

Strategic Analysis of the Brazilian Apparel Market

Trade Dynamics and Regulatory Outlook



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Introduction

Brazil continues to be a central pillar of emerging global markets, having demonstrated resilience through a period of post-pandemic recovery that saw its economy grow by approximately 3.4% in 2024. This recent momentum enabled Brazil to reclaim its position as the world’s 10th largest economy by nominal GDP in 2024.

While the size of the total economy has expanded, the average income per capita remains a point of contrast; as of 2023, it stands at approximately \$10,250 USD, reflecting a moderate increase from the pandemic lows but still significantly below the levels of developed nations and the \$14,000+ peaks previously seen.

The Italian Market

The Brazillian Market

An overview on the economy of Italy with a review of the most important geographical, economic, and demographic indicators.

Indicator	Value
Land Area	8,515,770 sq km
Location	Eastern South America, bordering the Atlantic Ocean
Economical Indicators	
Indicator	Value
GDP	\$ 4.165 Trillion (2024)
Annual growth of GDP (%)	3.4% (2024)
GDP by Sector (2017)	Agriculture 5.6%, Industry 21.3%, and Services 59.3% (2024)
Inflation rate	4.4% (2024)
Unemployment rate	6.8% (2024)
Total Exports	\$388.333 Billion (2024)
Main Exported Commodities	soybeans, crude petroleum, iron ore, raw sugar, corn (2023)
Exports - Partners	China 30%, USA 10%, Argentina 5%, Netherlands 3%, Chile 2% (2023)
Total Imports	\$377.05 billion (2024 est.)
Main Imported Commodities	refined petroleum, fertilizers, crude petroleum, vehicle parts/accessories, gas turbines (2023)

Imports - Partners	China 23%, USA 16%, Germany 5%, Argentina 5%, Russia 4% (2023)
Demographical Indicators	
Indicator	Value
Population	220,051,512 (2024) Female: 49.2% Male: 50.8%
Demographics	0-14 years: 19.6% 15-64 years: 69.5% Above 65 years: 10.9%
Population growth rate	0.58% (2025)
Average income per capita	\$10,310 (2024)
Source: The World FactBook https://www.cia.gov/the-world-factbook/countries/brazil/ Source: World Bank Group Open Data https://www.imf.org/external/datamapper/profile/BRA	

Production

The apparel and textile industry in Brazil remains a strategic powerhouse, serving as the second-largest employer in the country’s manufacturing sector. The total market value of the Brazilian textile and apparel chain is estimated to be approximately \$48.3 billion USD (roughly R\$ 260 billion) in 2024, contributing nearly 2% to the national GDP. The sector is characterized by a massive production network of over 25,200 companies, the vast majority of which are SMEs, supporting a workforce of approximately 1.5 million direct employees—a figure that rises significantly when indirect labor is included.

While Brazil benefits from being a global leader in cotton production, the industry faces structural hurdles such as high domestic operational costs (the "Brazil Cost") and aggressive competition from Asian imports. To counter these challenges, there is a notable shift toward nearshoring as Brazilian manufacturers leverage their proximity to major regional markets and focus on vertical integration to improve speed-to-market. Furthermore, corporate strategy is increasingly defined by digitalization through Industry 4.0 technologies and a rigorous commitment to the circular economy, with major players investing in waterless dyeing, recycled fibers, and supply chain traceability to align with global sustainability standards.

Trade Movement

Trade Movement in Brazil for Textile & Apparel with Countries All Over the World by Rank

Brazilian exports of apparel amounted to 206,952 million USD in 2025; a 11% increase compared to 186.437 million USD in 2024. Imports of apparel amounted to 2.354 billion USD during 2025, an increase of 11,09% compared to 2.119 billion USD in 2024. Its trade balance is estimated at around -2,147 billion USD in 2024. The following table shows the top ten destinations for the export and import for apparel to and from Brazil in 2025.

Brazilian Imports		Brazilian Exports	
Country	The value "One million" Dollar	Country	The value "One million" Dollar
Total Imports	2,354,120	Total Exports	206,952
China	1,211,686	Paraguay	59,286
Bangladesh	240,345	Uruguay	40,049
Viet Nam	117,250	Argentina	20,234
Paraguay	108,912	United States of America	19,400
Peru	90,718	Ecuador	9,207
India	81,219	Chile	8,066
Turkey	67,905	Portugal	4,625
Cambodia	55,655	Panama	4,269
Pakistan	53,064	United Arab Emirates	3,751
Morocco	47,357	Bolivia, Plurinational State of	3,346

Trade movement for knits between Brazil and other countries from all over the world in 2023-2025:

The following tables shows the most important imported/exported apparel (knitted) from/to Brazil. In 2025, Brazil's knitted apparel trade was led by two main categories: **T-shirts** accounted for the highest import volume at **\$225.18 million**, while **women's or girls' suits and jackets** represented the top export, totaling **\$30,200 million**. These items represent the most vital segments of the country's knitted clothing exchange.

