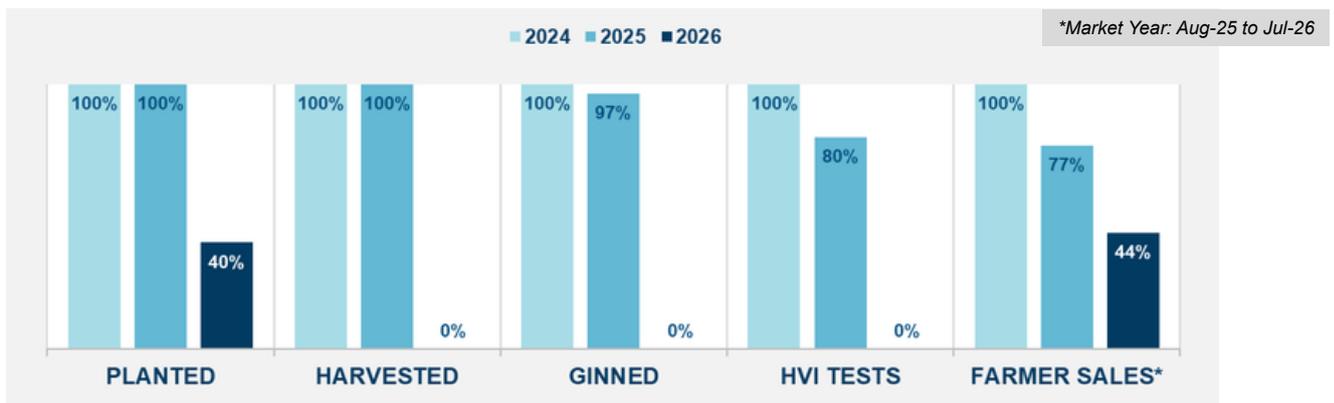




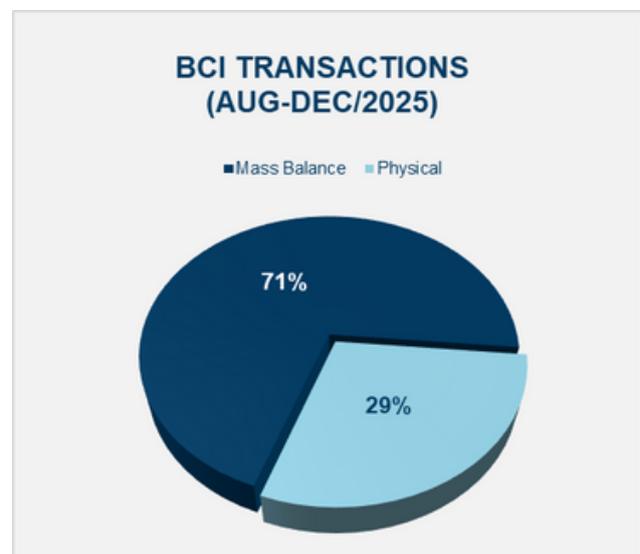
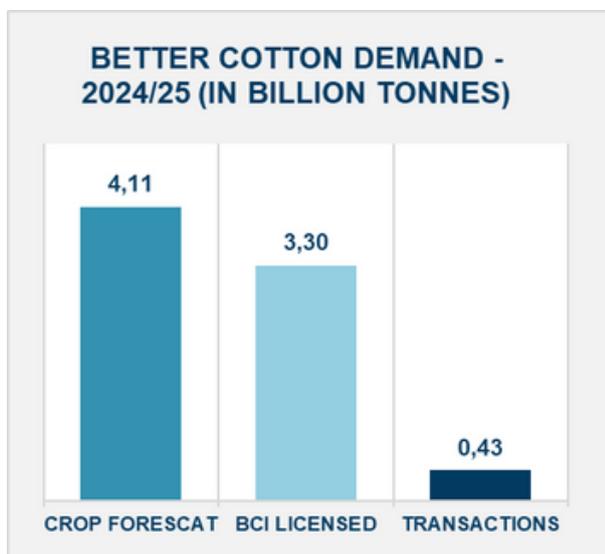
## 1. HIGH LIGHTS

