



# BRAZILIAN EXPORTS OF HIDES AND SKINS

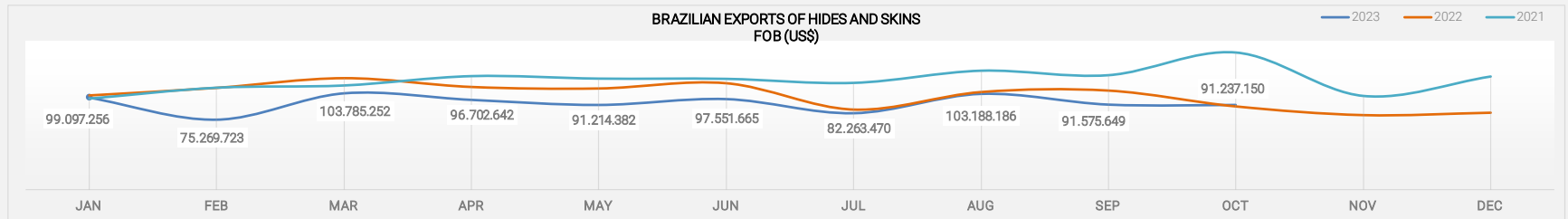
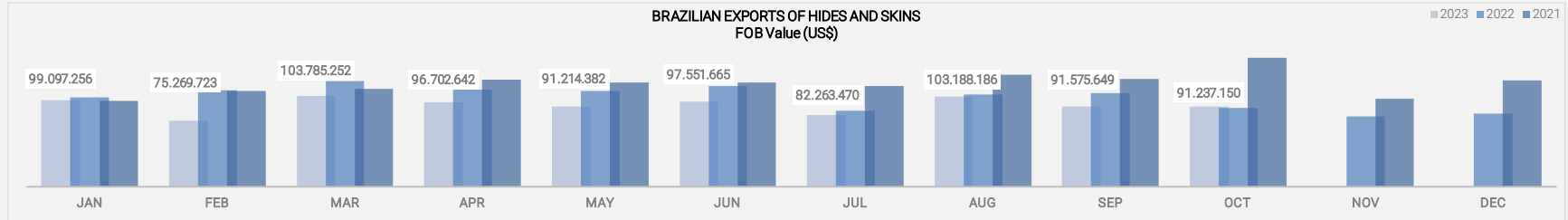
## October 2023

1	BRAZILIAN EXPORTS OF HIDES AND SKINS - CHAPTER CODE 41 .....	3
	ANALYSIS OF TOTAL EXPORTS.....	4
2	BRAZILIAN EXPORTS OF HIDES AND SKINS BY DESTINATION.....	5
	ANALYSIS OF MAIN DESTINATIONS.....	6
3	BRAZILIAN EXPORTS OF BOVINE LEATHER BY TYPE.....	7
	ANALYSIS OF TYPES OF LEATHER.....	8
4	BRAZILIAN EXPORTS OF HIDES AND SKINS BY STATE.....	9
	ANALYSIS OF STATES.....	10
	CLOSING REMARKS	11

