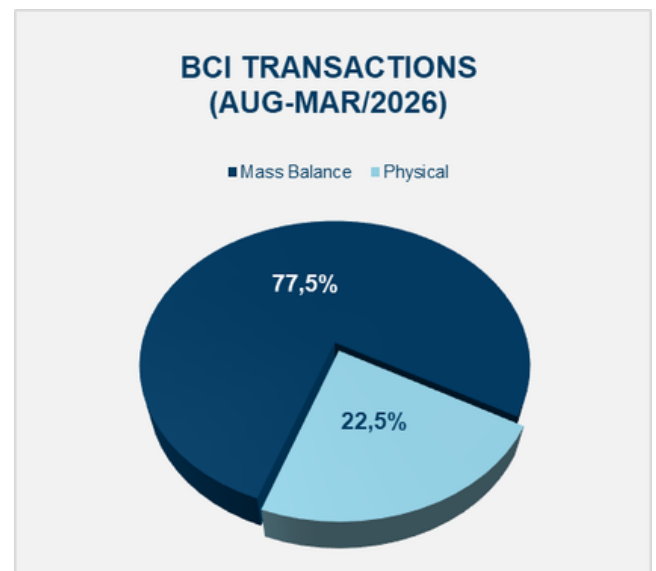
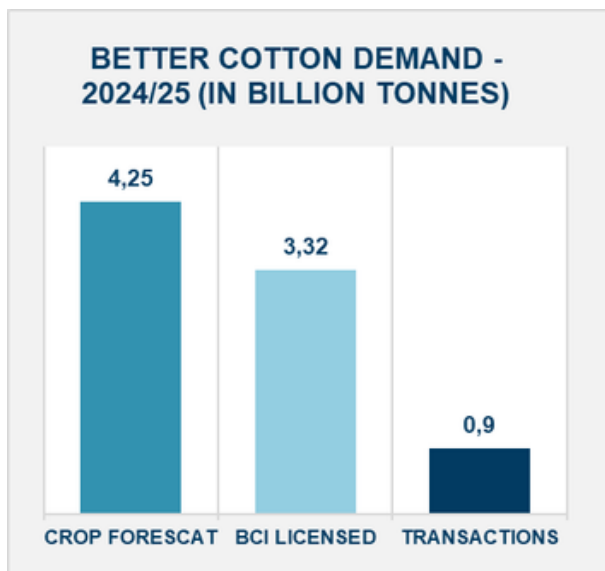
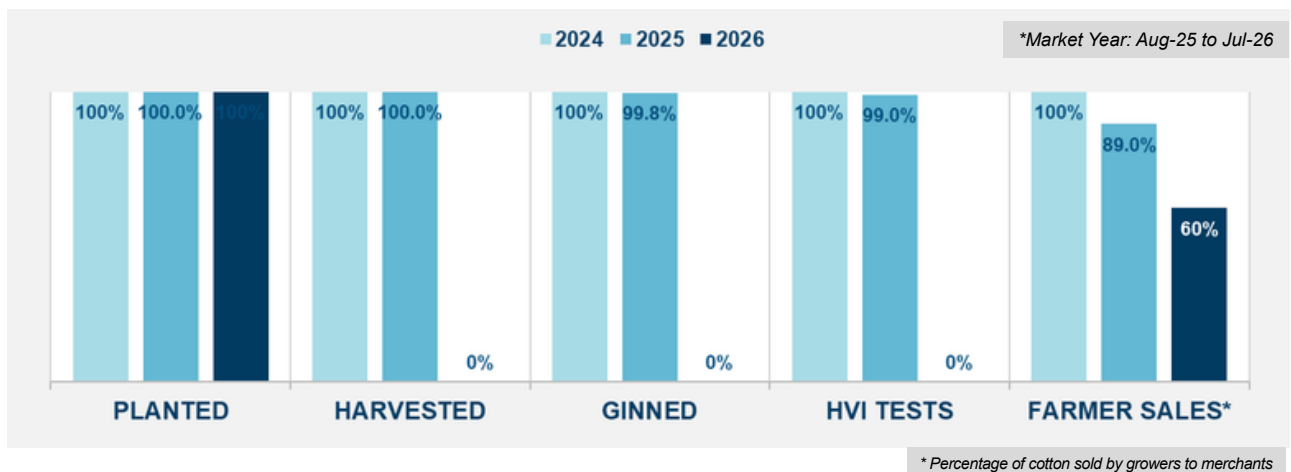




