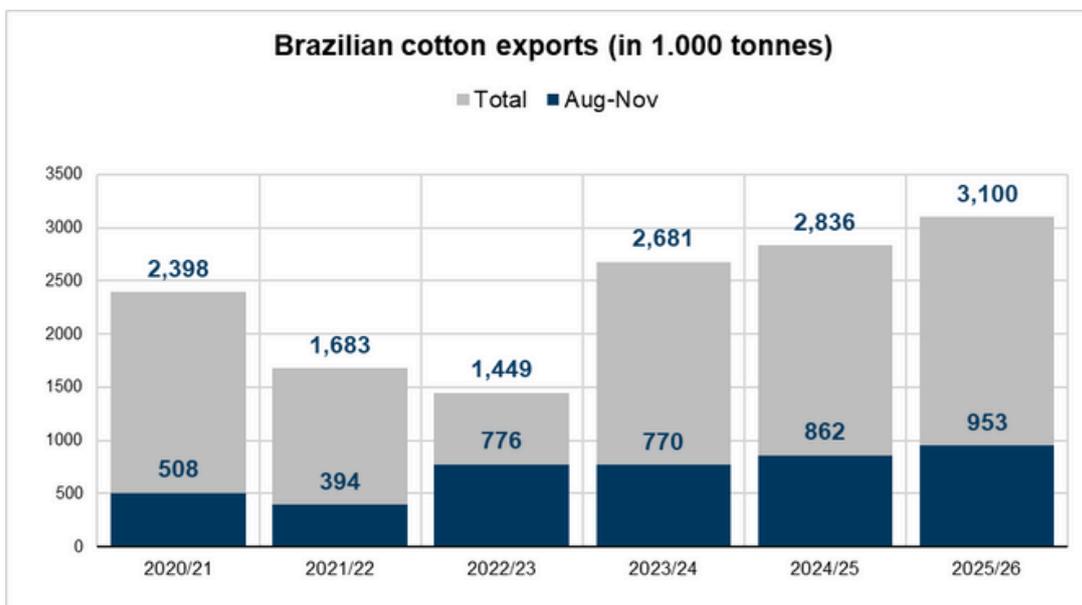
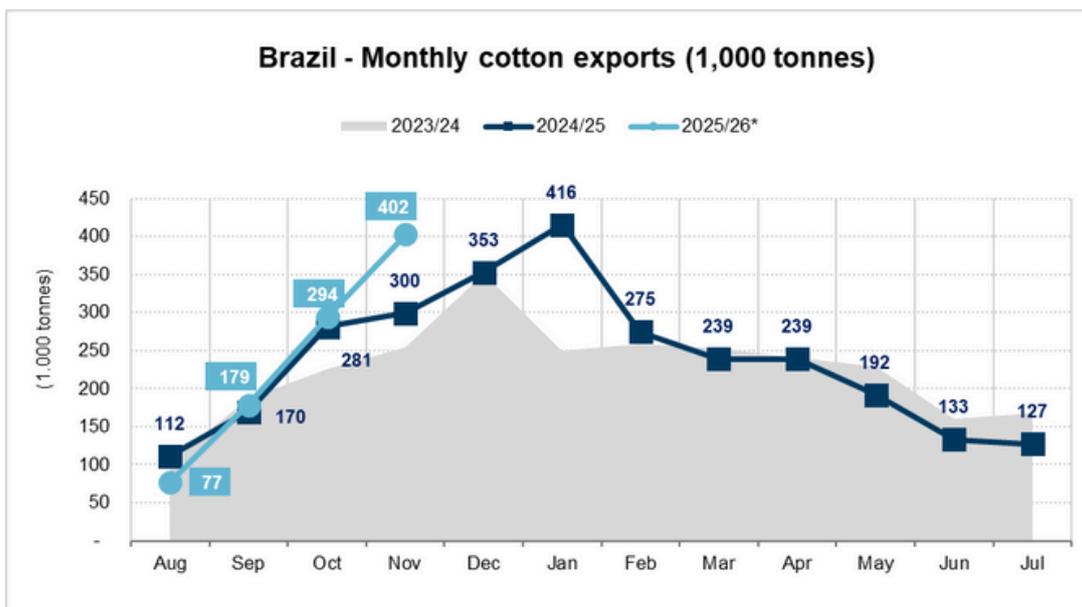