# BRAZILIAN EXPORTS OF HIDES AND SKINS

MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2023	2022	2021	MONTH 2023	2023/2022	2023/2021	2023	2022	2021	MONTH 2023	2023/2022	2023/2021	2023	2022	2021	MONTH 2023	2023/2022	2023/2021
JAN	99.097.256	101.697.054	97.842.657	19,1%	-2,6%	1,3%	14.458.015	12.063.997	14.794.446	32,6%	19,8%	-2,3%	40.842.514	30.527.897	38.010.157	33,9%	33,8%	7,5%
FEB	75.269.723	109.794.363	109.528.720	-24,0%	-31,4%	-31,3%	10.666.731	11.518.363	15.698.373	-26,2%	-7,4%	-32,1%	29.776.931	25.501.700	38.218.258	-27,1%	16,8%	-22,1%
MAR	103.785.252	120.139.328	111.927.496	37,9%	-13,6%	-7,3%	14.083.877	13.625.210	15.133.632	32,0%	3,4%	-6,9%	36.974.204	31.859.528	34.265.446	24,2%	16,1%	7,9%
APR	96.702.642	110.738.209	121.951.096	-6,8%	-12,7%	-20,7%	13.711.003	11.773.200	16.318.524	-2,6%	16,5%	-16,0%	35.454.984	28.030.076	36.417.387	-4,1%	26,5%	-2,6%
MAY	91.214.382	109.124.938	119.279.811	-5,7%	-16,4%	-23,5%	12.063.660	11.199.958	15.163.923	-12,0%	7,7%	-20,4%	31.339.687	24.982.739	33.656.700	-11,6%	25,4%	-6,9%
JUN	97.551.665	114.733.220	119.014.618	6,9%	-15,0%	-18,0%	13.615.601	12.737.959	14.251.467	12,9%	6,9%	-4,5%	34.013.962	32.538.087	31.809.207	8,5%	4,5%	6,9%
JUL	82.263.470	86.582.958	114.704.199	-15,7%	-5,0%	-28,3%	11.111.985	9.168.223	12.987.305	-18,4%	21,2%	-14,4%	29.558.115	21.825.224	28.797.843	-13,1%	35,4%	2,6%
AUG	103.188.186	105.318.890	127.753.281	25,4%	-2,0%	-19,2%	14.636.232	12.398.155	15.456.776	31,7%	18,1%	-5,3%	40.918.684	32.250.962	31.412.555	38,4%	26,9%	30,3%
SEP	91.575.649	106.870.559	122.947.850	-11,3%	-14,3%	-25,5%	13.494.619	12.998.266	13.406.581	-7,8%	3,8%	0,7%	36.476.976	35.798.746	32.398.066	-10,9%	1,9%	12,6%
OCT	91.237.150	89.944.558	147.230.475	-0,4%	1,4%	-38,0%	13.310.650	11.595.103	15.861.118	-1,4%	14,8%	-16,1%	36.910.273	30.269.139	35.079.112	1,2%	21,9%	5,2%
NOV		80.665.640	100.737.179					10.767.130	10.511.289					30.454.895	25.844.344			
DEC		83.228.588	121.530.065					10.904.167	12.723.535					30.498.876	29.669.508			
<b>Total</b>	<b>931.885.375</b>	<b>1.218.838.305</b>	<b>1.414.447.447</b>		<b>-11,7%</b>	<b>-21,8%</b>	<b>131.152.373</b>	<b>140.749.731</b>	<b>172.306.969</b>		<b>10,1%</b>	<b>-12,0%</b>	<b>352.266.330</b>	<b>354.537.869</b>	<b>395.578.583</b>		<b>20,0%</b>	<b>3,6%</b>

Source: SECEX - Prepared by: CICB



## ■ ANALYSIS OF TOTAL EXPORTS

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Exports of hides and skins presented by SECEX (Foreign Trade Secretariat) of the Ministry of Development, Industry, Commerce and Services and analyzed by CICB, referring to the month of October 2023, registered a value of US\$ 91.2 million, representing a drop of 0.4% compared to the previous month, but an increase of 1.4% compared to the same month last year, when US\$ 89.9 million were exported.

Considering volume, 13.3 million square meters and 36.9 thousand tons were exported, which meant, respectively, increases of 14.8% and 21.9% over the same month in 2022. Regarding September, there was a decrease 1.4% in area and 1.2% increase in weight.

The accumulated amount from January to October totaled US\$ 931.9 million, 11.7% below the same range in 2022, but increases of 10.1% in traded area and 20.0% in weight.