## 1. HIGHLIGHTS

- In February, Brazil exported **270.5 thousand** tonnes, bringing the total to **1,992.5 thousand tonnes** in the first seven months of the 2025/26 marketing year. Between Aug-25 and Feb-26, exports **increased 4.6%** compared with the same period in 2024/25.
- China, Turkey and Bangladesh imported **173.0 thousand** tonnes in February 2026. In the cumulative total for 2025/26, these three countries accounted for **57%** of the volume (**1,134.9 thousand tonnes**).
- **Made in Brazil:** Cotton Brazil's **mission to India** strengthened ties with the country's textile industry and expanded opportunities for Brazilian cotton.

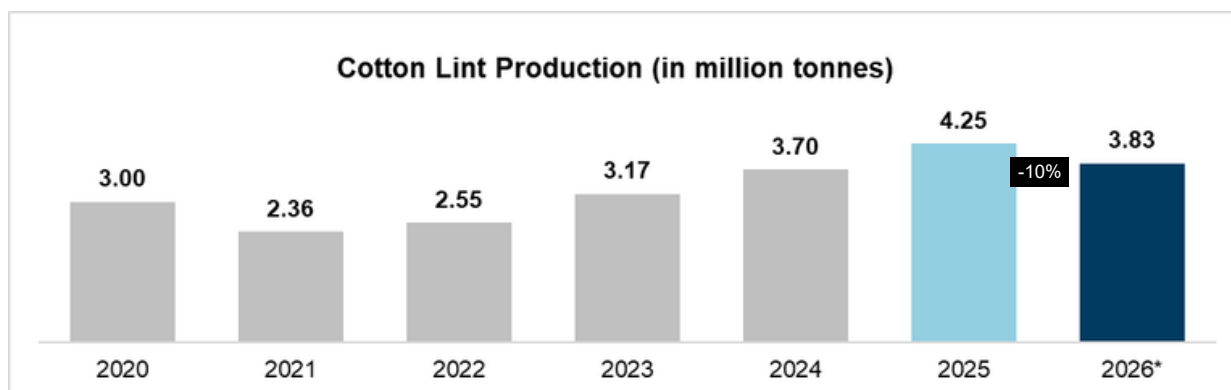
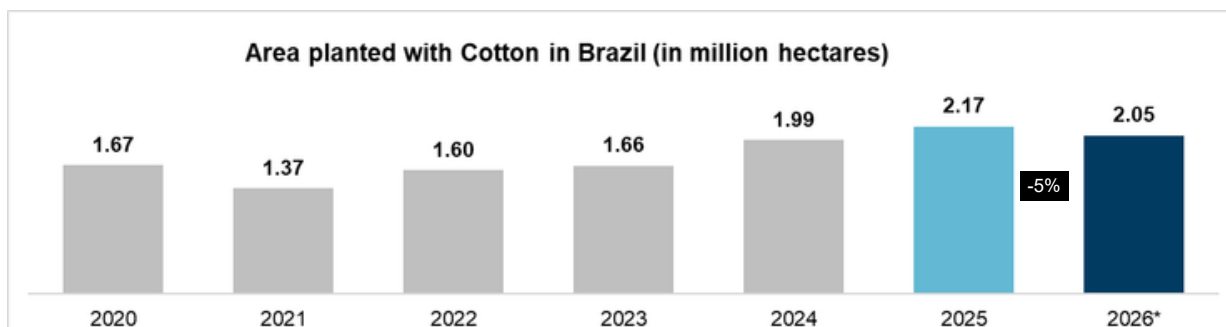
## 2. STATUS OF BRAZIL'S COTTON CROP





## 3. 2025 CROP

In its March 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 (Mar 26)

Following the December data update, Brazil's average cotton yield for the 2026 crop is forecast at 1,865 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%