- In December, Brazil exported **452.5 thousand tonnes** of cotton, bringing the total to **1.405 million tonnes** for the first five months of the 2025/26 marketing year. This performance marks an **all-time high** for the August-December period in history.
- China, Bangladesh and Turkey imported **300,466 tonnes** in December 2025. In the cumulative total for 2025/26, these three countries accounted for **55% of the volume (770,715 tonnes)**.
- "Abrapa and BCI partnership renewed until 2028" and the December Quality Report : see it in the **"Made in Brazil"** section.

## 2. STATUS OF BRAZIL'S COTTON CROP



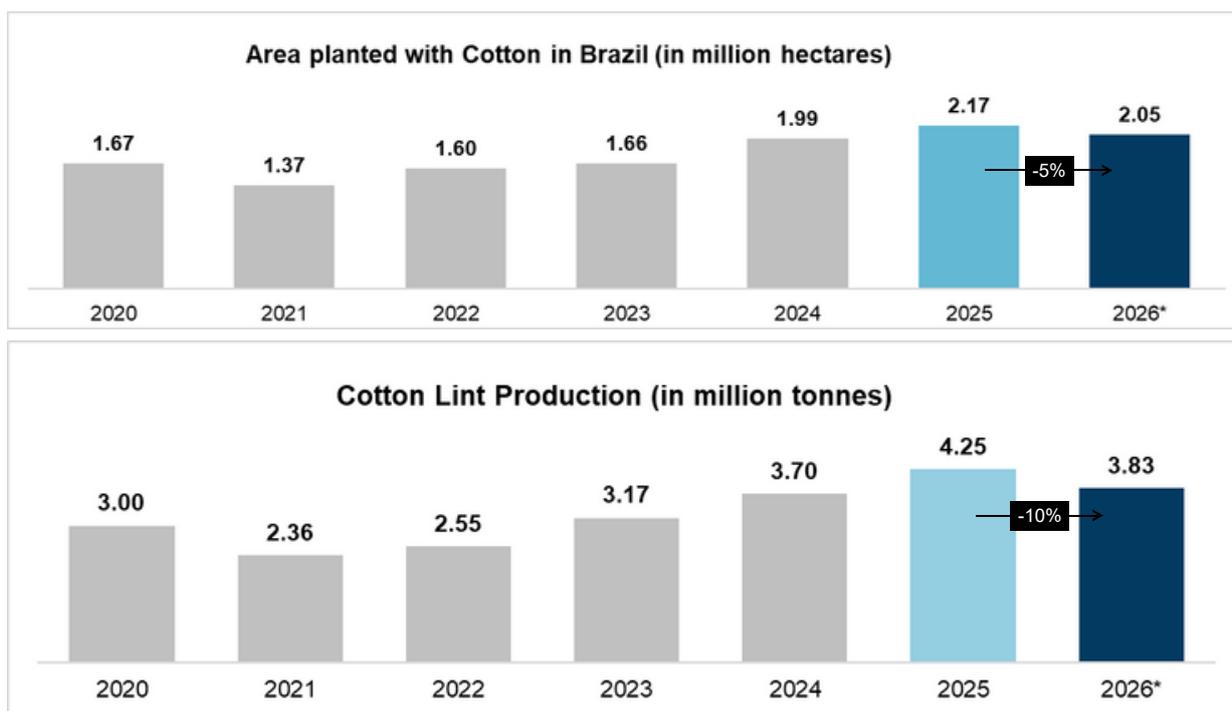
\* Percentage of cotton sold by growers to merchants