## BRAZILIAN EXPORTS OF HIDES AND SKINS BY DESTINATION

COUNTRIES	FOB VALUE (US\$)			Share		AREA (sqm)			Share		WEIGHT (KG)			Share	
	Jan-Oct 2023	Jan-Oct 2022	Jan-Oct 2021	2023	2023/2022	Jan-Oct 2023	Jan-Oct 2022	Jan-Oct 2021	2023	2023/2022	Jan-Oct 2023	Jan-Oct 2022	Jan-Oct 2021	2023	2023/2022
1 China + Hong Kong	290.107.480	292.489.609	408.629.882	31,1%	-0,8%	55.775.343	43.258.812	59.755.197	42,5%	28,9%	169.427.678	121.984.647	158.195.060	48,1%	38,9%
China	259.645.560	238.541.337	355.229.041	27,9%	8,8%	50.110.493	36.369.442	53.610.592	38,2%	37,8%	154.582.659	104.210.658	142.157.190	43,9%	48,3%
2 United States	153.937.507	196.433.769	170.348.392	16,5%	-21,6%	11.618.652	12.959.834	13.316.513	8,9%	-10,3%	10.218.741	11.288.579	11.365.410	2,9%	-9,5%
3 Italy	116.565.985	179.010.628	169.545.681	12,5%	-34,9%	20.355.461	22.737.822	22.332.241	15,5%	-10,5%	65.275.388	76.840.217	67.192.442	18,5%	-15,1%
4 Vietnam	57.117.628	55.093.605	90.339.910	6,1%	3,7%	11.229.988	9.798.553	16.197.690	8,6%	14,6%	27.243.308	23.923.384	34.489.789	7,7%	13,9%
5 Mexico	43.148.888	22.342.333	37.295.784	4,6%	93,1%	4.077.538	2.182.019	3.325.819	3,1%	86,9%	4.951.740	4.471.687	4.730.448	1,4%	10,7%
6 South Korea	42.568.381	36.973.426	47.789.599	4,6%	15,1%	3.982.383	2.214.328	2.851.356	3,0%	79,8%	5.422.496	2.136.389	2.518.782	1,5%	153,8%
7 Thailand	34.508.189	40.203.779	35.790.262	3,7%	-14,2%	3.555.283	2.954.169	3.127.374	2,7%	20,3%	5.822.221	5.002.528	5.039.645	1,7%	16,4%
Hong Kong	30.461.920	53.948.272	53.400.841	3,3%	-43,5%	5.664.850	6.889.370	6.144.605	4,3%	-17,8%	14.845.019	17.773.989	16.037.870	4,2%	-16,5%
8 Germany	28.787.605	44.978.035	42.296.170	3,1%	-36,0%	2.242.465	3.059.306	3.547.303	1,7%	-26,7%	1.885.795	2.526.149	3.254.473	0,5%	-25,3%
9 Hungary	16.198.145	21.030.172	21.840.410	1,7%	-23,0%	1.327.579	1.411.945	1.694.721	1,0%	-6,0%	1.137.367	1.290.192	1.558.352	0,3%	-11,8%
10 Taiwan	12.274.933	15.462.442	20.784.900	1,3%	-20,6%	2.886.683	3.891.150	6.387.412	2,2%	-25,8%	8.297.130	9.811.872	16.473.901	2,4%	-15,4%
11 Uruguay	10.328.407	6.994.471	7.879.794	1,1%	47,7%	1.278.189	1.292.733	1.142.322	1,0%	-1,1%	3.966.029	3.645.064	3.827.518	1,1%	8,8%
12 Tunisia	10.229.790	7.651.665	8.313.585	1,1%	33,7%	644.440	479.916	543.045	0,5%	34,3%	996.427	758.045	852.264	0,3%	31,4%
13 Argentina	8.472.269	9.619.986	5.826.265	0,9%	-11,9%	601.333	759.465	589.966	0,5%	-20,8%	731.095	752.305	540.225	0,2%	-2,8%
