



BRAZILIAN EXPORTS OF HIDES AND SKINS

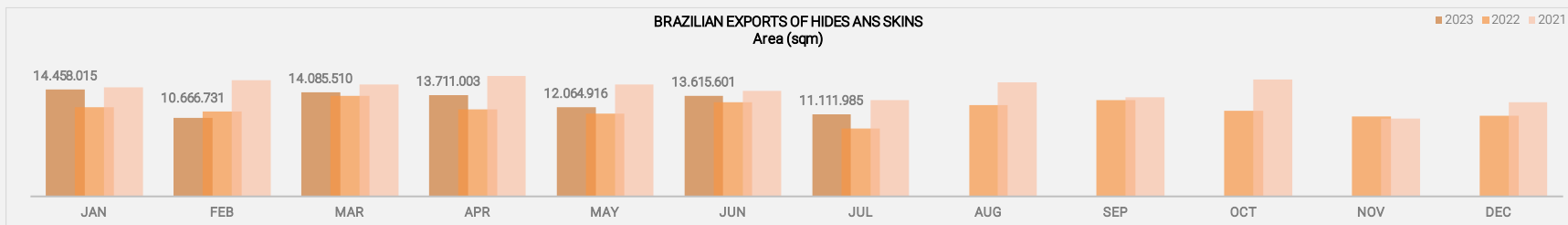
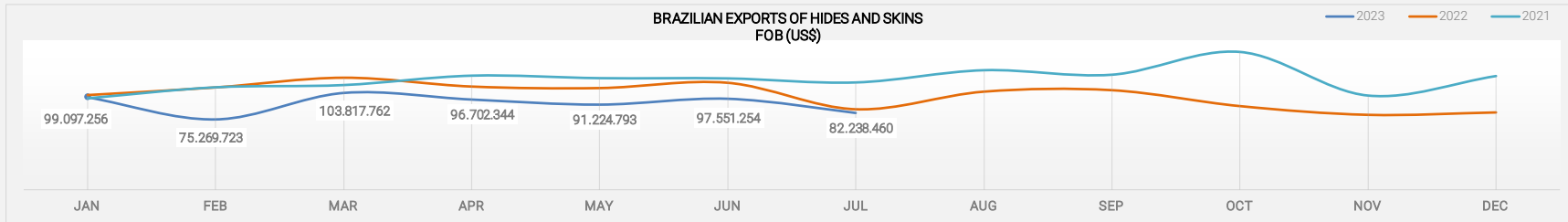
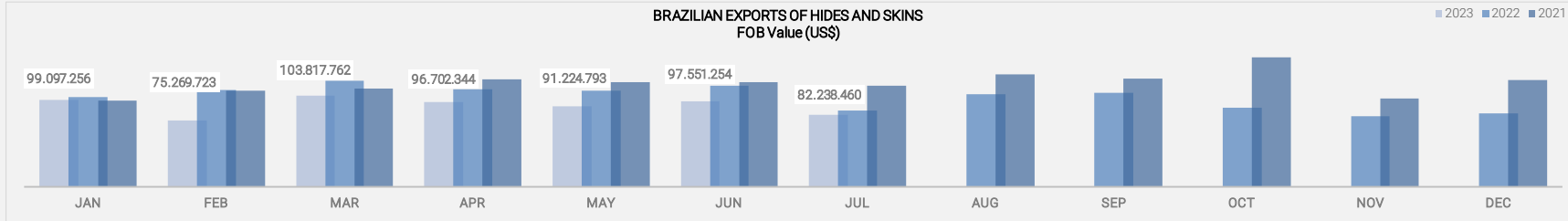
July 2023

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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	103.817.762	120.139.328	111.927.496	37,9%	-13,6%	-7,2%	14.085.510	13.625.210	15.133.632	32,1%	3,4%	-6,9%	36.975.642	31.859.528	34.265.446	24,2%	16,1%	7,9%
APR	96.702.344	110.738.209	121.951.096	-6,9%	-12,7%	-20,7%	13.711.003	11.773.200	16.318.524	-2,7%	16,5%	-16,0%	35.454.984	28.030.076	36.417.387	-4,1%	26,5%	-2,6%
MAY	91.224.793	109.124.938	119.279.811	-5,7%	-16,4%	-23,5%	12.064.916	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	97.551.254	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	82.238.460	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		105.318.890	127.753.281					12.398.155	15.456.776					32.250.962	31.412.555			
SEP		106.870.559	122.947.850					12.998.266	13.406.581					35.798.746	32.398.066			
OCT		89.944.558	147.230.475					11.595.103	15.861.118					30.269.139	35.079.112			
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			
Total	645.901.592	1.218.838.305	1.414.447.447		-14,2%	-18,7%	89.713.761	140.749.731	172.306.969		9,3%	-14,0%	237.961.835	354.537.869	395.578.583		21,9%	-1,3%