## 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%.

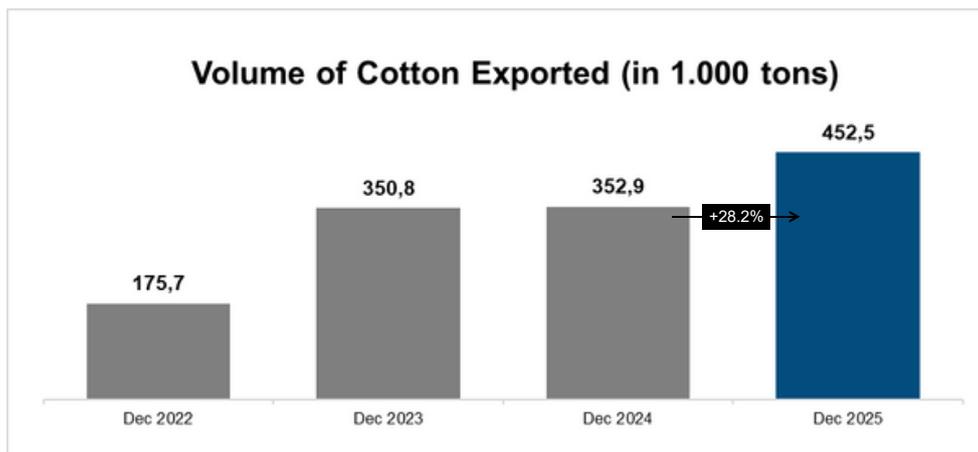
Brazilian Cotton Harvest								
PRODUCTION (million tons)	2021	2022	2023	2024	2025	2026*	25 vs. 24 (%)	26 vs. 25 (%)
SEED COTTON (lint + Seed)	5.80	6.27	7.70	8.91	10.32	9.30	15.8%	-9.9%
LINT (COTTON)	2.36	2.55	3.17	3.70	4.25	3.83	14.8%	-9.9%
YIELD (kg/ha)	2021	2022	2023	2024	2025	2026*	25 vs. 24 (%)	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

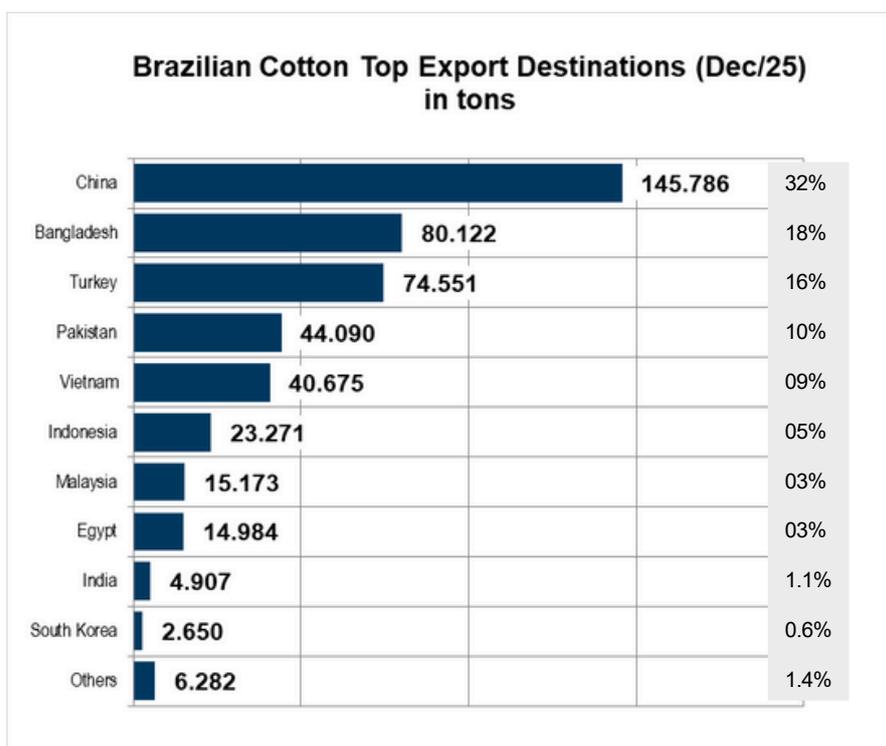
In December, Brazil exported **452,5 thousand tonnes** of cotton (**up 28.2%** compared to the same month in 2024), generating **US\$ 707.4 million** in export revenue.



