



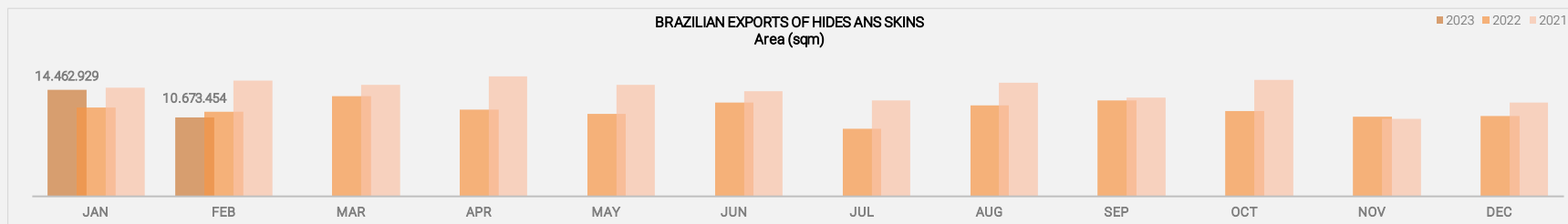
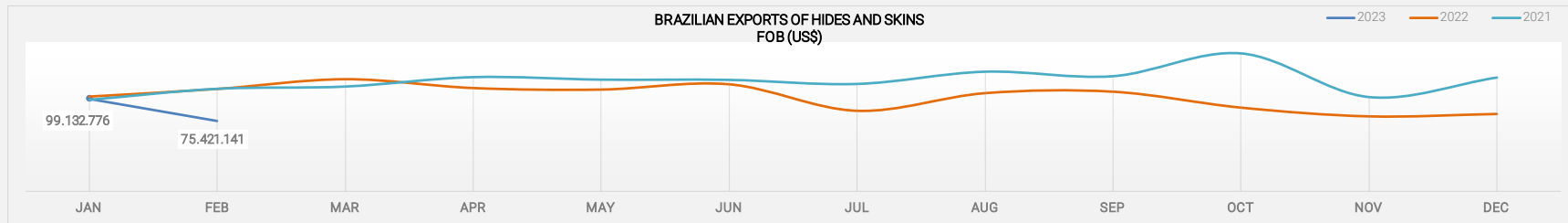
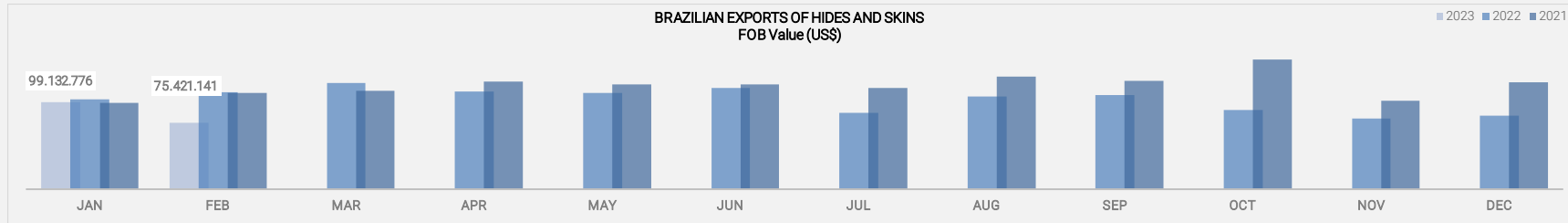
BRAZILIAN EXPORTS OF HIDES AND SKINS
February 2023

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	99.132.776	101.697.054	97.842.657	19,1%	-2,5%	1,3%	14.462.929	12.063.997	14.794.446	32,6%	19,9%	-2,2%	40.861.310	30.527.897	38.010.157	34,0%	33,8%	7,5%
FEB	75.421.141	109.794.363	109.528.720	-23,9%	-31,3%	-31,1%	10.673.454	11.518.363	15.698.373	-26,2%	-7,3%	-32,0%	29.781.690	25.501.700	38.218.258	-27,1%	16,8%	-22,1%
MAR		120.139.328	111.927.496					13.625.210	15.133.632					31.859.528	34.265.446			
APR		110.738.209	121.951.096					11.773.200	16.318.524					28.030.076	36.417.387			
MAY		109.124.938	119.279.811					11.199.958	15.163.923					24.982.739	33.656.700			
JUN		114.733.220	119.014.618					12.737.959	14.251.467					32.538.087	31.809.207			
JUL		86.582.958	114.704.199					9.168.223	12.987.305					21.825.224	28.797.843			
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	174.553.917	1.218.838.305	1.414.447.447		-17,5%	-15,8%	25.136.383	140.749.731	172.306.969		6,6%	-17,6%	70.643.000	354.537.869	395.578.583		26,1%	-7,3%