Source: SECEX - Prepared by: CICB



■ ANALYSIS OF TOTAL EXPORTS

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Exports of hides and skins presented by SECEX (Secretariat of Foreign Trade) of the Ministry of Development, Industry, Commerce and Services and analyzed by the CICB, referring to the month of July 2023, registered a value of US\$ 82.2 million, representing drops of 15.7% over the previous month, and 5.0% over the same month last year, when exports totaled US\$ 86.6 million.

Considering volume, 11.1 million square meters and 29.6 thousand tons were exported, which meant, respectively, increases of 21.2% and 35.4% over the same month of 2022. Compared to June, there were decreases 18.4% in area and 13.1% in weight.

The period from January to July totaled US\$ 645.9 million, 14.2% below the same period of 2022, but with increases of 9.3% in traded area and 21.9% in weight.

BRAZILIAN EXPORTS OF HIDES AND SKINS BY DESTINATION

COUNTRIES	FOB VALUE (US\$)			Share		AREA (sqm)			Share		WEIGHT (KG)			Share	
	Jan-Jul 2023	Jan-Jul 2022	Jan-Jul 2021	2023	2023/2022	Jan-Jul 2023	Jan-Jul 2022	Jan-Jul 2021	2023	2023/2022	Jan-Jul 2023	Jan-Jul 2022	Jan-Jul 2021	2023	2023/2022
1 China + Hong Kong	201.437.390	214.642.996	270.532.283	31,2%	-6,2%	38.072.238	30.386.293	41.151.873	42,4%	25,3%	113.730.680	81.105.295	107.165.269	47,8%	40,2%
China	180.757.668	173.671.620	235.637.008	28,0%	4,1%	34.132.308	25.652.554	36.929.065	38,0%	33,1%	103.799.502	69.007.881	95.800.696	43,6%	50,4%
2 United States	106.752.937	142.064.950	117.687.727	16,5%	-24,9%	7.986.760	9.128.094	9.808.983	8,9%	-12,5%	7.092.382	7.885.059	8.416.139	3,0%	-10,1%
3 Italy	77.287.152	126.345.636	115.685.208	12,0%	-38,8%	13.127.515	14.983.507	15.136.018	14,6%	-12,4%	41.887.944	49.824.537	49.841.285	17,6%	-15,9%
4 Vietnam	37.830.234	40.035.731	58.683.485	5,9%	-5,5%	7.585.741	6.892.080	11.869.254	8,5%	10,1%	18.232.576	16.515.597	26.701.499	7,7%	10,4%
5 Mexico	30.184.665	14.486.865	22.174.756	4,7%	108,4%	2.832.256	1.434.192	2.048.397	3,2%	97,5%	3.313.928	3.226.917	2.809.884	1,4%	2,7%
6 South Korea	28.459.905	26.114.344	26.308.161	4,4%	9,0%	2.792.020	1.582.038	1.640.481	3,1%	76,5%	3.947.166	1.563.436	1.495.102	1,7%	152,5%
7 Thailand	23.875.054	28.397.265	22.505.205	3,7%	-15,9%	2.451.966	2.033.554	2.127.443	2,7%	20,6%	4.479.709	3.438.893	3.815.788	1,9%	30,3%
Hong Kong	20.679.722	40.971.376	34.895.275	3,2%	-49,5%	3.939.930	4.733.739	4.222.808	4,4%	-16,8%	9.931.178	12.097.414	11.364.573	4,2%	-17,9%
8 Germany	19.373.612	31.910.217	29.294.639	3,0%	-39,3%	1.470.499	2.169.316	2.614.267	1,6%	-32,2%	1.247.385	1.797.138	2.364.634	0,5%	-30,6%
9 Hungary	13.107.150	13.508.532	16.712.458	2,0%	-3,0%	1.054.040	913.945	1.340.762	1,2%	15,3%	912.006	842.179	1.236.491	0,4%	8,3%
10 Taiwan	9.584.639	11.274.420	13.436.909	1,5%	-15,0%	2.369.109	2.794.600	4.284.503	2,6%	-15,2%	6.865.249	6.894.089	10.910.197	2,9%	-0,4%