Source: ComexStat – MDIC, Jan/2026

In December, Brazil shipped **145.786 tonnes** to China (32% of the total). Bangladesh took **80.122 tonnes** (18%), followed by Turkey with **74.551 tonnes** (16%).

Together, these three countries accounted for **300.466 tonnes, or 66% of total exports** for the month.



Source: ComexStat – MDIC, Jan/2026

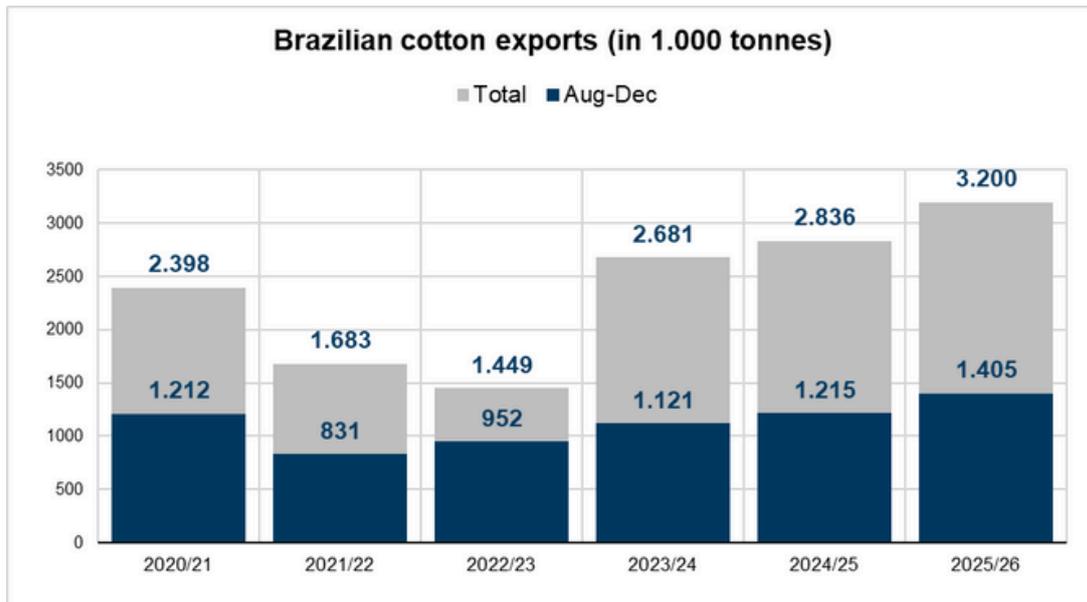
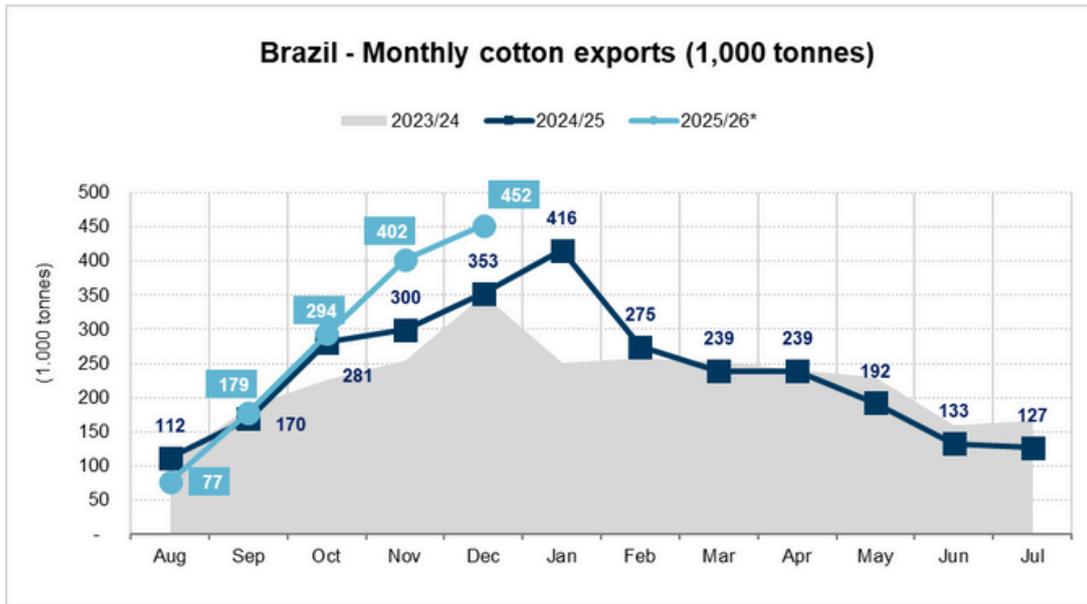