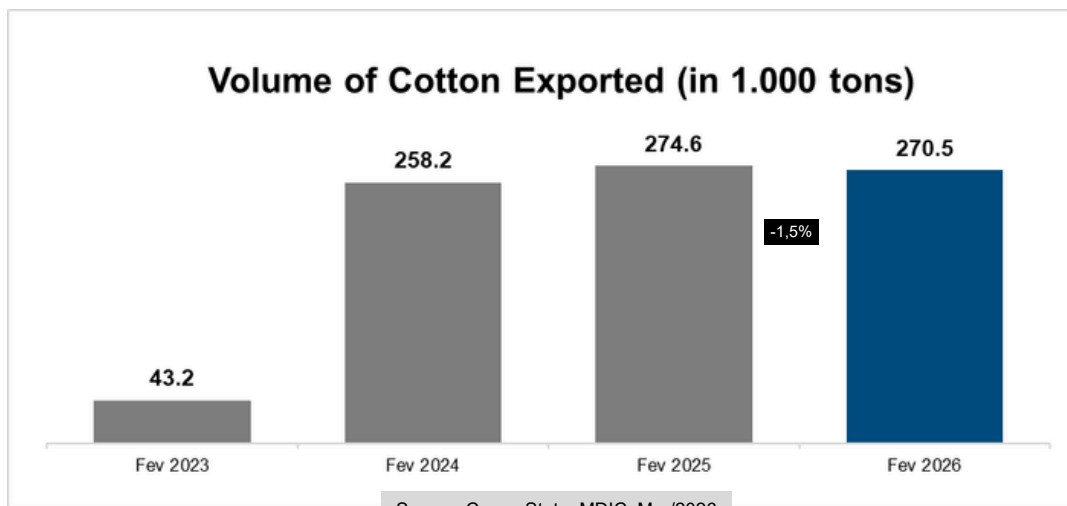
  

YIELD (kg/ha)	2021	2022	2023	2024	2025	2026*	25 vs. 24 (%)	26 vs. 25 (%)
SEED COTTON (Lint + Seed)	4,230	3,920	4,628	4,584	4,753	4,530	3.6%	-4.7%
LINT (COTTON)	1,721	1,596	1,907	1,904	1,958	1,865	2.8%	-4.7%



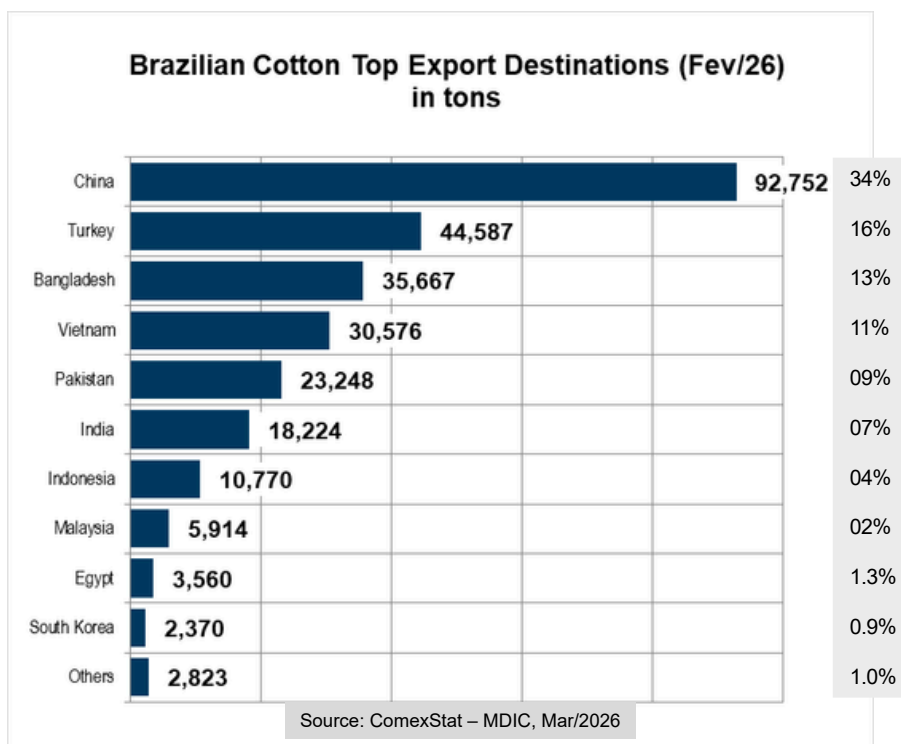
## 4. EXPORT SHIPMENTS

In February, Brazil exported **270.5 thousand tonnes** of cotton, a **1.5% drop** compared to the same month in 2025, generating **US\$ 413 million** in export revenue.



In February, Brazil shipped **92,752 tonnes** to China (34% of the total). Turkey took **44,587 tonnes** (16%), followed by Bangladesh with **35,667 tonnes** (13%).