# Cotton Brazil market report

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

Ed. 56  
December 12<sup>th</sup> 2025

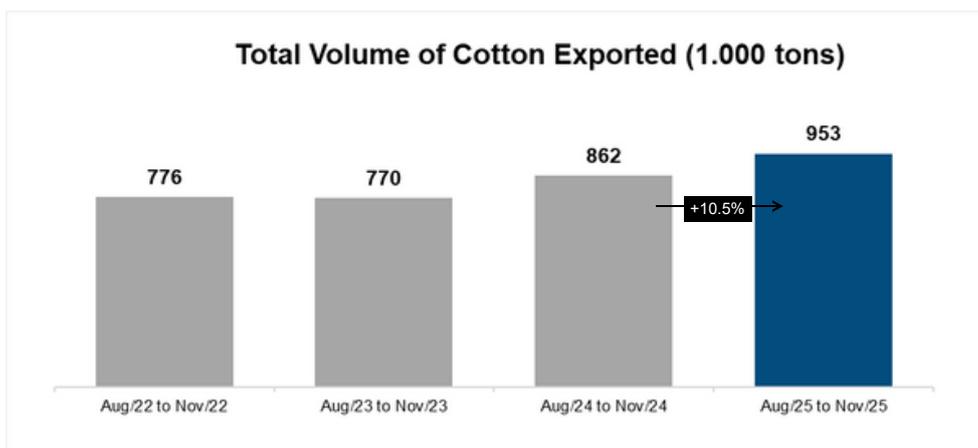
Exceeding figures from the previous two crops for the third month in a row, the 2025/26 cycle is now recording its best performance for the first four months of the market year since 2020/21.



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



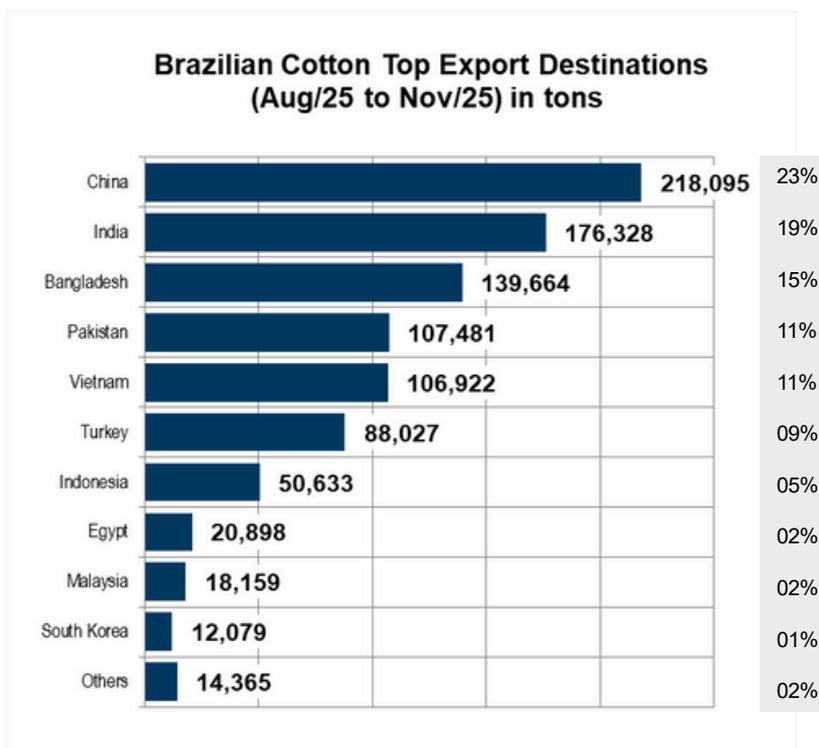
In the first four months of the 2025/26 marketing year, Brazil exported **953 thousand tonnes** of cotton, **10.5% more** than in the same period of 2024/25.



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

From August to November 2025, China imported **218,095 tonnes** of Brazilian cotton (23% of the total). India ranked second (**176,328 tonnes**; 19%), followed by Bangladesh (**139,664 tonnes**; 15%).

Combined, these three countries accounted for **534,087 tonnes**, representing **56% of total** exports in the 2025/26 marketing year.