# Cotton Brazil market report

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

Ed. 57  
January 15<sup>th</sup> 2026

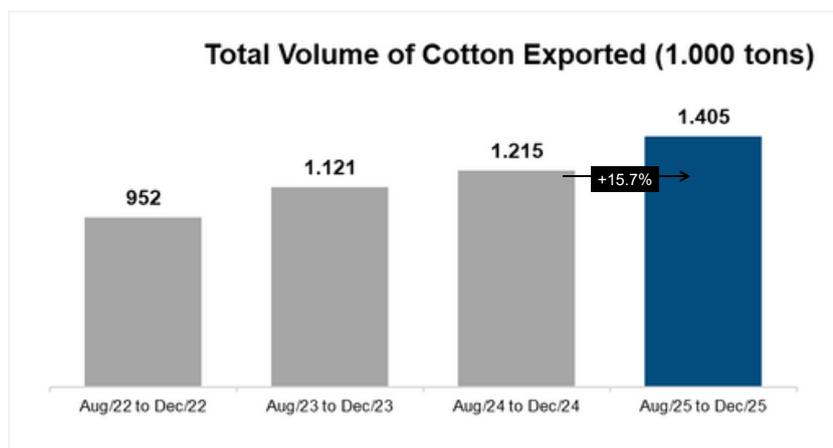
Following December's results, Brazil reached a historical peak in cotton exports for the first five months of the marketing year (Aug/Dec).



Source: ComexStat – MDIC, Jan/2026. [Market Year: August to July.] Rounded figures. \*Forecast



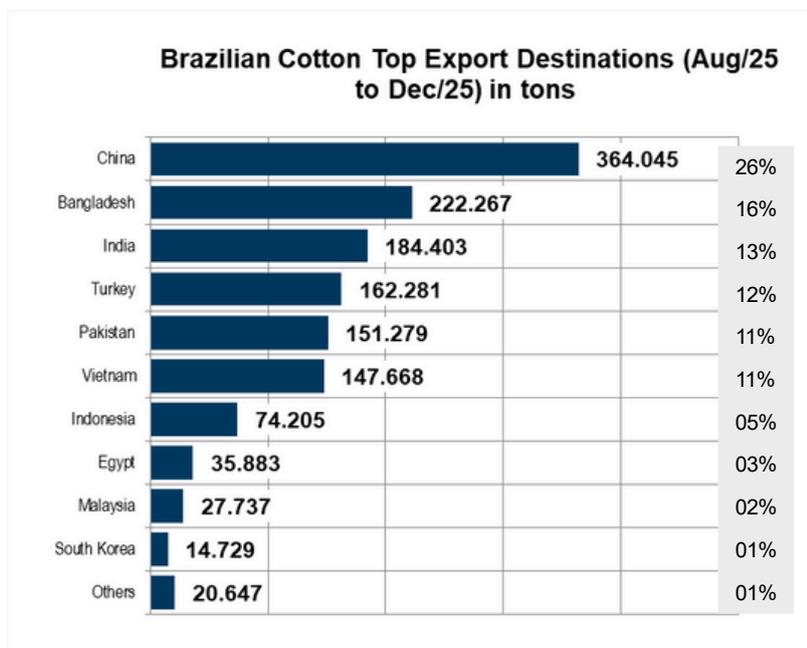
In the first five months of the 2025/26 marketing year, Brazil exported **1.405 thousand tonnes** of cotton, **15.7% more** than in the same period of 2024/25.