Code	Product label (↔)	Imported value in 2023	Imported value in 2024	Imported value in 2025 ▼
6109	T-shirts, singlets and other vests, knitted or crocheted	136,350	159,969	225,183
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	95,723	127,407	160,137
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (excl. ...	136,626	138,151	136,925
6106	Women's or girls' blouses, shirts and shirt-blouses, knitted or crocheted (excl. T-shirts and ...	69,625	99,958	90,421
6115	Pantyhose, tights, stockings, socks and other hosiery, incl. graduated compression hosiery ...	92,506	93,279	89,501
6103	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	59,527	61,329	84,145
6116	Gloves, mittens and mitts, knitted or crocheted (excl. for babies)	72,105	76,940	78,562
6105	Men's or boys' shirts, knitted or crocheted (excl. nightshirts, T-shirts, singlets and other ...	54,034	56,787	73,816
6108	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, negligés, bathrobes, ...	38,920	48,173	57,483
6111	Babies' garments and clothing accessories, knitted or crocheted (excl. hats)	42,217	44,500	52,790
6101	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	49,905	42,597	47,009
6102	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	45,527	40,320	42,069
6107	Men's or boys' underpants, briefs, nightshirts, pyjamas, bathrobes, dressing gowns and similar ...	20,026	28,841	36,840
6114	Special garments for professional, sporting or other purposes, n.e.s., knitted or crocheted	24,481	22,827	26,722
6112	Track-suits, ski-suits and swimwear, knitted or crocheted	18,307	20,667	24,745
6117	Made-up clothing accessories, knitted or crocheted; knitted or crocheted parts of garments ...	5,169	5,897	4,833
6113	Garments, knitted or crocheted, rubberised or impregnated, coated or covered with plastics ...	2,291	2,806	2,930

Code	Product label (↔)	Exported value in 2023	Exported value in 2024	Exported value in 2025 ▼
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	32,868	27,326	30,200
6109	T-shirts, singlets and other vests, knitted or crocheted	18,517	20,409	22,789
6108	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, negligés, bathrobes, ...	9,754	11,411	12,456
6106	Women's or girls' blouses, shirts and shirt-blouses, knitted or crocheted (excl. T-shirts and ...	11,210	11,357	10,572
6112	Track-suits, ski-suits and swimwear, knitted or crocheted	10,260	8,712	8,932
6115	Pantyhose, tights, stockings, socks and other hosiery, incl. graduated compression hosiery ...	8,113	9,470	8,724
6103	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	8,012	6,750	8,480
6107	Men's or boys' underpants, briefs, nightshirts, pyjamas, bathrobes, dressing gowns and similar ...	4,348	4,180	6,141
6105	Men's or boys' shirts, knitted or crocheted (excl. nightshirts, T-shirts, singlets and other ...	3,660	5,614	5,812
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (excl. ...	4,159	3,697	5,165
6111	Babies' garments and clothing accessories, knitted or crocheted (excl. hats)	4,628	3,738	3,809
6102	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	2,422	2,225	2,427
6114	Special garments for professional, sporting or other purposes, n.e.s., knitted or crocheted	2,187	1,714	2,114
6101	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	2,386	2,228	1,951
6117	Made-up clothing accessories, knitted or crocheted; knitted or crocheted parts of garments ...	713	1,150	1,125
6113	Garments, knitted or crocheted, rubberised or impregnated, coated or covered with plastics ...	595	646	1,101
6116	Gloves, mittens and mitts, knitted or crocheted (excl. for babies)	1,436	741	798

Trade movement for woven between Brazil and other countries from all over the world in 2023-2025:

The following tables shows the most important imported/exported apparel (woven) from/to Brazil.