14 Spain	7.922.968	4.289.438	5.711.619	0,9%	84,7%	1.958.789	1.410.058	2.510.118	1,5%	38,9%	5.488.902	4.024.242	6.970.525	1,6%	36,4%
15 Netherlands	7.760.994	9.486.154	11.165.694	0,8%	-18,2%	788.131	782.155	952.186	0,6%	0,8%	761.386	736.688	895.306	0,2%	3,4%
16 Norway	7.351.081	12.283.787	11.604.067	0,8%	-40,2%	510.302	707.563	724.246	0,4%	-27,9%	357.939	502.622	538.965	0,1%	-28,8%
17 Slovakia	6.877.685	2.832.544	338.283	0,7%	142,8%	436.759	140.913	27.448	0,3%	209,9%	425.536	180.180	20.592	0,1%	136,2%
18 India	6.386.131	11.302.221	9.415.993	0,7%	-43,5%	1.388.340	1.286.689	1.067.003	1,1%	7,9%	4.594.915	4.529.944	2.899.164	1,3%	1,4%
19 Switzerland	4.969.379	2.543.356	7.620.095	0,5%	95,4%	1.197.880	757.587	1.619.834	0,9%	58,1%	3.965.625	3.012.021	4.344.835	1,1%	31,7%
20 Turkey	4.899.391	900.999	155.833	0,5%	443,8%	96.112	30.029	10.048	0,1%	220,1%	10.487.113	1.341.610	90.263	3,0%	681,7%
21 Poland	4.379.621	7.516.515	6.172.809	0,5%	-41,7%	398.729	676.094	588.774	0,3%	-41,0%	331.724	560.164	468.518	0,1%	-40,8%
22 Portugal	4.047.213	3.644.317	5.208.819	0,4%	11,1%	366.527	315.920	518.469	0,3%	16,0%	823.468	694.839	911.960	0,2%	18,5%
23 Malaysia	3.997.312	7.269.642	5.364.235	0,4%	-45,0%	305.704	494.180	416.003	0,2%	-38,1%	244.968	400.394	328.888	0,1%	-38,8%
24 France	3.899.403	4.044.875	1.699.962	0,4%	-3,6%	166.443	158.675	75.765	0,1%	4,9%	250.261	254.115	120.206	0,1%	-1,5%
25 Canada	3.837.250	4.221.479	4.445.994	0,4%	-9,1%	237.681	250.454	289.521	0,2%	-5,1%	215.129	232.553	251.953	0,1%	-7,5%
26 Indonesia	3.050.639	16.878.688	15.023.951	0,3%	-81,9%	384.300	1.471.978	1.401.572	0,3%	-73,9%	290.508	1.150.962	1.248.634	0,1%	-74,8%
27 Japan	3.017.068	2.437.855	1.898.167	0,3%	23,8%	258.845	173.466	247.686	0,2%	49,2%	374.901	369.599	663.133	0,1%	1,4%
28 Chile	2.988.425	4.631.740	4.507.557	0,3%	-35,5%	368.500	517.707	533.649	0,3%	-28,8%	471.506	625.405	585.715	0,1%	-24,6%
29 South Africa	2.952.919	2.782.522	5.443.995	0,3%	6,1%	305.563	332.708	596.309	0,2%	-8,2%	467.303	401.945	984.911	0,1%	16,3%
30 Nigeria	2.811.495	1.486.846	414.954	0,3%	89,1%	0	7.699	0	0,0%	-100,0%	8.781.665	3.676.813	1.619.037	2,5%	138,8%
Others (2023: +49 countries)	26.491.194	28.107.179	29.307.542	2,8%	-5,7%	2.408.431	2.564.507	2.682.555	1,8%	-6,1%	8.558.066	6.458.944	7.083.817	2,4%	32,5%
<b>Total</b>	<b>931.885.375</b>	<b>1.054.944.077</b>	<b>1.192.180.203</b>		<b>-11,7%</b>	<b>131.152.373</b>	<b>119.078.434</b>	<b>149.072.145</b>		<b>10,1%</b>	<b>352.266.330</b>	<b>293.584.098</b>	<b>340.064.731</b>		<b>20,0%</b>