Source: ComexStat – MDIC, Jan/2026. [Market Year: August to July]

From August to December 2025, China imported **364.045 tonnes** of Brazilian cotton (26% of the total). Bangladesh ranked second (**222.267 tonnes**; 16%), followed by India (**184.403 tonnes**; 13%).

Combined, these three countries accounted for **770.715 tonnes**, representing **55% of total exports** in the 2025/26 marketing year.

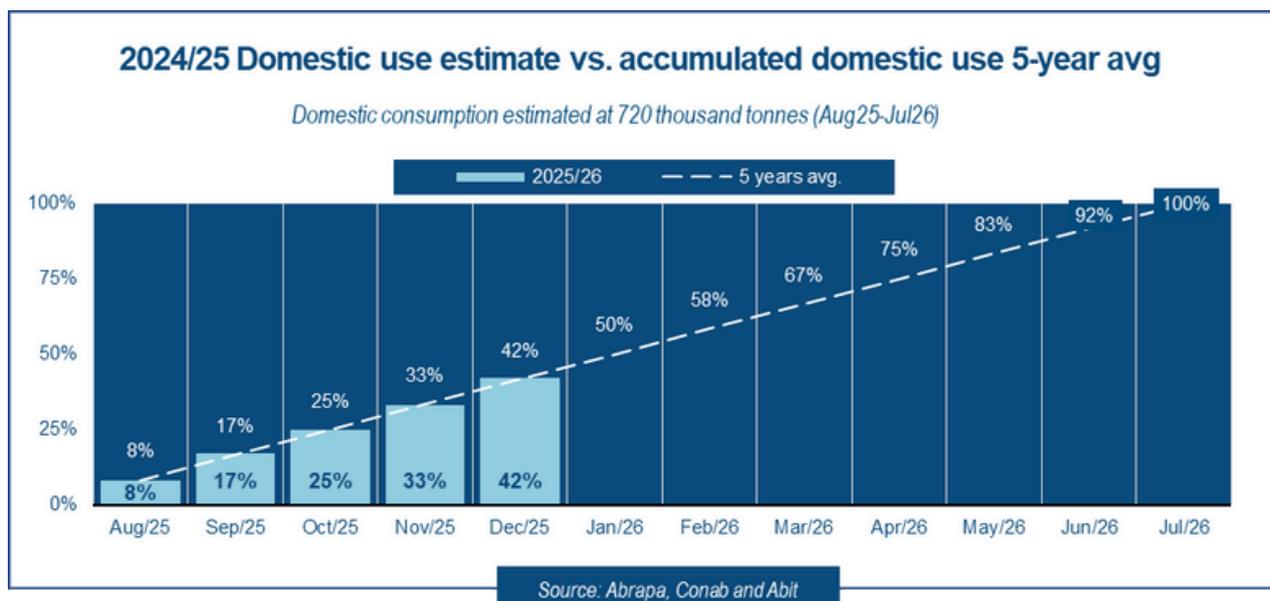


Source: ComexStat – MDIC, Jan/2026. [Market Year: August to July]