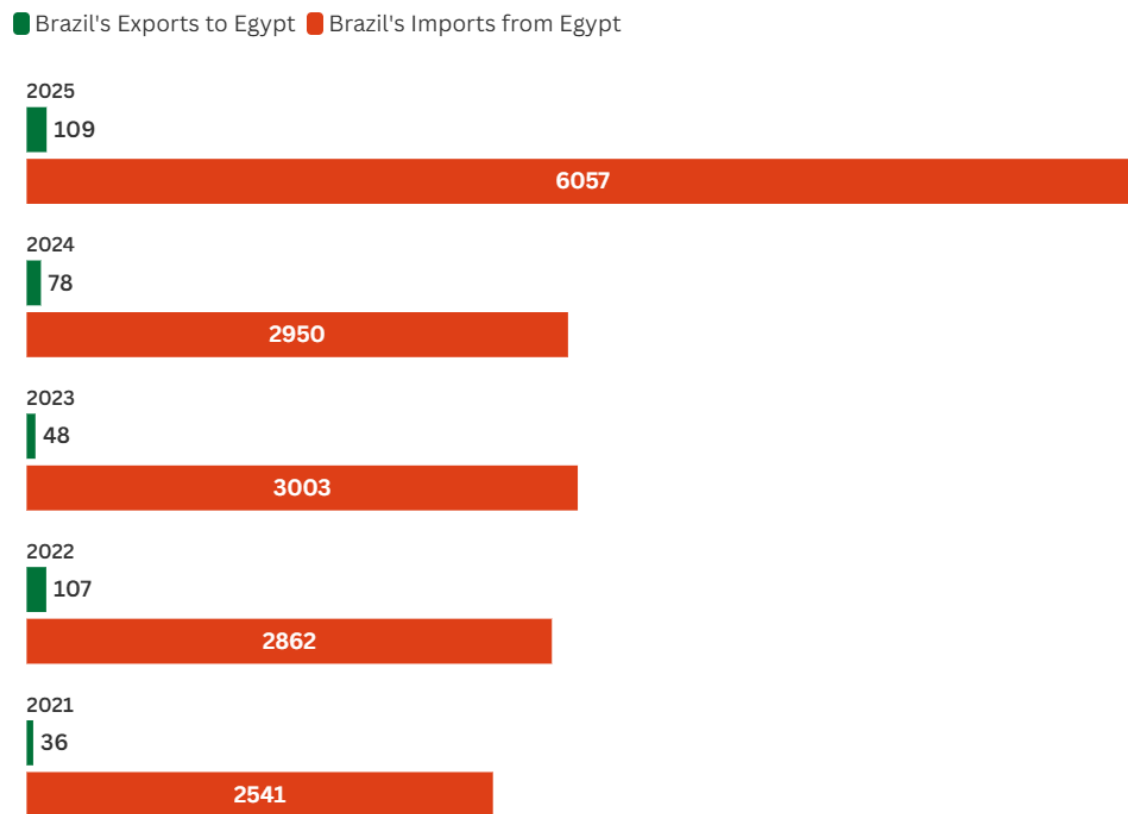
These tables show that the most important Brazilian imports of this 2025 were women’s or girls’ suits and jackets, which the imports of amounted to 359,97 million USD. The most important Brazilian exports were also women’s or girls’ suits and jackets, which the exports of amounted to 23,70 million USD.

Code	Product label (↔)	Imported value in 2023	Imported value in 2024	Imported value in 2025 ▼
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	251,309	321,303	359,795
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	141,697	181,124	209,307
6206	Women's or girls' blouses, shirts and shirt-blouses (excl. knitted or crocheted and vests)	82,971	105,534	107,623
6205	Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)	73,639	88,262	91,476
6201	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	111,776	99,330	89,425
6202	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	107,073	91,506	82,577
6210	Garments made up of felt or nonwovens, whether or not impregnated, coated, covered or laminated; ...	45,328	52,498	51,931
6211	Tracksuits, ski suits, swimwear and other garments, n.e.s. (excl. knitted or crocheted)	27,101	37,740	47,200
6212	Brassieres, girdles, corsets, braces, suspenders, garters and similar articles and parts thereof, ...	24,357	36,734	42,256
6209	Babies' garments and clothing accessories of textile materials (excl. knitted or crocheted ...	7,286	9,788	10,297
6214	Shawls, scarves, mufflers, mantillas, veils and similar articles (excl. knitted or crocheted)	8,628	7,478	8,746
6208	Women's or girls' singlets and other vests, slips, petticoats, briefs, panties, nightdresses, ...	5,137	5,808	7,457
6217	Made-up clothing accessories and parts of garments or clothing accessories, of all types of ...	3,165	3,654	4,089
6216	Gloves, mittens and mitts, of all types of textile materials (excluding knitted or crocheted ...	5,024	3,875	3,524
6215	Ties, bow ties and cravats of textile materials (excl. knitted or crocheted)	3,784	3,202	2,888
6207	Men's or boys' singlets and other vests, underpants, briefs, nightshirts, pyjamas, bathrobes, ...	817	981	1,164
6213	Handkerchiefs, of which no side exceeds 60 cm (excl. knitted or crocheted)	470	449	254