Source: MDIC/SECEX - Prepared by: CICB

## ■ ANALYSIS OF DESTINATIONS

The three main destinations for Brazilian leather show the following information in the year to date:

- China (without HK) has a share in value of 27.9% (previously 28.0%) and 38.2% (38.4%) in area, with a monetary increase of 8.8% (+6, 6%) and area of 37.8% (+35.6%).
- United States maintaining a share of 16.5% (16.5%) in value and 8.9% (8.9%) in area, shows drops of 21.6% (-23.6%) in value and 10.3% (-11.8%) in area.
- Italy with a share of 12.5% (12.3%) in value, and 15.5% (15.1%) in area, with drops of 34.9% (-37.0%) in value and 10.5% (-12.2%) in area.

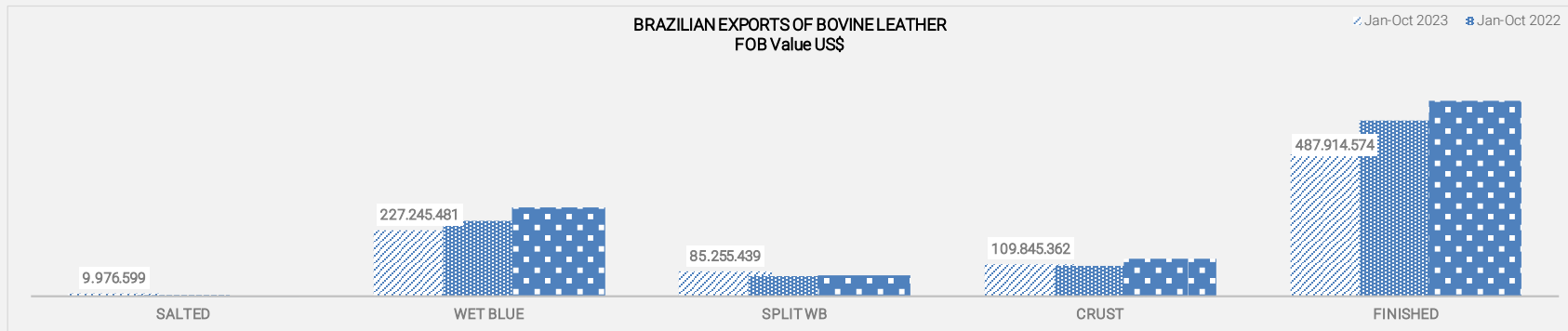
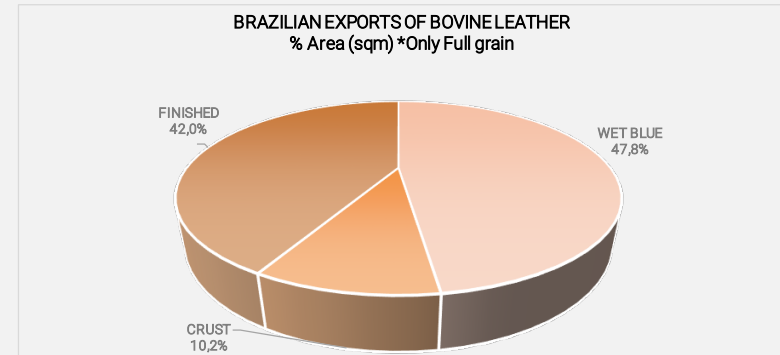
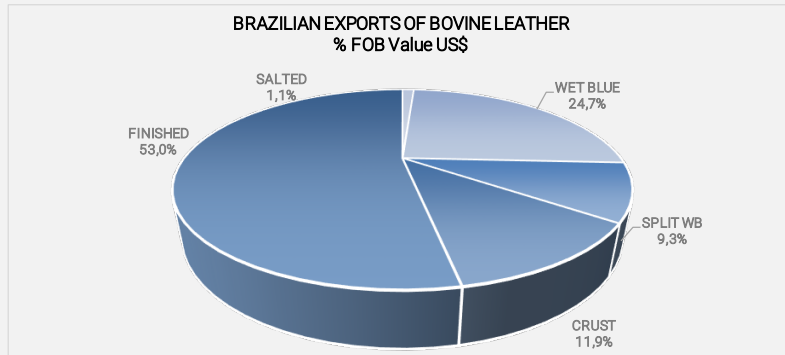
The three main markets improved their figures in October, compared to the previous month, despite the United States and Italy still maintaining negative indexes. China is the only destination, among the three largest, that continues at a positive pace, with increasing indicators of values and volumes.

Expanding the analysis to the TOP10, we have three countries with positive indexes: South Korea (+93.1% in value and +86.9% in area), Mexico (+15.1% and +79.8%) and Vietnam (+3.7% and +14.6%).