Together, these three countries accounted for **173,006 tonnes, or 64% of total exports** for the month.



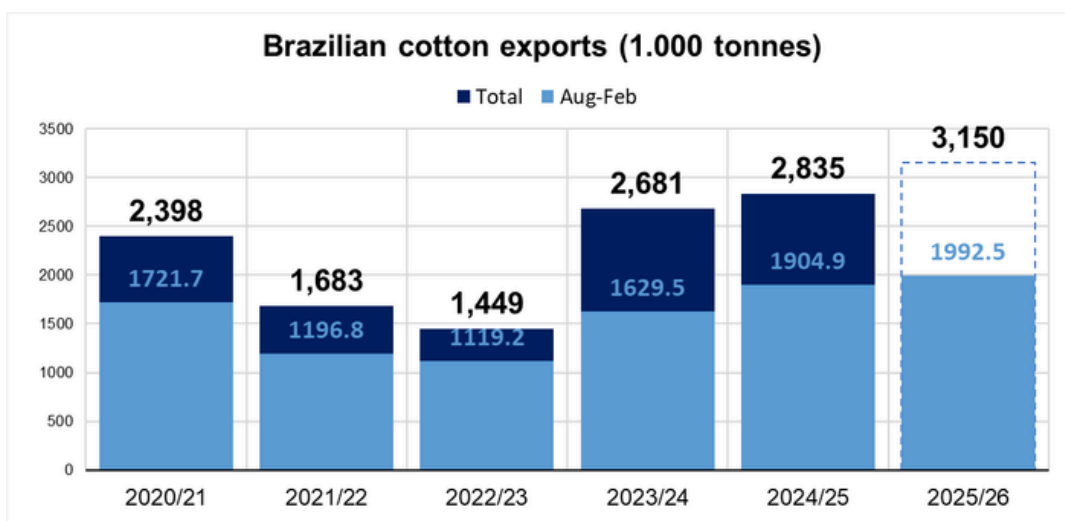
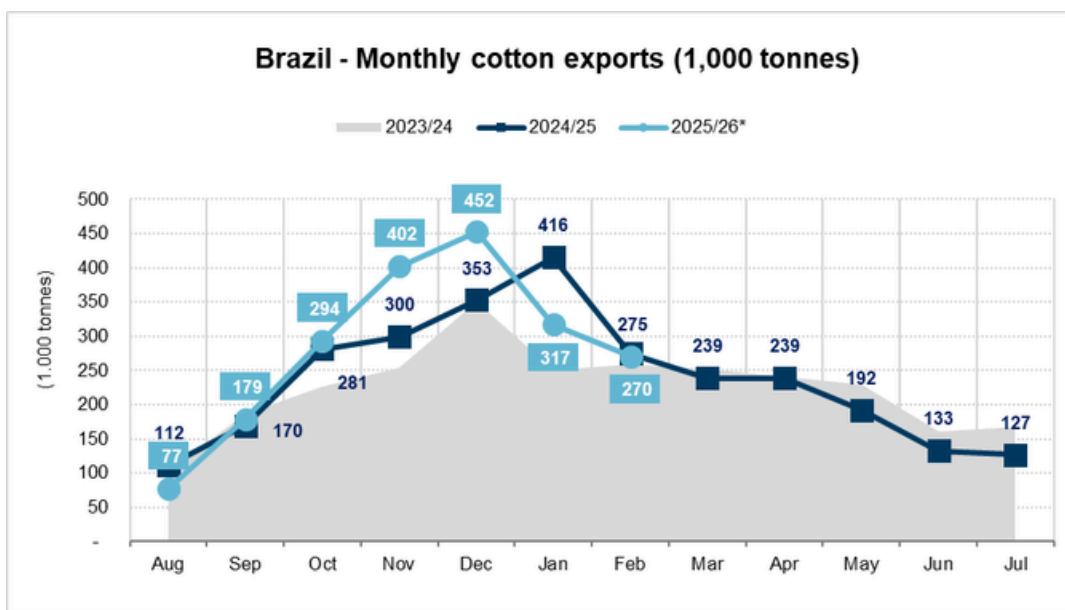