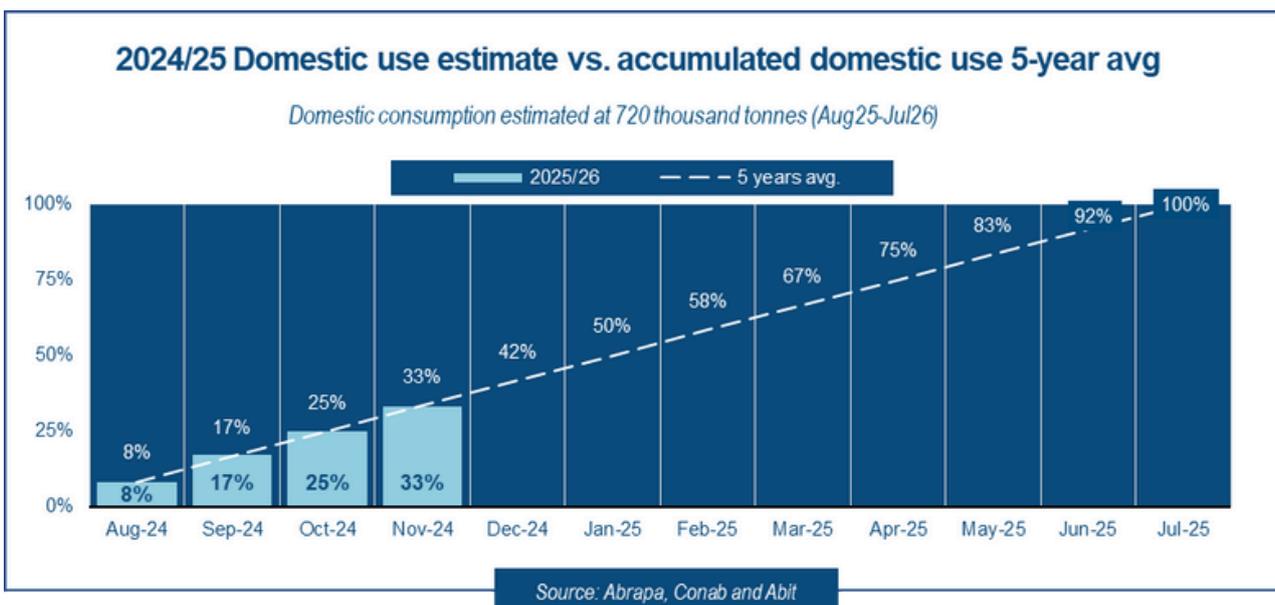


Source: ComexStat – MDIC, Dec/2025. [Market Year: August to July]