## BRAZILIAN EXPORTS OF BOVINE LEATHER BY TYPE

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Oct 2023	Jan-Oct 2022	Jan-Oct 2021	2023/2022	2023/2021	Jan-Oct 2023	Jan-Oct 2022	Jan-Oct 2021	2023/2022	2023/2021	Jan-Oct 2023	Jan-Oct 2022	Jan-Oct 2021	2023/2022	2023/2021
SALTED	9.976.599	4.623.591	2.353.007	115,8%	324,0%	-	-	-	-	-	23.771.928	8.394.737	5.095.990	183,2%	366,5%
WET BLUE	227.245.481	260.365.445	306.166.058	-12,7%	-25,8%	47.024.129	36.557.812	40.373.719	28,6%	16,5%	189.727.850	153.997.843	160.089.395	23,2%	18,5%
SPLIT WB	85.255.439	69.126.764	71.979.916	23,3%	18,4%	32.403.559	30.320.456	40.313.046	6,9%	-19,6%	92.154.725	84.208.454	113.597.116	9,4%	-18,9%
CRUST	109.845.362	104.050.865	128.722.975	5,6%	-14,7%	10.017.477	7.717.298	10.944.533	29,8%	-8,5%	9.751.562	7.932.811	10.371.538	22,9%	-6,0%
FINISHED	487.914.574	603.364.169	670.143.144	-19,1%	-27,2%	41.362.790	43.799.952	57.023.063	-5,6%	-27,5%	36.009.661	38.151.316	49.741.069	-5,6%	-27,6%
<b>Total</b>	<b>920.237.455</b>	<b>1.041.530.834</b>	<b>1.179.365.100</b>	<b>-11,6%</b>	<b>-22,0%</b>	<b>130.807.955</b>	<b>118.395.518</b>	<b>148.654.361</b>	<b>10,5%</b>	<b>-12,0%</b>	<b>351.415.726</b>	<b>292.685.161</b>	<b>338.895.108</b>	<b>20,1%</b>	<b>3,7%</b>

Source: MDIC/SECEX - Prepared by: CICB



## ■ ANALYSIS OF EXPORTS BY TYPE OF LEATHER

The following variations in Brazilian exports of bovine leather by type were registered between January and October of this year, compared to the same period in 2022:

- Wet blue with a reduction in value of 12.7% (-14.3%), but an increase of 28.6% (+28.4%) in area.
- Split WB shows an increase of 23.3% (+24.1%) in value, and 6.9% (+7.3%) in area.
- Crust with an increase of 5.6% (+4.2%) in value, and 29.8% (+27.3%) in area.
- Finished leather decreasing 19.1% (-20.4%) in value and 5.6% (-7.1%) in area.

Except for the exported value of finished leather (-4.6%), it was the first month in the year that all types of leather had increases in values and volumes, compared to the same month last year.

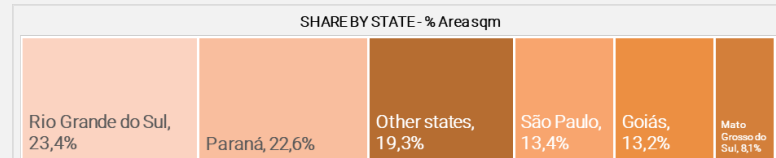
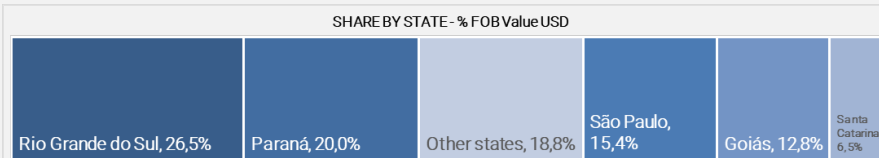
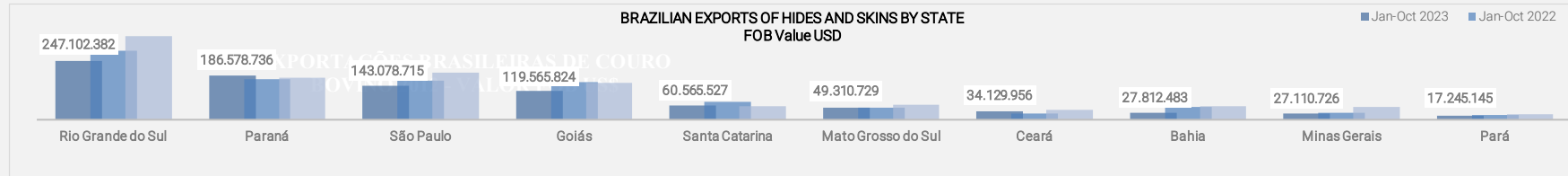
The price of salted hides exports continues to fall, reflecting the drop in total value, despite the increase in exported weight.