Code	Product label (↔)	Exported value in 2023	Exported value in 2024	Exported value in 2025 ▼
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	21,755	20,895	23,700
6212	Brassieres, girdles, corsets, braces, suspenders, garters and similar articles and parts thereof, ...	12,385	15,042	19,494
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	7,854	8,207	9,165
6206	Women's or girls' blouses, shirts and shirt-blouses (excl. knitted or crocheted and vests)	6,514	6,918	8,106
6205	Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)	2,610	2,485	2,568
6211	Tracksuits, ski suits, swimwear and other garments, n.e.s. (excl. knitted or crocheted)	3,584	2,614	2,384
6202	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	2,212	2,071	1,951
6201	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, ...	1,449	1,795	1,845
6210	Garments made up of felt or nonwovens, whether or not impregnated, coated, covered or laminated; ...	1,476	1,877	1,761
6208	Women's or girls' singlets and other vests, slips, petticoats, briefs, panties, nightdresses, ...	1,486	1,240	1,600
6217	Made-up clothing accessories and parts of garments or clothing accessories, of all types of ...	628	645	590
6209	Babies' garments and clothing accessories of textile materials (excl. knitted or crocheted ...	539	645	541
6214	Shawls, scarves, mufflers, mantillas, veils and similar articles (excl. knitted or crocheted)	410	395	391
6207	Men's or boys' singlets and other vests, underpants, briefs, nightshirts, pyjamas, bathrobes, ...	214	97	115
6216	Gloves, mittens and mitts, of all types of textile materials (excluding knitted or crocheted ...	172	129	113
6215	Ties, bow ties and cravats of textile materials (excl. knitted or crocheted)	26	12	30
6213	Handkerchiefs, of which no side exceeds 60 cm (excl. knitted or crocheted)	7	2	4


Trade Movement for Apparel between Brazil and Egypt 2023-2025:


Egyptian exports of apparel to Brazil in **2025** amounted to **6,057 million USD**, showing a significant increase of **105.32%** as compared to **2,950 million USD** in **2024**. Egyptian imports of apparel from Brazil in **2025** amounted to **109 thousand USD**, showing an increase of **39.74%** as compared to **78 thousand USD** in **2024**. The following figure shows the evolution of trade between Egypt and Brazil for apparel during the last five years:



Trade Movement for Knitted Apparel between Brazil and Egypt in 2023-2025:


The following tables shows the most important imported/exported knitted apparel from/to Brazil. The highest quantity of Brazilian imports from Egypt for 2025 were T-shirts, which the imports of amounted to 1,59 million USD. The highest exported Brazilian items to Egypt were women's or girls' suits and jackets, which the exports of amounted to 36 thousand USD. Overall, Egyptian exports to Brazil were higher than imports from Brazil.


Product code	Product label 	Brazil's imports from Egypt		
		Value in 2023	Value in 2024	Value in 2025 ▼
6109	T-shirts, singlets and other vests, knitted or crocheted	652	601	1,597
6103	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches . . .	42	6	436
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (excl. . . .	95	141	271
6105	Men's or boys' shirts, knitted or crocheted (excl. nightshirts, T-shirts, singlets and other . . .	56	27	206
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, . . .	25	5	144
6101	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	115	19	51
6102	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	82	3	31
6106	Women's or girls' blouses, shirts and shirt-blouses, knitted or crocheted (excl. T-shirts and . . .	10	0	4
6107	Men's or boys' underpants, briefs, nightshirts, pyjamas, bathrobes, dressing gowns and similar . . .	0	0	1
6111	Babies' garments and clothing accessories, knitted or crocheted (excl. hats)	18	0	1
6117	Made-up clothing accessories, knitted or crocheted; knitted or crocheted parts of garments . . .	0	0	0
6113	Garments, knitted or crocheted, rubberised or impregnated, coated or covered with plastics . . .	0	0	0
6116	Gloves, mittens and mitts, knitted or crocheted (excl. for babies)	0	0	0
6115	Pantyhose, tights, stockings, socks and other hosiery, incl. graduated compression hosiery . . .	0	1	0
6108	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, négligés, bathrobes, . . .	0	0	0
6112	Track-suits, ski-suits and swimwear, knitted or crocheted	0	0	0
6114	Special garments for professional, sporting or other purposes, n.e.s., knitted or crocheted	25	0	0