11 Argentina	7.060.196	6.752.291	4.296.209	1,1%	4,6%	513.347	506.732	465.151	0,6%	1,3%	611.469	543.844	423.903	0,3%	12,4%
12 Tunisia	6.880.554	5.167.816	6.650.757	1,1%	33,1%	438.300	322.468	448.093	0,5%	35,9%	676.079	508.334	699.255	0,3%	33,0%
13 Uruguay	6.378.440	4.409.089	5.834.273	1,0%	44,7%	781.264	628.123	925.014	0,9%	24,4%	2.728.343	2.383.866	2.836.272	1,1%	14,5%
14 Netherlands	6.331.110	7.586.975	6.994.411	1,0%	-16,6%	637.888	613.891	633.301	0,7%	3,9%	618.440	566.959	604.623	0,3%	9,1%
15 Spain	5.395.287	2.875.839	5.038.332	0,8%	87,6%	1.380.141	946.102	2.233.657	1,5%	45,9%	3.962.991	2.665.851	6.154.408	1,7%	48,7%
16 Slovakia	4.935.256	977.490	272.571	0,8%	404,9%	310.206	48.837	23.417	0,3%	535,2%	306.391	65.625	16.750	0,1%	366,9%
17 India	4.767.801	8.628.195	6.373.498	0,7%	-44,7%	998.357	913.416	811.681	1,1%	9,3%	3.234.432	3.261.074	2.141.292	1,4%	-0,8%
18 Norway	4.492.213	6.253.695	7.697.865	0,7%	-28,2%	311.589	349.811	510.623	0,3%	-10,9%	219.224	248.294	379.797	0,1%	-11,7%
19 Turkey	3.830.731	617.351	155.191	0,6%	520,5%	62.106	18.794	10.038	0,1%	230,5%	8.182.515	919.271	90.260	3,4%	790,1%
20 Poland	3.583.197	5.409.461	3.997.980	0,6%	-33,8%	328.015	476.313	386.046	0,4%	-31,1%	265.531	402.793	302.970	0,1%	-34,1%
21 Malaysia	3.041.954	4.179.044	4.786.714	0,5%	-27,2%	232.994	280.902	376.893	0,3%	-17,1%	184.133	231.823	296.090	0,1%	-20,6%
22 France	2.807.593	3.541.661	859.714	0,4%	-20,7%	120.980	139.512	41.736	0,1%	-13,3%	178.063	221.942	65.292	0,1%	-19,8%
23 Portugal	2.794.178	2.758.192	3.763.892	0,4%	1,3%	278.087	242.371	401.621	0,3%	14,7%	724.599	538.511	649.842	0,3%	34,6%
24 Switzerland	2.718.966	1.997.909	4.147.772	0,4%	36,1%	611.763	618.087	922.825	0,7%	-1,0%	2.262.679	2.334.921	2.326.187	1,0%	-3,1%
25 Canada	2.679.714	2.851.549	3.077.509	0,4%	-6,0%	163.634	166.682	202.245	0,2%	-1,8%	146.801	159.341	179.444	0,1%	-7,9%
26 Japan	2.657.180	1.518.809	1.091.041	0,4%	75,0%	232.100	112.878	190.650	0,3%	105,6%	326.966	263.146	536.652	0,1%	24,3%
27 Indonesia	2.619.379	12.970.779	9.175.992	0,4%	-79,8%	330.129	1.088.571	954.661	0,4%	-69,7%	249.239	846.781	915.873	0,1%	-70,6%
28 South Africa	2.603.551	2.192.237	3.922.985	0,4%	18,8%	274.941	260.719	437.749	0,3%	5,5%	403.418	291.830	787.458	0,2%	38,2%
29 Cambodia	2.123.139	1.215.273	1.313.161	0,3%	74,7%	176.733	49.009	225.940	0,2%	260,6%	1.372.255	52.499	564.430	0,6%	2513,9%
30 Chile	2.004.253	3.723.070	2.978.154	0,3%	-46,2%	252.649	404.924	365.731	0,3%	-37,6%	305.987	496.364	407.871	0,1%	-38,4%
Others (2023: +44 countries)	18.304.162	18.402.389	18.799.745	2,8%	-0,5%	1.536.394	1.581.149	1.758.617	1,7%	-2,8%	9.293.255	5.169.042	6.040.041	3,9%	79,8%
Total	645.901.592	752.810.070	794.248.597		-14,2%	89.713.761	82.086.910	104.347.670		9,3%	237.961.835	195.265.251	241.174.998		21,9%