# EXPORTS OF HIDES AND SKINS BY STATE

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-Oct 2023	Jan-Oct 2022	Jan-Oct 2021	2023	2023/2022		Jan-Oct 2023	Jan-Oct 2022	Jan-Oct 2021	2023	2023/2022		Jan-Oct 2023	Jan-Oct 2022	Jan-Oct 2021	2023	2023/2022	
1 Rio Grande do Sul	247.102.382	290.288.574	349.891.223	26,5%	-14,9%	30.722.912	30.524.375	43.321.005	23,4%	0,7%	67.775.968	57.254.372	75.765.177	19,2%	18,4%			
2 Paraná	186.578.736	168.948.328	176.692.666	20,0%	10,4%	29.695.751	21.983.548	23.348.123	22,6%	35,1%	82.621.161	57.945.478	59.605.339	23,5%	42,6%			
3 São Paulo	143.078.715	164.764.020	197.097.669	15,4%	-13,2%	17.564.714	16.234.117	22.855.490	13,4%	8,2%	37.074.217	31.434.297	44.732.252	10,5%	17,9%			
4 Goiás	119.565.824	158.704.972	155.056.511	12,8%	-24,7%	17.304.244	18.219.582	19.168.094	13,2%	-5,0%	51.914.053	51.459.605	54.307.536	14,7%	0,9%			
5 Santa Catarina	60.565.527	73.910.653	57.090.920	6,5%	-18,1%	7.340.395	8.192.217	7.456.284	5,6%	-10,4%	14.883.952	22.925.566	19.220.266	4,2%	-35,1%			
6 Mato Grosso do Sul	49.310.729	50.547.765	63.153.936	5,3%	-2,4%	10.612.520	7.568.285	8.655.214	8,1%	40,2%	37.056.015	28.302.233	31.760.335	10,5%	30,9%			
7 Ceará	34.129.956	27.069.279	41.698.169	3,7%	26,1%	3.218.260	1.820.771	4.046.389	2,5%	76,8%	4.732.683	2.509.861	5.359.322	1,3%	88,6%			
8 Bahia	27.812.483	54.163.399	56.542.881	3,0%	-48,7%	4.072.662	6.665.155	7.332.134	3,1%	-38,9%	8.581.793	11.403.382	13.914.698	2,4%	-24,7%			
9 Minas Gerais	27.110.726	29.506.886	53.004.450	2,9%	-8,1%	5.032.692	3.706.215	8.461.968	3,8%	35,8%	10.026.727	7.007.159	14.594.921	2,8%	43,1%			
10 Pará	17.245.145	19.012.629	23.440.687	1,9%	-9,3%	3.676.514	2.789.482	2.804.198	2,8%	31,8%	17.717.465	13.982.426	12.936.296	5,0%	26,7%			
11 Mato Grosso	5.366.235	6.527.310	7.711.522	0,6%	-17,8%	1.153.058	917.828	987.134	0,9%	25,6%	3.974.233	3.299.426	3.624.116	1,1%	20,5%			
12 Rio de Janeiro	4.633.293	4.224.500	4.442.622	0,5%	9,7%	145.132	68.421	92.321	0,1%	112,1%	329.591	40.712	84.138	0,1%	709,6%			
13 Rio Grande do Norte	2.894.699	1.242.172	129.965	0,3%	133,0%	0	0	0	0,0%	-	6.828.490	2.326.700	194.560	1,9%	193,5%			
14 Pernambuco	2.585.486	1.119.161	912.970	0,3%	131,0%	39.551	34.458	35.291	0,0%	14,8%	6.234.984	1.754.564	1.454.116	1,8%	255,4%			
15 Piauí	1.530.316	2.621.392	2.256.811	0,2%	-41,6%	79.013	149.898	183.307	0,1%	-47,3%	45.180	93.096	101.794	0,01%	-51,5%			
16 Tocantins	783.287	132.111	84.532	0,1%	492,9%	177.857	25.319	8.902	0,1%	602,5%	874.075	131.210	45.550	0,2%	566,2%			
17 Distrito Federal	585.874	451.156	1.747.512	0,1%	29,9%	120.659	73.386	207.064	0,1%	64,4%	641.495	367.750	1.006.347	0,2%	74,4%			
18 Maranhão	377.854	167.162	114.039	0,04%	126,0%	86.508	23.032	29.815	0,1%	275,6%	225.015	19.028	43.510	0,1%	1082,5%			
19 Amazonas	331.183	747.152	644.685	0,04%	-55,7%	62.272	82.011	78.914	0,05%	-24,1%	310.737	418.995	614.056	0,1%	-25,8%			
20 Rondônia	202.813	0	0	0,02%	-	47.554	0	0	0,0%	-	181.431	0	0	0,1%	-			
21 Paraíba	52.191	0	0	0,01%	-	0	0	0	0,0%	-	106.000	0	0	0,03%	-			
22 Amapá	31.371	766.065	403.026	0,003%	-95,9%	0	0	0	0,0%	-	131.000	908.055	700.180	0,04%	-85,6%			
23 Espírito Santo	10.550	28.026	62.313	0,001%	-62,4%	105	268	482	0,000%	-60,8%	65	149	209	0,000%	-56,4%			
24 Not Declared *	0	1.365	1.103	0,0%	-100,0%	0	66	16	0,0%	-100,0%	0	34	13	0,0%	-100,0%			
<b>Total</b>	<b>931.885.375</b>	<b>1.054.944.077</b>	<b>1.192.180.203</b>	<b>100,0%</b>	<b>-11,7%</b>	<b>131.152.373</b>	<b>119.078.434</b>	<b>149.072.145</b>	<b>100,0%</b>	<b>10,1%</b>	<b>352.266.330</b>	<b>293.584.098</b>	<b>340.064.731</b>	<b>100,0%</b>	<b>20,0%</b>			