Product code	Product label 	Brazil's exports to Egypt		
		Value in 2023	Value in 2024	Value in 2025 ▼
6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, . . .	23	14	36
6112	Track-suits, ski-suits and swimwear, knitted or crocheted	5	9	14
6106	Women's or girls' blouses, shirts and shirt-blouses, knitted or crocheted (excl. T-shirts and . . .	7	0	6
6102	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	1	0	2
6107	Men's or boys' underpants, briefs, nightshirts, pyjamas, bathrobes, dressing gowns and similar . . .	0	0	0
6117	Made-up clothing accessories, knitted or crocheted; knitted or crocheted parts of garments . . .	0	0	0
6115	Pantyhose, tights, stockings, socks and other hosiery, incl. graduated compression hosiery . . .	0	0	0
6101	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	0	0	0
6114	Special garments for professional, sporting or other purposes, n.e.s., knitted or crocheted	0	0	0
6103	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches . . .	0	0	0
6109	T-shirts, singlets and other vests, knitted or crocheted	1	1	0
6111	Babies' garments and clothing accessories, knitted or crocheted (excl. hats)	0	0	0
6105	Men's or boys' shirts, knitted or crocheted (excl. nightshirts, T-shirts, singlets and other . . .	0	0	0
6113	Garments, knitted or crocheted, rubberised or impregnated, coated or covered with plastics . . .	0	0	0
6116	Gloves, mittens and mitts, knitted or crocheted (excl. for babies)	0	0	0
6108	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, négligés, bathrobes, . . .	0	0	0
6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (excl. . . .	0	0	0

Trade Movement for Woven Apparel between Brazil and Egypt in 2023-2025:

The trade data for woven apparel highlights a significant imbalance between Brazil and Egypt. In 2025, Egypt's primary export to Brazil was **women's or girls' suits and jackets**, totaling an impressive **\$1,778 million**. Conversely, while the same category led Brazilian exports to Egypt, the value was considerably lower at just **\$32 thousand**. Overall, the value of Egyptian exports to the Brazilian market remains substantially higher than the reciprocal imports.

Product code	Product label 	Brazil's imports from Egypt		
		Value in 2023	Value in 2024	Value in 2025 ▼
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, . . .	626	976	1,778
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches . . .	1,157	1,041	1,240
6210	Garments made up of felt or nonwovens, whether or not impregnated, coated, covered or laminated; . . .	0	73	117
6205	Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)	96	35	103
6202	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	2	9	42
6206	Women's or girls' blouses, shirts and shirt-blouses (excl. knitted or crocheted and vests)	0	8	30
6201	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	1	5	4
6209	Babies' garments and clothing accessories of textile materials (excl. knitted or crocheted . . .	0	0	3
6207	Men's or boys' singlets and other vests, underpants, briefs, nightshirts, pyjamas, bathrobes, . . .	0	0	1
6208	Women's or girls' singlets and other vests, slips, petticoats, briefs, panties, nightdresses, . . .	0	0	0
6216	Gloves, mittens and mitts, of all types of textile materials (excluding knitted or crocheted . . .	0	0	0
6211	Tracksuits, ski suits, swimwear and other garments, n.e.s. (excl. knitted or crocheted)	0	0	0
6213	Handkerchiefs, of which no side exceeds 60 cm (excl. knitted or crocheted)	0	0	0
6215	Ties, bow ties and cravats of textile materials (excl. knitted or crocheted)	0	0	0
6217	Made-up clothing accessories and parts of garments or clothing accessories, of all types of . . .	0	0	0
6212	Brassieres, girdles, corsets, braces, suspenders, garters and similar articles and parts thereof, . . .	0	0	0
6214	Shawls, scarves, mufflers, mantillas, veils and similar articles (excl. knitted or crocheted)	1	0	0

Product code	Product label 	Brazil's exports to Egypt		
		Value in 2023	Value in 2024	Value in 2025 ▼
6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, . . .	8	45	32
6206	Women's or girls' blouses, shirts and shirt-blouses (excl. knitted or crocheted and vests)	2	7	16
6202	Women's or girls' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	0	3	2
6207	Men's or boys' singlets and other vests, underpants, briefs, nightshirts, pyjamas, bathrobes, . . .	0	0	0
6209	Babies' garments and clothing accessories of textile materials (excl. knitted or crocheted . . .	0	0	0
6215	Ties, bow ties and cravats of textile materials (excl. knitted or crocheted)	0	0	0
6217	Made-up clothing accessories and parts of garments or clothing accessories, of all types of . . .	0	0	0
6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches . . .	0	0	0
6205	Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)	0	0	0
6210	Garments made up of felt or nonwovens, whether or not impregnated, coated, covered or laminated; . . .	0	0	0
6216	Gloves, mittens and mitts, of all types of textile materials (excluding knitted or crocheted . . .	0	0	0
6211	Tracksuits, ski suits, swimwear and other garments, n.e.s. (excl. knitted or crocheted)	0	0	0
6213	Handkerchiefs, of which no side exceeds 60 cm (excl. knitted or crocheted)	0	0	0
6212	Brassieres, girdles, corsets, braces, suspenders, garters and similar articles and parts thereof, . . .	0	0	0
6214	Shawls, scarves, mufflers, mantillas, veils and similar articles (excl. knitted or crocheted)	0	0	0
6201	Men's or boys' overcoats, car coats, capes, cloaks, anoraks, incl. ski jackets, windcheaters, . . .	0	0	0
6208	Women's or girls' singlets and other vests, slips, petticoats, briefs, panties, nightdresses, . . .	0	0	0