Source: MDIC/SECEX - Prepared by: CIBC

■ ANALYSIS OF DESTINATIONS

The three main destinations for Brazilian leather show the following information in the period:

- China (without HK) has a share in value of 28.0% (before 27.7%) and 38.0% (37.4%) in area, now with a monetary increase of 4.1% (+2.3%), and area of 33.1% (+29.2%).
- United States with a share of 16.5% (16.7%) in value, and with 8.9% (9.0%) in area, shows decreases of 24.9% (-21.9%) in value and 12.5% (-8.3%) in area.
- Italy with a share of 12.0% (12.7%) in value, and with 14.6% (15.7%) in area, with drops of 38.8% (-41.0%) in value and 12.4% (-13.6%) in area.

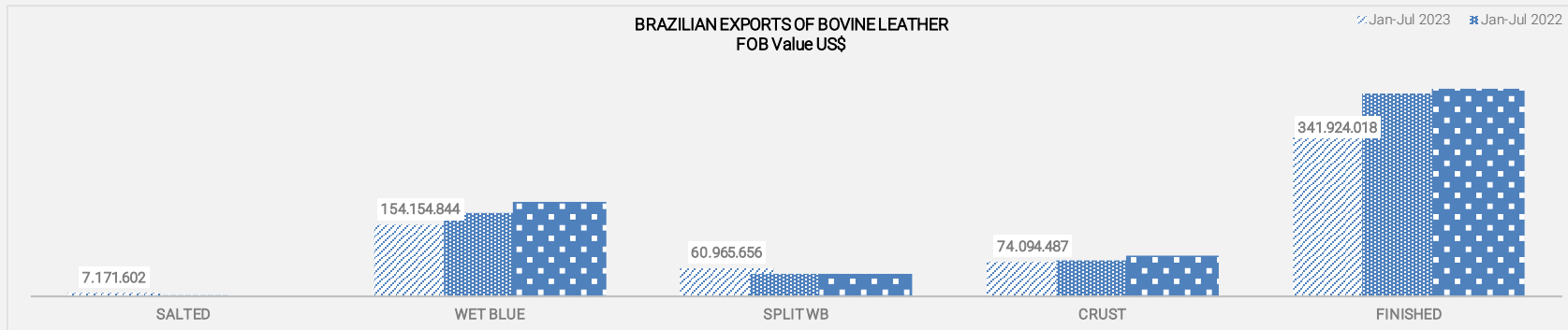
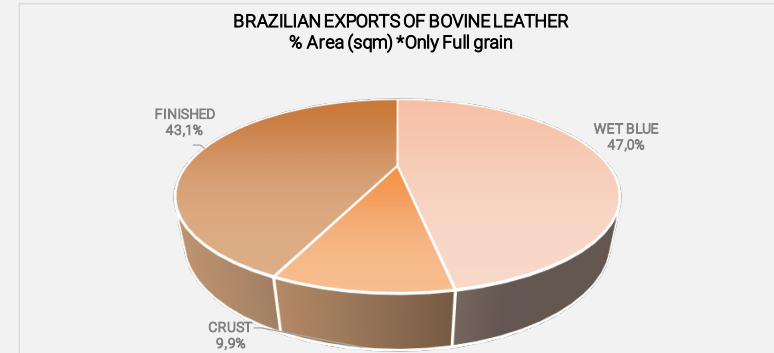
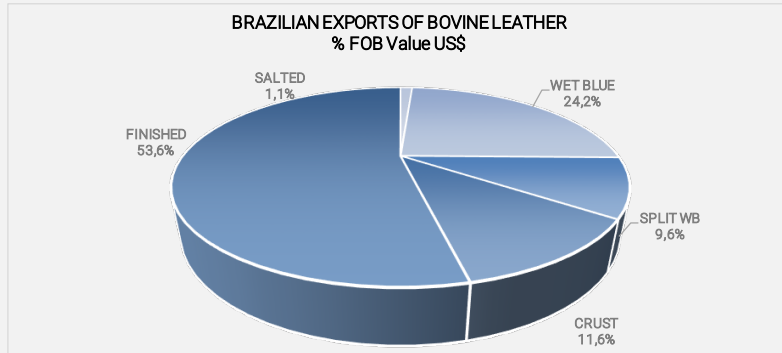
While China continues its trajectory of improvement in purchases of Brazilian leather, increasing share and improving value and volume indexes, the United States and Italy reduce share. Italy, despite this share reduction, shows a slight improvement in the annual comparison, while the United States accentuates the falls even more.