# Cotton Brazil market report

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

Ed. 59  
March 20<sup>th</sup> 2026

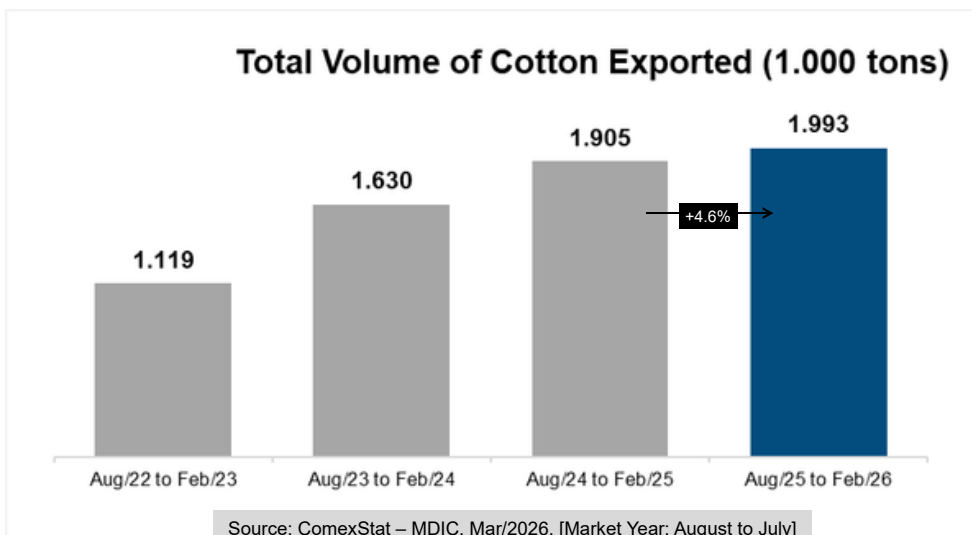
Following February's results, Brazil exported a total of 1.992 million tonnes of cotton in the first seven months of the 2025/26 marketing year (Aug/Feb).



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

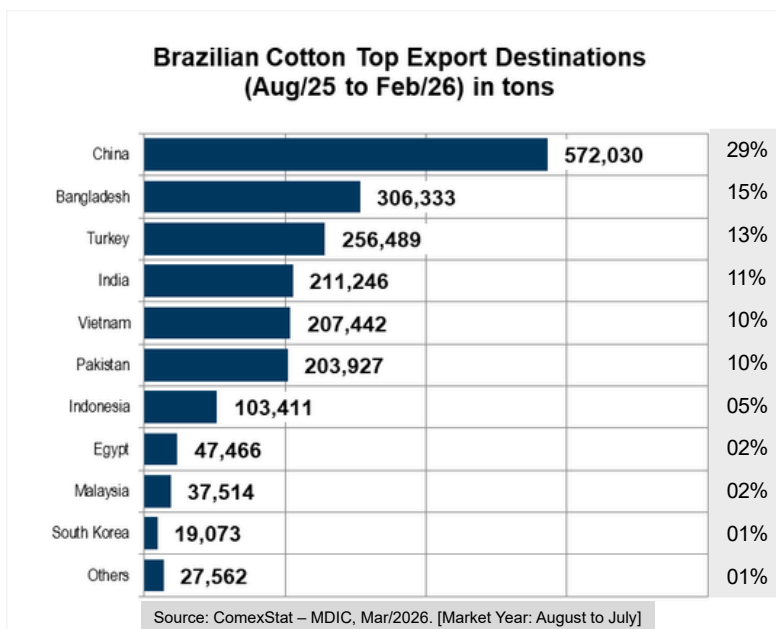


In the first seven months of the 2025/26 marketing year, Brazil exported **1.992,5 million tonnes** of cotton, **up 4.6%** compared to the same period of 2024/25.



From August to January 2026, China imported **572,030 tonnes** of Brazilian cotton (29% of the total). Bangladesh ranked second (**306,333 tonnes**; 15%), followed by Turkey (**256,489 tonnes**; 13%).