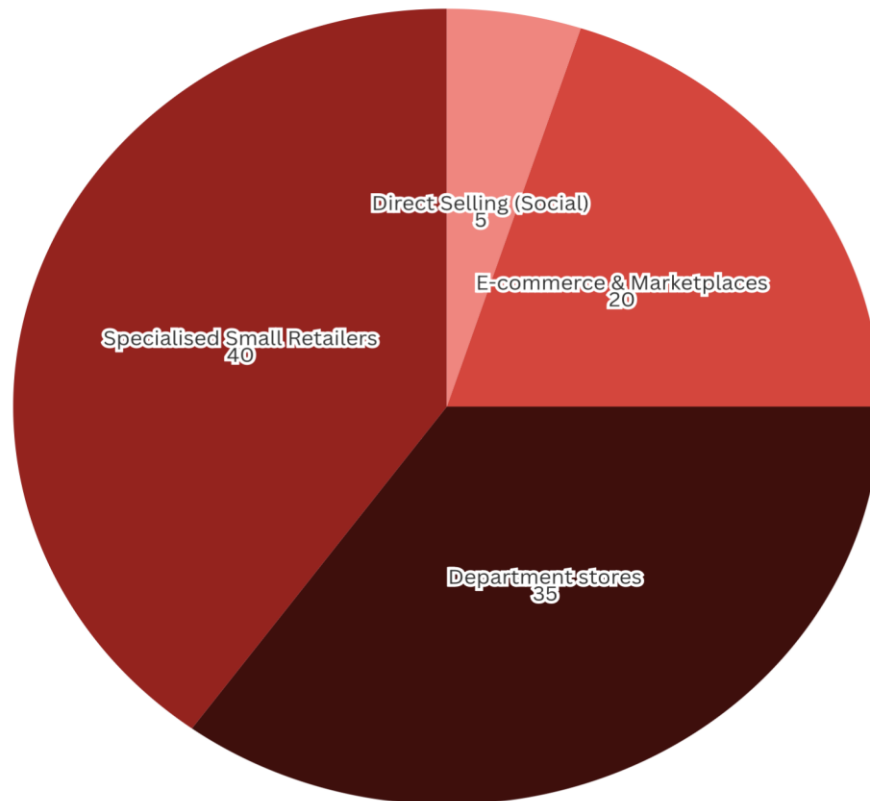
Distribution Channels

The Brazilian apparel market is defined by a dominant offline presence (80–85% of sales) that is increasingly integrated with a sophisticated digital ecosystem. While **78% of consumers** still prefer in-store purchases to "touch and feel" clothing, a "Click-and-Mortar" transformation is underway: **46–50% of shoppers** now use digital tools inside physical stores to compare prices or check availability.

- **Specialised Small Retailers (~40% share):** This fragmented landscape consists of over 25,000 independent boutiques. Accessible via regional distributors, these shops are essential entry points for premium or niche brands.
- **Department Stores (~35% share):** Dominant players like Lojas Renner, Riachuelo, and C&A serve as high-volume hubs. Success in this channel requires large-scale production capacity and strict compliance with "Brazil Cost" logistics.

- **E-commerce & Marketplaces (~15–20% share):** Generating **\$17.9 billion USD** in revenue, this segment is led by Shopee (\$5.9 billion fashion share), SHEIN, and Mercado Libre. While it is a key growth engine for Direct-to-Consumer (D2C) strategies, exporters must manage a 60% duty plus ICMS on cross-border transactions.
- **Direct Selling (~3–5% share):** Utilizes relationship-based sales through WhatsApp and Instagram. This channel is particularly vital for reaching consumers in rural areas where shopping malls are scarce.

■ Department stores ■ Specialised Small Retailers ■ E-commerce & Marketplaces ■ Direct Selling (Social)



Brazil Textile & Apparel Machinery: 2024 Market Profile

Brazil is a net importer of textile machinery, as its domestic machinery industry primarily focuses on parts and low-complexity equipment rather than high-speed automated systems.