Among the TOP10, the highlight is exports to South Korea, which doubles imports, with +108.4% in value and +97.5% in area. Mexico has a significant increase in volumes imported from Brazil (+76.5% in area and +152.5% in weight), but with a low monetary index (+9.0%).

BRAZILIAN EXPORTS OF BOVINE LEATHER BY TYPE

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Jul 2023	Jan-Jul 2022	Jan-Jul 2021	2023/2022	2023/2021	Jan-Jul 2023	Jan-Jul 2022	Jan-Jul 2021	2023/2022	2023/2021	Jan-Jul 2023	Jan-Jul 2022	Jan-Jul 2021	2023/2022	2023/2021
SALTED	7.171.602	2.845.531	1.677.139	152,0%	327,6%	-	-	-	-	-	16.177.383	4.707.982	4.179.607	243,6%	287,1%
WET BLUE	154.154.844	178.955.419	203.036.103	-13,9%	-24,1%	31.059.678	23.163.068	26.938.438	34,1%	15,3%	123.543.407	96.523.909	112.304.319	28,0%	10,0%
SPLIT WB	60.965.656	48.655.577	48.440.571	25,3%	25,9%	23.349.689	21.848.706	28.875.687	6,9%	-19,1%	66.190.141	60.392.916	81.094.963	9,6%	-18,4%
CRUST	74.094.487	77.621.079	87.398.949	-4,5%	-15,2%	6.541.718	5.710.132	7.984.539	14,6%	-18,1%	6.497.342	5.823.463	7.500.673	11,6%	-13,4%
FINISHED	341.924.018	435.518.488	445.018.416	-21,5%	-23,2%	28.526.614	31.145.194	40.243.749	-8,4%	-29,1%	25.015.086	27.231.104	35.365.731	-8,1%	-29,3%
Total	638.310.607	743.596.094	785.571.178	-14,2%	-18,7%	89.477.699	81.867.100	104.042.413	9,3%	-14,0%	237.423.359	194.679.374	240.445.293	22,0%	-1,3%

Source: MDIC/SECEX - Prepared by: CIOB



■ ANALYSIS OF EXPORTS BY TYPE OF LEATHER

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

- Wet blue with a reduction in value of 13.9% (-15.8%), but an increase of 34.1% (+32.0%) in area.
- Split WB with increases of 25.3% (+23.5%) in value, and 6.9% (+4.9%) in area.
- Crust with a drop of 4.5% (-5.9%) in value, and an increase of 14.6% (+12.4%) in area.
- Finished leather decreasing 21.5% (-22.0%) in value and 8.4% (-9.4%) in area.