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

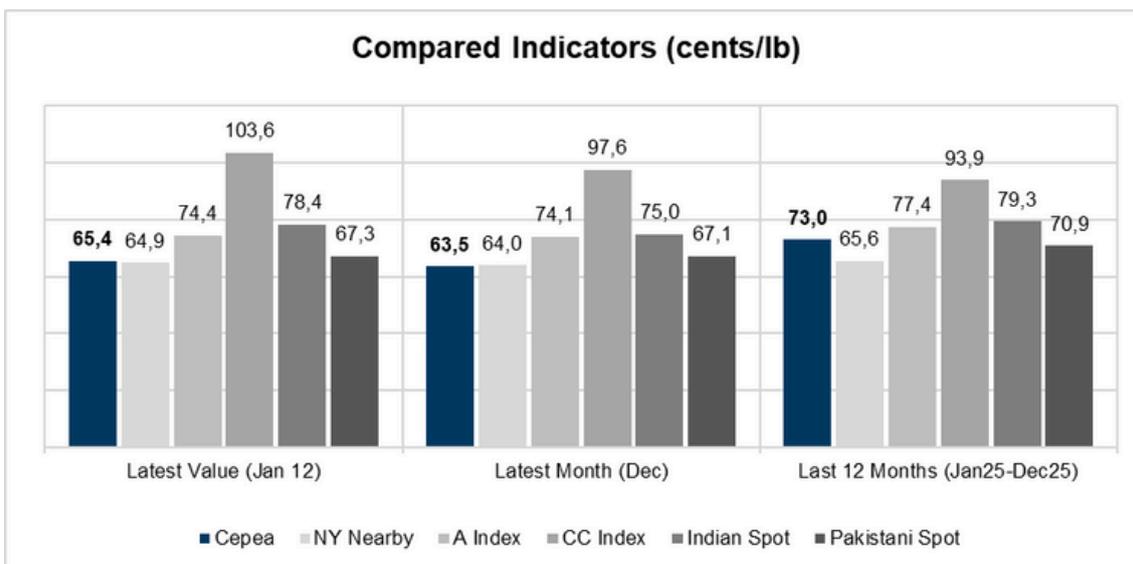
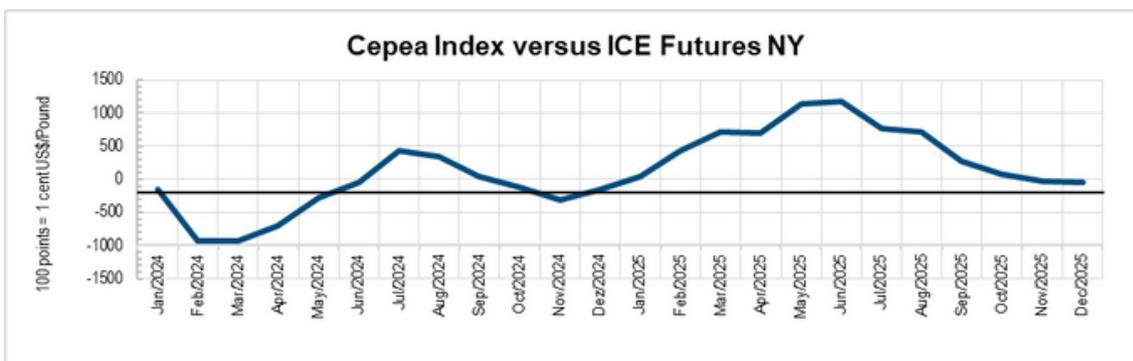
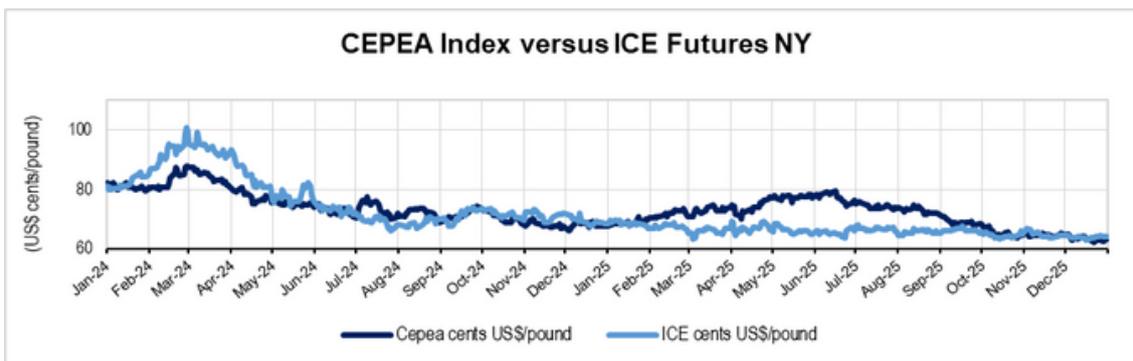
The charts below compare the performance of the current market year (2025/26) with the average Brazilian cotton exports over the last five years and the average volume for domestic use in Brazil also over the last five years.