Source: SECEX - Prepared by: CICB



■ ANALYSIS OF TOTAL EXPORTS

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Exports of hides and skins presented by the SECEX (Secretariat of Foreign Trade) of the Ministry of Industry, Foreign Trade and Services and analyzed by CICB, referring to the month of February 2023, registered a value of US\$ 75.4 million, which means reductions of 23.9% over the previous month, and 31.3% compared to the same month last year, when US\$ 109.8 million were exported.

As for the total exported in square meters, 10.7 million were shipped in February, down 26.2% over January, and 7.3% over February last year, when the total was 11.5 million sqm.

The first two months of the year totaled US\$ 174.6 million, 17.5% less than in the same period of 2022, but 6.6% more in traded area, with 25.1 million square meters.

BRAZILIAN EXPORTS OF HIDES AND SKINS BY DESTINATION

COUNTRIES	FOB VALUE (US\$)			Share		AREA (sqm)		Share		WEIGHT (KG)			Share		
	Jan-Feb 2023	Jan-Feb 2022	Jan-Feb 2021	2023	2023/2022	Jan-Feb 2023	Jan-Feb 2022	Jan-Feb 2021	2023	2023/2022	Jan-Feb 2023	Jan-Feb 2022	Jan-Feb 2021	2023	2023/2022
1 China + Hong Kong	56.082.141	68.460.518	63.155.212	32,1%	-18,1%	10.835.657	10.104.378	10.973.146	43,1%	7,2%	34.247.835	26.373.540	29.401.944	48,5%	29,9%
China	52.399.910	56.262.839	56.440.964	30,0%	-6,9%	9.974.849	8.771.333	10.000.121	39,7%	13,7%	31.977.678	22.981.767	26.597.697	45,3%	39,1%
2 United States	28.253.923	39.199.368	29.810.210	16,2%	-27,9%	2.143.496	2.494.833	2.643.818	8,5%	-14,1%	1.895.920	2.172.915	2.283.198	2,7%	-12,7%
3 Italy	25.989.575	34.072.946	43.340.274	14,9%	-23,7%	4.706.157	4.064.912	6.478.095	18,7%	15,8%	16.809.935	14.026.203	23.097.261	23,8%	19,8%
4 Vietnam	9.075.260	10.521.621	14.272.845	5,2%	-13,7%	1.942.384	1.628.867	2.975.476	7,7%	19,2%	4.881.558	3.966.448	6.287.751	6,9%	23,1%
5 Thailand	7.296.276	5.926.416	7.261.131	4,2%	23,1%	707.908	418.230	757.310	2,8%	69,3%	1.078.519	550.883	1.386.308	1,5%	95,8%
6 Germany	6.544.629	8.738.538	8.370.237	3,7%	-25,1%	466.984	581.580	786.994	1,9%	-19,7%	392.561	482.655	694.079	0,6%	-18,7%
7 South Korea	6.093.098	4.171.957	2.625.209	3,5%	46,0%	642.396	422.280	272.386	2,6%	52,1%	877.504	884.361	351.221	1,2%	-0,8%
8 Mexico	5.847.464	9.095.732	5.977.686	3,3%	-35,7%	533.338	612.879	417.712	2,1%	-13,0%	677.261	676.485	451.062	1,0%	0,1%
Hong Kong	3.682.231	12.197.679	6.714.248	2,1%	-69,8%	860.808	1.333.045	973.025	3,4%	-35,4%	2.270.157	3.391.773	2.804.247	3,2%	-33,1%
9 Taiwan	2.935.612	2.725.613	2.899.031	1,7%	7,7%	671.035	487.362	1.278.143	2,7%	37,7%	2.077.053	1.178.459	3.509.142	2,9%	76,3%
10 Hungary	2.534.414	4.142.523	5.136.899	1,5%	-38,8%	198.130	276.400	427.930	0,8%	-28,3%	167.571	256.345	385.999	0,2%	-34,6%
11 Argentina	2.483.362	1.679.070	817.755	1,4%	47,9%	142.982	141.699	84.731	0,6%	0,9%	168.499	123.659	75.956	0,2%	36,3%