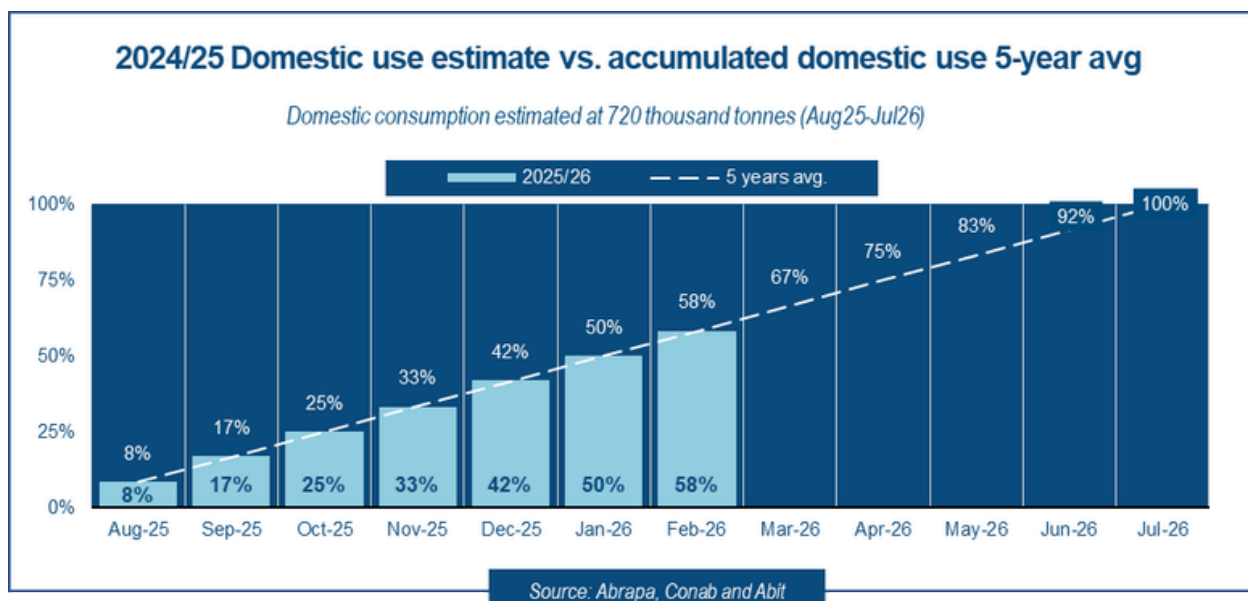
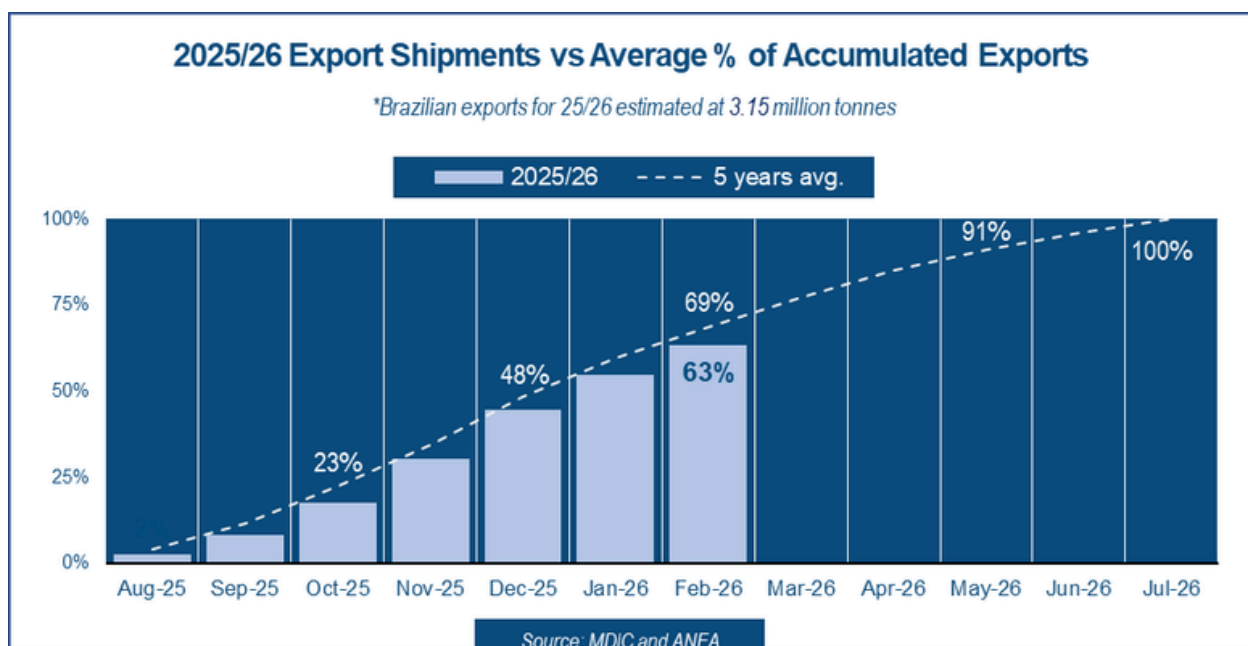
Combined, these three countries accounted for **1.134.852 tonnes**, representing **57% of total exports** in the 2025/26 marketing year.