1. Trade Balance: Heavy Reliance on Imports
 - **Import Dominance-** in 2024, Brazil’s imports of textile and apparel machinery remained high as 42% of domestic textile companies planned moderate to heavy investments in new technology to combat Asian competition.
 - **Export Profile-** Brazil’s exports in this category are minimal, totaling only \$7.16 million for auxiliary textile machinery (HS 8448) in the 2024 period. Interestingly, its top

export destination for specialized components is Germany (\$3.74M), followed by regional partners like Paraguay and Argentina

- **Negative Trade Balance:** Using "Knitting Machine Accessories" (HS 8448.5) as a benchmark, Brazil exported \$15.2M but imported \$69.8M, resulting in a specific trade deficit of \$54.6M in this niche alone

2. Key Machinery Categories & Top Origins (2024 Data)

Machine Category (HS Code)	2024 Market Trends	Top Importing Origins (Ranked)
Knitting & Accessories (8447)	High demand for 3D knitting and activewear tech. Imports reached \$69.8M.	1. Germany 2. Japan 3. China Access Here.
Spinning & Preparation (8445)	Largest segment by value; critical for Brazil's cotton industry.	1. Germany 2. India 3. Japan Access Here.
Weaving / Looms (8446)	Rapid replacement of old looms with air-jet and rapier technology.	1. India 2. Germany india germ chin 3. China Access Here.
Sewing & Apparel (8452)	Largest volume category by unit; heavily dominated by Chinese manufacturers. Shift toward robotic assembly and AI-driven quality control.	1. China 2. Canada 3. Germany Access Here.

3. Modernization Indicators

- **AI Integration:** Major players like Cedro Textil completed \$50 million upgrades in late 2024, focusing on AI-driven quality control in weaving to reduce defects by 25%.
- **Nearshoring Pressure:** Brazilian manufacturers are investing in faster machinery to support a "nearshoring" trend that has already reduced lead times by 40% for some denim suppliers.

Laws and Regulations

1. Mandatory Labeling (INMETRO & CONMETRO)

All apparel must feature a permanent label in Portuguese. Failure to comply results in immediate customs seizure or heavy fines (up to R\$ 1.5 million).

- **Law:** [Portaria INMETRO No. 118/2021](#)
- **Requirements:**
 - **Brand/Tax ID:** Must include the name or brand of the manufacturer/importer and their tax ID (CNPJ for Brazilian importers).
 - **Country of Origin:** Must state "Made in [Country]" (e.g., Feito no Egito). Flags or trade bloc names are not permitted.
 - **Fiber Composition:** Must list the generic name of fibers (e.g., Algodão for Cotton) in descending order of percentage.
 - **Care Instructions:** Must use the five international symbols (Ginetex/ISO 3758) in a specific sequence: Washing, Bleaching, Drying, Ironing, and Professional Care.
 - **Size:** Must follow the Brazilian sizing standards (ABNT NBR 13377), which differ from US/EU measurements.

2. Product Certification and INMETRO Standards

While not all clothing requires a “stamp of quality” (such as toys and medical devices), the production process must align with Brazilian Technical Standards (ABNT).

- **Law:** [Ordinance No. 115/2022](#)
- **Explanation:**
 - INMETRO (National Institute of Metrology, Quality and Technology) oversees these standards. For apparel, certification is generally based on a Declaration of Conformity by the supplier. However, the 2025 regulatory model places higher responsibility on the supplier for compliance; random market audits are frequent, and non-compliant goods are seized at the border.

3. Traceability & Unique Identifiers (GTIN)

Starting in 2026, a new mandatory identification system is being enforced to combat illegal trade and piracy in the fashion sector.

- **Law:** [INMETRO Ordinance No. 459/2025 \(Traceability Standards\)](#)
- **Requirement:**
 - All apparel and footwear must have an internationally accepted unique identifier, specifically the Global Trade Item Number (GTIN).
- **Application:**

- The code must be present on the product packaging or the item itself. Domestic retailers have until December 2027 to clear old stock, but all new imports arriving in 2026 must be compliant by July 31st.

4. Chemical Safety: “Brazilian REACH”

Brazil has enacted its own chemical substance control framework to align with global environmental standards.

- **Law:** [Federal Law No. 15.022/2024 \(National Inventory of Chemical Substances\)](#)
- **Requirement:**
 - Manufacturers or importers of chemical substances (including those used in dyes, coatings, or waterproofing for apparel) exceeding 1 ton per year must register in a national inventory.

5. Customs & The 2026 Tax Transition

Brazil is currently in the "test phase" of a massive overhaul of its tax and customs systems.

- **Customs Reform (DUIMP):**
 - As of **January 2026**, the old Siscomex system is being fully replaced by the [Single Import Declaration \(DUIMP\)](#) on the PUCOMEX portal. This 100% digital system integrates licenses (LPCO), customs, and tax procedures into one window.
- **Dual VAT (CBS/IBS):** Under [Complementary Law No. 214/2025](#), 2026 marks the first year of the transition to a new tax system.
 - **2026 Test Rates:** Importers will see a 0.9% CBS (Federal) and 0.1% IBS (State) rate applied during this testing period alongside existing taxes (IPI, PIS/COFINS).
 - **Goal:** This period is designed for data collection before the full discontinuation of old taxes in 2027.