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

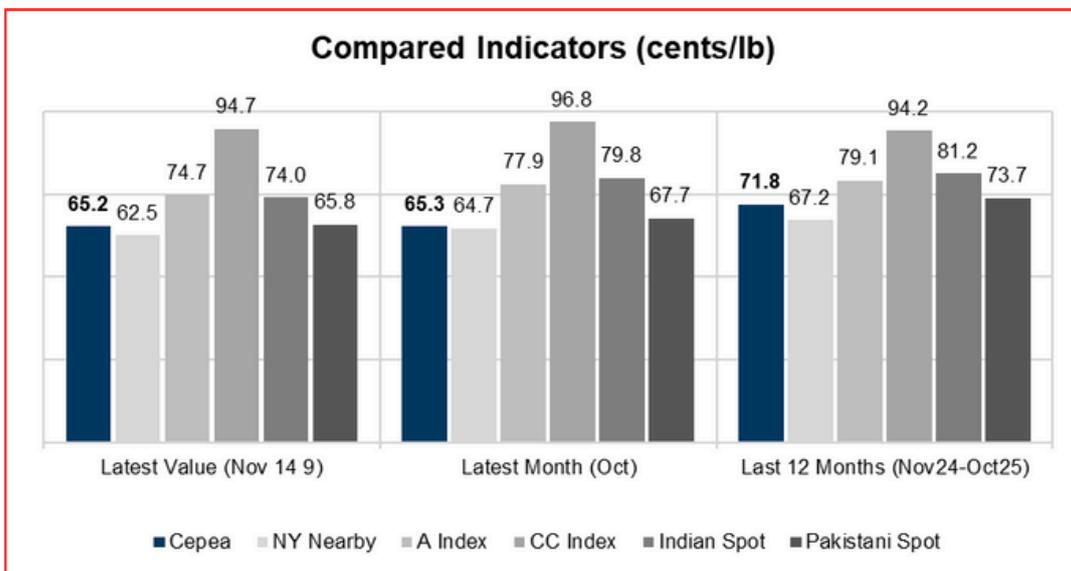
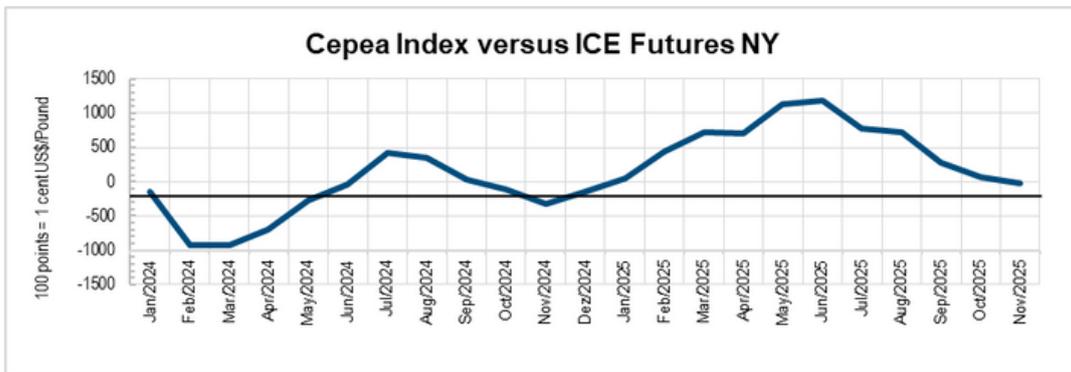
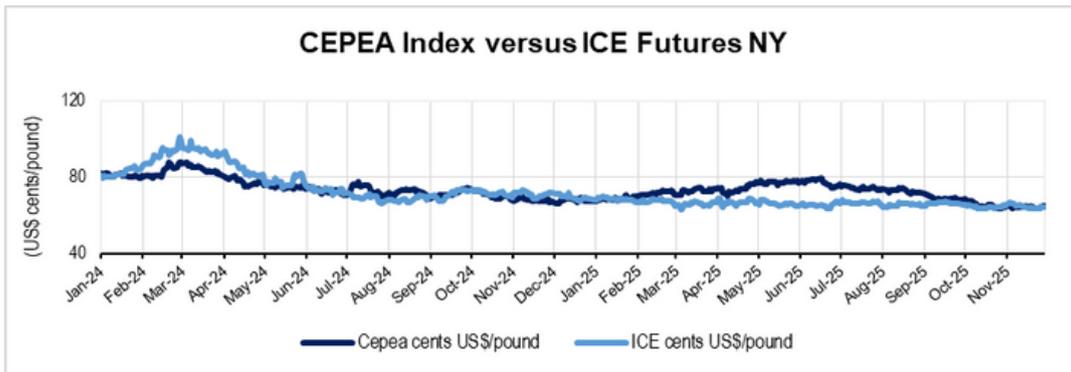
The charts below compare the performance of the current market year (2025/26) with the average Brazilian cotton exports over the last five years and the average volume for domestic use in Brazil also over the last five years.





## 6. PRICES

The Cepea/Esalq Indicator increased 0.7% in November, ending the month at 65.23 US cents/lb, in contrast to a 1.3% drop in ICE prices. Year-on-year, domestic prices are down 3.6%.



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



### COP30: Abrapa highlights sustainable cotton

During COP30 in Belém, Abrapa joined forces with the wider agricultural sector to present a unified position. The association supported the Brazilian Tropical Agriculture Forum in launching the paper “Sustainable Tropical Agriculture”. This strategic document advocates for the central role of tropical nations in global food and energy security, outlining eight guiding principles that prioritise science, technology, and the integration of high-yield production with native vegetation preservation.

The agenda highlighted the Responsible Brazilian Cotton (ABR) programme as a global benchmark for sustainability. Currently certifying 83% of the country's cotton farms, the initiative is audited by international bodies and verifies 195 specific items, ranging from strict labour compliance to water stewardship and biodiversity conservation.

This commitment has firmly positioned Brazil as a leader in the supply of responsible cotton, accounting for nearly half of the world's socio-environmentally certified fibre in the 2023/2024 crop season.

Central to the debates was the positioning of cotton as a competitive, traceable option in the global textile mix, effectively connecting the field to the consumer. The sector emphasised that modern sustainability goes beyond farm gates; it requires robust traceability systems that allow brands and retailers to verify the origin of their materials.

By guaranteeing the provenance of the fibre, Brazil offers a secure solution for companies aiming to reduce their environmental footprint and meet increasingly demanding market regulations.



The association also drew a sharp contrast between natural fibres and man-made alternatives. Data presented at the event showed that synthetic fabrics, such as polyester, emit 80% more greenhouse gases than natural options and release microplastics found in oceans and even the human body.

Abrapa argues that transforming the textile industry requires joint action: public policies must encourage sustainable production, while consumers are urged to consider the true environmental cost of their choices.



### **Just released: November quality report**

*The November figures confirm the consistent quality of the crop, delivering fibres aligned with the needs of the global textile industry. Access the full report here.*