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

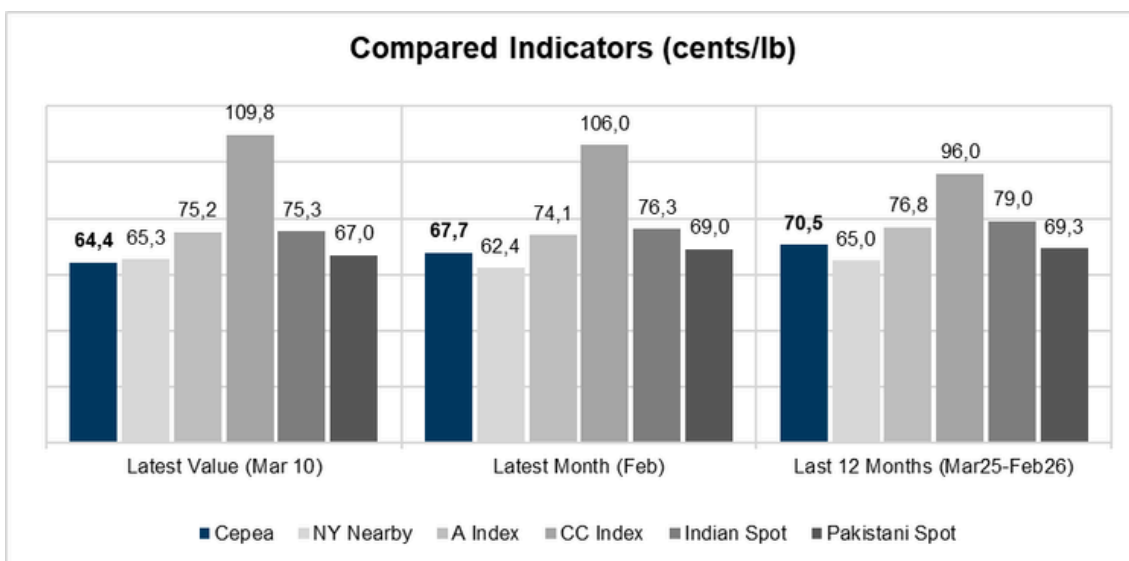
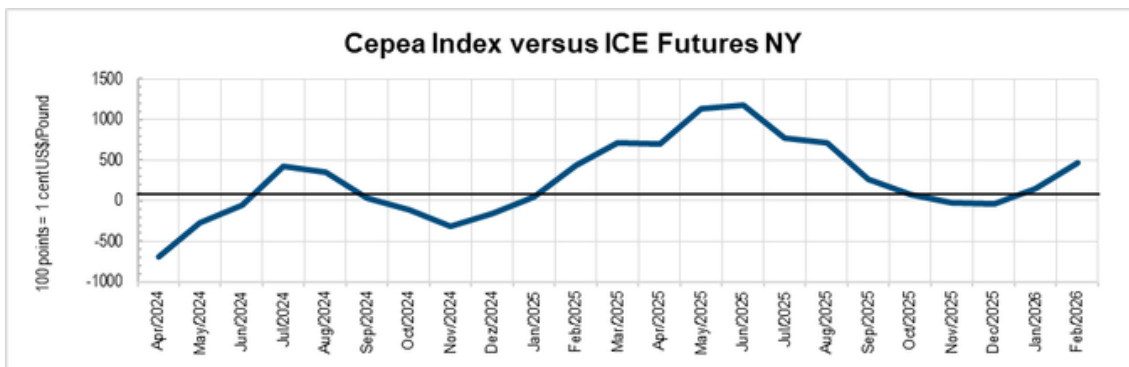
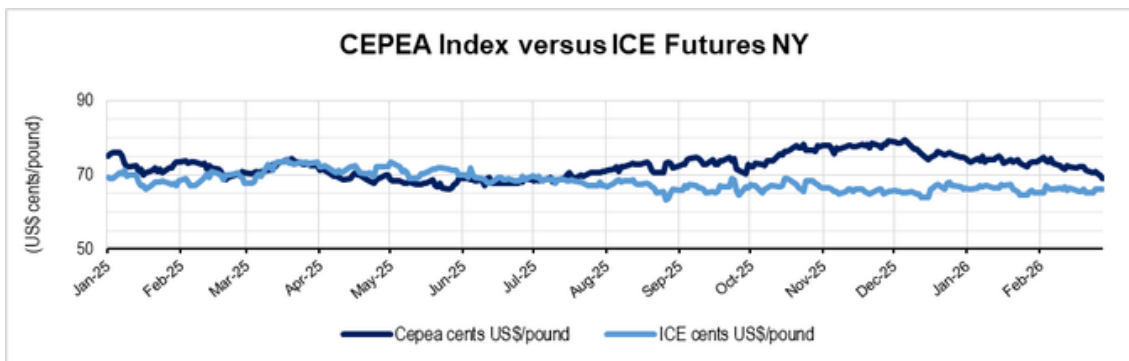
The charts below compare the performance of the current market year (2025/26) with the average Brazilian cotton exports over the last five years and the average volume for domestic use in Brazil also over the last five years.