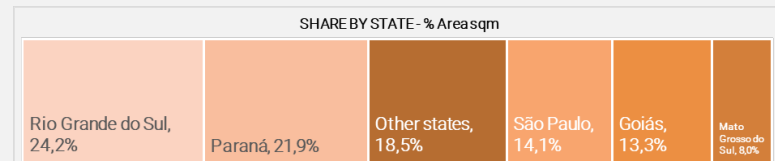
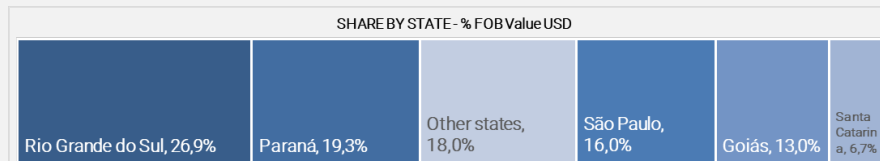
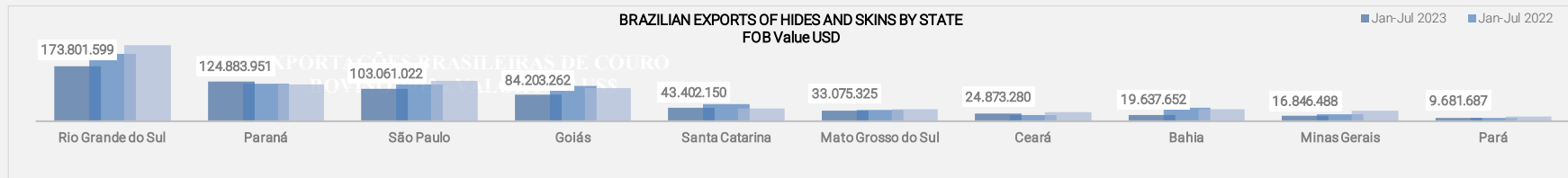
After the drop in exported area in June, the wet blue returned to surpass the same month of last year in this index, with +55.5%. It also had the first increase of the year in value (+7.6%), always in the annual comparison, despite levels well below the volume, still showing low prices. The wb split continued its positive trajectory in the year, with increases in both indexes.

Bovine salted hides have historically had the highest monthly shipment. Only in January 2014 was it surpassed in value.

EXPORTS OF HIDES AND SKINS BY STATE

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-Jul 2023	Jan-Jul 2022	Jan-Jul 2021	2023	2023/2022		Jan-Jul 2023	Jan-Jul 2022	Jan-Jul 2021	2023	2023/2022		Jan-Jul 2023	Jan-Jul 2022	Jan-Jul 2021	2023	2023/2022	
1 Rio Grande do Sul	173.801.599	212.638.786	240.139.141	26,9%	-18,3%	21.674.283	21.996.639	30.274.796	24,2%	-1,5%	48.038.541	41.446.076	55.430.344	20,2%	15,9%			
2 Paraná	124.883.951	119.382.227	115.284.645	19,3%	4,6%	19.687.492	14.952.284	16.043.282	21,9%	31,7%	54.449.965	38.364.476	41.032.118	22,9%	41,9%			
3 São Paulo	103.061.022	115.019.883	128.644.532	16,0%	-10,4%	12.647.984	10.983.837	16.014.668	14,1%	15,2%	27.284.027	19.987.403	32.158.095	11,5%	36,5%			
4 Goiás	84.203.262	110.669.111	104.522.144	13,0%	-23,9%	11.952.891	12.511.521	13.574.759	13,3%	-4,5%	35.489.157	35.040.695	37.341.145	14,9%	1,3%			
5 Santa Catarina	43.402.150	54.187.632	40.856.758	6,7%	-19,9%	4.973.345	5.670.415	5.655.853	5,5%	-12,3%	9.746.264	15.943.381	14.964.996	4,1%	-38,9%			
6 Mato Grosso do Sul	33.075.325	35.132.620	38.358.245	5,1%	-5,9%	7.173.601	4.757.932	5.718.556	8,0%	50,8%	25.168.300	17.405.006	20.475.118	10,6%	44,6%			
7 Ceará	24.873.280	18.534.892	28.047.702	3,9%	34,2%	2.304.717	1.207.979	2.769.189	2,6%	90,8%	3.413.455	1.452.228	3.486.535	1,4%	135,0%			
8 Bahia	19.637.652	42.757.613	37.322.234	3,0%	-54,1%	3.016.651	5.014.141	5.474.318	3,4%	-39,8%	5.398.217	8.473.214	11.085.906	2,3%	-36,3%			
9 Minas Gerais	16.846.488	21.072.428	33.330.525	2,6%	-20,1%	3.149.507	2.680.192	5.714.470	3,5%	17,5%	6.423.163	4.318.011	9.936.388	2,7%	48,8%			
10 Pará	9.681.687	10.679.559	14.340.936	1,5%	-9,3%	1.964.467	1.387.692	1.810.894	2,2%	41,6%	9.647.022	6.725.224	8.481.895	4,1%	43,4%			
11 Mato Grosso	3.123.101	4.970.714	5.727.079	0,5%	-37,2%	667.068	617.119	787.221	0,7%	8,1%	2.249.346	2.438.866	3.039.912	0,9%	-7,8%			
12 Rio de Janeiro	2.839.906	2.759.797	2.735.483	0,4%	2,9%	75.146	52.345	52.728	0,1%	43,6%	197.461	33.106	56.848	0,1%	496,5%			
13 Rio Grande do Norte	2.075.337	898.060	110.398	0,3%	131,1%	0	0	0	0,0%	-	4.749.590	1.649.500	140.560	2,0%	187,9%			
14 Pernambuco	1.747.958	659.845	671.524	0,3%	164,9%	31.779	23.817	23.953	0,04%	33,4%	4.091.355	616.603	1.374.688	1,7%	563,5%			
15 Piauí	1.068.344	1.736.723	1.667.711	0,2%	-38,5%	55.215	96.950	141.022	0,1%	-43,0%	32.626	53.679	81.196	0,01%	-39,2%			
16 Tocantins	572.305	21.692	84.532	0,1%	2538,3%	134.962	4.750	8.902	0,2%	2741,3%	651.630	21.285	45.550	0,3%	2961,5%			
17 Distrito Federal	385.410	216.110	1.397.989	0,1%	78,3%	79.666	33.557	174.204	0,1%	137,4%	421.045	167.570	845.707	0,2%	151,3%			
18 Maranhão	293.237	98.223	114.039	0,05%	198,5%	63.087	13.520	29.815	0,1%	366,6%	153.490	10.916	43.510	0,1%	1306,1%			
19 Rondônia	143.375	0	0	0,02%	-	37.068	0	0	0,04%	-	131.676	0	0	0,1%	-			
20 Amazonas	123.462	747.152	591.485	0,02%	-83,5%	24.727	82.011	78.914	0,0%	-69,8%	119.440	418.995	613.613	0,1%	-71,5%			
21 Paraíba	52.191	0	0	0,01%	-	0	0	0	0,0%	-	106.000	0	0	0,04%	-			
22 Espírito Santo	10.550	15.606	13.598	0,002%	-32,4%	105	143	126	0,000%	-26,6%	65	78	54	0,000%	-16,7%			
21 Amapá	0	610.032	287.897	0,0%	-100,0%	0	0	0	0,0%	-	0	698.905	540.820	0,0%	-100,0%			
22 Not Declared *	0	1.365	0	0,0%	-100,0%	0	66	0	0,0%	-100,0%	0	34	0	0,0%	-100,0%			
Total	645.901.592	752.810.070	794.248.597	100,0%	-14,2%	89.713.761	82.086.910	104.347.670	100,0%	9,3%	237.961.835	195.265.251	241.174.998	100,0%	21,9%			