## 6. PRICES

The Cepea/Esalq Indicator dropped 2.6% in December, while ICE prices decreased 0.7%. Year-on-year, both domestic and international prices ended lower, down 6.4% and 6.0% respectively.



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

## Abrapa and BCI partnership renewed until 2028

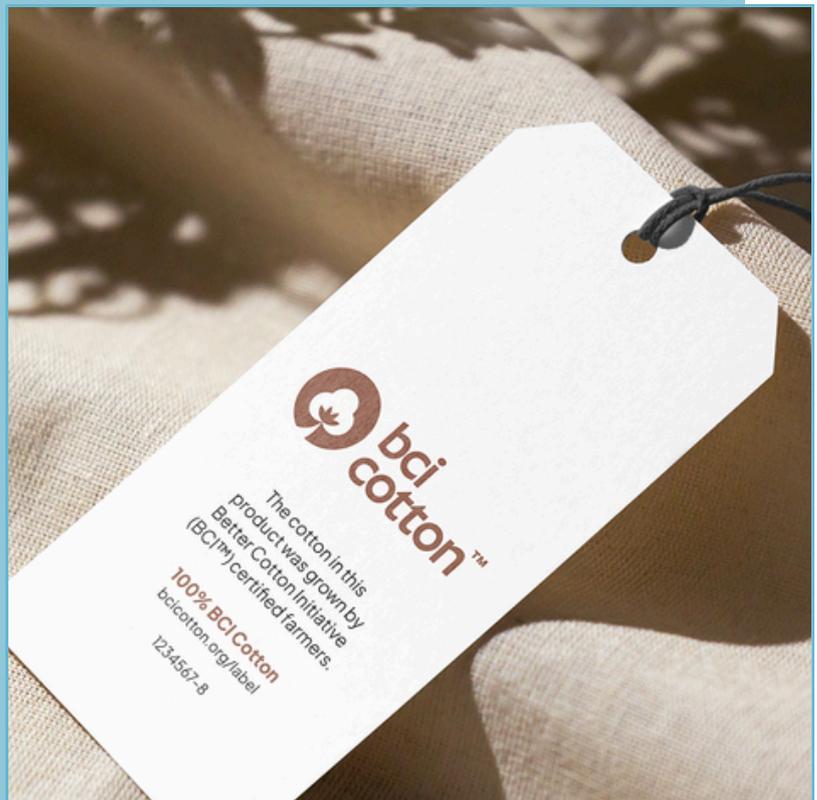
Abrapa and the Better Cotton Initiative (BCI) renewed the benchmarking agreement between the Responsible Brazilian Cotton (ABR) program and the Better Cotton Standard System (BCSS) in December.

The partnership, which began in 2014, has now been extended through 2028.

With the continuity of this strategic alliance, Brazilian producers will be able to continue supplying significant volumes of BCI-licensed cotton over the next few years.

The ABR program audits verify social, environmental, and good agriculture practice criterias. The protocol features 180 verification items, including the proper management of natural resources, fair working conditions, legal compliance, and the implementation of continuous improvement practices.

The program is led by Abrapa in partnership with state associations, which guide producers through every stage of the process.



### Now available: December quality update

The latest figures highlight consistent improvements across the primary physical and technological parameters of Brazilian cotton fiber. Read the full report.