## 6. PRICES

The Cepea/Esalq Indicator averaged 64.4 cents per pound in February, while ICE futures stood at 65.3 cents per pound. Compared to the 12-month average, both domestic and international prices remained at lower levels.



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

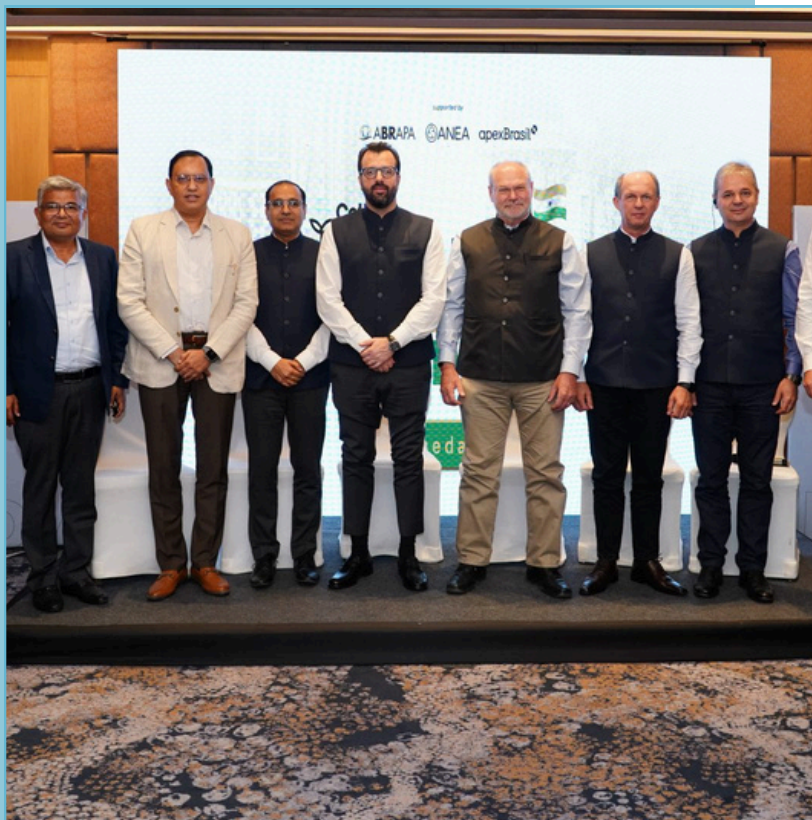
## Mission to India Strengthens Strategic Outlook for Brazilian Cotton

Cotton Brazil returns from its mission to India reaffirming Brazilian cotton as a competitive supplier in the global market, with real capacity for expansion. India aims to reach US\$ 100 billion in textile exports over the next five years, which is expected to significantly boost the country's demand for cotton.

The Asian country consumes around 5.5 million tons of fiber, but there is potential for this volume to reach 16.5 million tons within the same period.

India has one of the world's most important cotton industries and is recognized for its powerful textile sector. As a major producer of both cotton and textiles, it offers opportunities for Brazilian cotton to complement local production and supply the industry.

Amid discussions on expanding the trade agreement between Mercosur and India, Abrapa formally requested the inclusion of cotton in the list of products covered by the agreement, seeking to reduce the current import tariff applied to Brazilian cotton.



**Now available:  
February quality  
update**

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