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



■ ANALYSIS OF STATES

Exports from Brazilian states have, in these seven months, the following highlights:

- Among the ten largest exporters, the states of Ceará and Paraná continue with positive indexes in values: +34.2% and +4.6%, respectively. The negative highlight continues to be Bahia, with -54.1%.
- Regarding the traded area of the TOP10, we have six states with positive indexes, with the biggest increase being Ceará (+90.8%), followed by Mato Grosso do Sul (+50.8%) and Pará (+41.6%).
- Among the other states, we have significant growth in exports from four of them: Rio Grande do Norte (+131.1% in value and +187.9% in weight), Pernambuco (+164.9% in value and +33.4% in area), Tocantins (+2538.3% in value and 2741.3% in area) and Maranhão (+198.5% in value and +366.6% in area).
- The ranking of value and volume remains unchanged, with Rio Grande do Sul in the lead (26.9% in value and 24.2% in area), followed by Paraná (19.3% in value and 21.9% in area).

■ CLOSING REMARKS

The month of July was yet another period in which the sector exported hides and skins with increases in volumes, compared to the same month of last year, but with reductions in values, as a result of prices still at lower levels than in 2022. The increases of volumes were the highest of the year in both indicators, with +21.2% in area and +35.4% in weight.

Wet blue leather alone was exported 55.5% more in area, compared to July 2022, reaching +34.1% in the year. With this expressive growth, it was the first month of the year that this type of leather also saw an increase in value (+7.6%) in the annual comparison, after six months with declines.

As the first half of the year was complicated for the European tanning industry, and as Chinese buyers did not regularly participate in purchases, there are many doubts regarding the evolution of prices from September onwards. Many hope that the Shanghai fair at the end of August will bring more light, at least considering the Asian market. –