Source: SECEX - Prepared by CIBC - \*Advanced shipping, without prior information on the state of origin by the exporter



## ■ ANALYSIS OF STATES

Exports from Brazilian states present, in these ten months, the following highlights:

- The states of Ceará and Paraná remain the only states with positive indexes in values: +26.1% and +10.4%, respectively. With bigger drops, Bahia (-48.7%) and Goiás (-24.7%) are the negative highlights.
- Considering the traded area, we now have only three states with negative indexes: Bahia (-38.9%), Santa Catarina (-10.4%) and Goiás (-5.0%). The positive focus is Ceará, with +76.8%.
- Among the other states, Tocantins, Rio Grande do Norte, Pernambuco and Maranhão show significant growth in values and volumes.
- The ranking did not change, with Rio Grande do Sul leading in value (26.5% share) and area (23.4%), followed by Paraná (20.0% in value and 22.6% in area). Paraná is ahead of RS only in weight, with 42.6% against 18.4% for Gauchos.

## ■ CLOSING REMARKS

For the first time in the year, the monthly value of the sector's exports exceeded the corresponding month of 2022. Even though small, the 1.4% increase must be highlighted, as it also reflects a certain stability in the average prices of total exports (+1.0%), reversing the downward trend of recent months. Despite this improvement, there was a slight drop of 0.4% compared to the immediately previous month.

This increase in value was followed by important increases in volumes, both in area (+14.8%) and weight (+21.9%), always in the annual comparison.

The technical press reports that many tanneries in Asia, specialized in the leather footwear sector and working with exports, have reduced their operations, and are working at around 60% of normal production due to a lack of orders. On the other hand, the situation in the upholstery and automotive leather sector is better but is also full of uncertainty in light of changes in global trade. –