Tariffs on Egyptian Exports:

Product Category	Example Items	Standard Brazil Tariff (MFN)	Egyptian Preferential Tariff (2025)	Status for 2026
Category A & B	Raw cotton, basic fibers, certain yarns	8-14%	0%	0%
Category C	Knitted fabrics, woven fabrics, some home textiles	16-26%	0%	0%

Category D	Ready-made garments (Shirts, Suits, T-shirts)	35%	3.5%	0%
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Tax Imposed by Brazil

Consumer Tax on Apparel in Brazil (2025)

As of 2025, Brazil's tax system for apparel remains primarily based on the legacy "cascading" model. While a major tax reform was sanctioned in January 2025 (Law 214/2025), the new VAT rates (CBS/IBS) will only begin their transition phase in 2026. For the duration of 2025, consumers continue to pay taxes that are "embedded" in the final price.

Domestic Retail Purchases

For apparel bought at local stores, the total tax burden remains high due to the coexistence of legacy taxes and new reform pilot rates.

- **Total Effective Tax: 35% – 40%** of the final retail price.
- **Breakdown:**
 - **ICMS (State VAT):** The primary tax, ranging from 17% to 19% (e.g., 18% in São Paulo).
 - **Federal Taxes (PIS/COFINS):** Combined rate of 9.25%.
 - **New Dual VAT (2026 Pilot):** A symbolic 1% "test rate" (0.9% Federal CBS + 0.1% State IBS) now appears on receipts but does not yet replace the legacy rates.

International Online Purchases (Cross-Border)

Taxes on individual imports (B2C) are significantly higher to protect local industry.

- **Purchases < \$50:** ~44.5% total (20% Federal Import Tax + 17% ICMS).
- **Purchases > \$50:** ~75% to 92% total (60% Federal Import Tax + 17% ICMS).

Prominent Brazillian Ports

- Belem Port.
- DTSE/Gegua Oil Terminal.
- Itajai.
- Port de Salvador.
- Porto Alegre.

Prominent Brazillian Newspaper

- Folha de S.Paulo folha.uol.com.br
- O Globo oglobo.globo.com
- O Estado de S. Paulo estadao.com.br
- Valor Economico valor.globo.com

Specialised Exhibitions

- FEBRATEX febratex.com.br
- FENIN Fashion fenin.com.br
- GOTEX Show gotexshow.com.br
- Inspiramais inspiramais.com.br

Comments

The following observations summarize the current state of the Brazilian market and its relationship with Egyptian apparel exports:

• **Substantial Positive Trade Balance:**

- Egyptian apparel exports to Brazil continue to dominate the relationship, reaching **\$6,057 million USD** in 2025.
- This vastly outweighs imports from Brazil, which stood at only **\$109 thousand USD** for the same period.

• **Unprecedented Export Growth:**

- Egypt's apparel exports witnessed a massive surge of **105.32%** year-on-year, jumping from \$2,950 million USD in 2024 to **\$6,057 million USD** in 2025.

• **Steady Increase in Brazilian Imports:**

- Although the values remain small, Brazilian apparel imports into Egypt grew by **39.74%**, rising from \$78 thousand USD in 2024 to **\$109 thousand USD** in 2025.

• **Competitive Landscape:**

- The doubling of Egyptian export values suggests that Egyptian manufacturers are successfully leveraging the **90% tariff discount** provided under the Mercosur-Egypt Free Trade Agreement.
- With Egyptian goods facing only a **3.5% duty** compared to the standard 35%, the 2025 figures indicate a major breakthrough in overcoming the high consumer entry barriers in the Brazilian retail market.

Recommendations

To increase the volume and value of Egyptian apparel exports to Brazil, the following strategic actions are recommended:

- **Leverage the 2025/2026 Tariff Cliff:**
 - Take immediate advantage of the 3.5% preferential tariff for Category D items in 2025, noting that this rate is scheduled to drop to 0% in September 2026 under the Mercosur-Egypt FTA.
- **Focus on Department Store Partnerships:**
 - Target major "volume players" such as Lojas Renner, Riachuelo, and C&A, which hold a ~35% market share and are ideal for large-scale Egyptian production capacities.
- **Ensure Strict Labeling Compliance:**
 - Invest in dedicated Portuguese labeling lines to meet INMETRO No. 118/2021 requirements, specifically ensuring generic fiber names and five international care symbols are used to avoid customs seizures.
- **Utilize Strategic Sourcing Exhibitions:**
 - Actively exhibit at the GOTEX Show in São Paulo, which is specifically designed to connect international exporters with Brazilian importers and distributors
- **Prioritize Southern Port Logistics:**
 - For apparel intended for the southern textile cluster, utilize the Port of Itajaí, while using the Port of Santos for direct access to the massive São Paulo retail market.