12 Norway	1.519.149	730.459	1.887.422	0,9%	108,0%	99.298	38.995	140.135	0,4%	154,6%	71.138	28.347	105.406	0,1%	151,0%
13 Slovakia	1.462.584	0	233.903	0,8%	-	87.581	0	21.198	0,3%	-	89.514	0	13.368	0,1%	-
14 Uruguay	1.458.394	729.488	1.607.176	0,8%	99,9%	166.301	116.841	291.387	0,7%	42,3%	640.746	554.020	839.741	0,9%	15,7%
15 Tunisia	1.429.334	1.317.629	1.692.261	0,8%	8,5%	87.277	88.216	108.721	0,3%	-1,1%	138.725	133.460	171.442	0,2%	3,9%
16 Poland	1.381.980	1.838.430	816.664	0,8%	-24,8%	126.562	158.673	91.804	0,5%	-20,2%	103.145	131.094	72.608	0,1%	-21,3%
17 Spain	1.217.271	798.383	1.528.468	0,7%	52,5%	353.739	318.474	631.930	1,4%	11,1%	937.181	863.368	1.703.322	1,3%	8,5%
18 Netherlands	1.093.738	2.595.524	1.811.259	0,6%	-57,9%	120.807	200.241	191.977	0,5%	-39,7%	112.022	181.408	171.296	0,2%	-38,2%
19 Malaysia	944.583	1.301.323	1.351.997	0,5%	-27,4%	70.389	90.962	113.985	0,3%	-22,6%	55.956	75.749	87.954	0,1%	-26,1%
20 Indonesia	930.307	1.857.772	2.117.732	0,5%	-49,9%	99.712	148.210	295.670	0,4%	-32,7%	77.419	112.585	222.591	0,1%	-31,2%
21 Turkey	919.175	0	0	0,5%	-	48.777	0	0	0,2%	-	1.779.596	0	0	2,5%	-
22 India	835.492	2.507.139	1.926.715	0,5%	-66,7%	186.147	216.568	358.733	0,7%	-14,0%	494.799	787.510	1.099.185	0,7%	-37,2%
23 Canada	705.206	655.853	733.186	0,4%	7,5%	43.851	40.411	50.737	0,2%	8,5%	35.166	35.930	41.886	0,05%	-2,1%
24 Dominican Republic	589.419	592.395	556.412	0,3%	-0,5%	91.496	65.178	71.609	0,4%	40,4%	295.932	212.098	229.076	0,4%	39,5%
25 South Africa	529.658	584.544	610.169	0,3%	-9,4%	54.365	70.087	58.333	0,2%	-22,4%	59.750	69.181	139.899	0,1%	-13,6%
26 France	528.058	724.048	147.811	0,3%	-27,1%	20.109	27.987	7.387	0,1%	-28,1%	31.681	44.321	11.526	0,04%	-28,5%
27 Japan	515.903	267.406	264.060	0,3%	92,9%	44.780	20.006	56.838	0,2%	123,8%	85.400	53.403	173.385	0,1%	59,9%
28 Portugal	489.626	666.186	976.821	0,3%	-26,5%	54.574	65.177	136.699	0,2%	-16,3%	152.522	186.643	229.190	0,2%	-18,3%
29 Bangladesh	473.877	0	0	0,3%	-	39.242	0	0	0,2%	-	75.038	0	0	0,1%	-
30 Chile	402.524	1.260.897	521.466	0,2%	-68,1%	68.306	150.754	80.181	0,3%	-54,7%	92.485	206.987	86.830	0,1%	-55,3%
Others (2023: +32 countries)	3.991.885	4.329.639	4.921.366	2,3%	-7,8%	282.603	532.160	689.754	1,1%	-46,9%	2.040.569	1.661.540	2.905.789	2,9%	22,8%
Total	174.553.917	211.491.417	207.371.377		-17,5%	25.136.383	23.582.360	30.492.819		6,6%	70.643.000	56.029.597	76.228.415		26,1%

Source: MDIC/SECEX - Prepared by: CICB

■ ANALYSIS OF DESTINATIONS

In the first two months of the year, the three main destinations for Brazilian leather show the following information:

- China (without HK) remains in the lead, with a share in value of 30.0% (previous 33.0%) and 39.7% (44.3%) in area, with a monetary reduction of 6.9 %, but an increase of 13.7% in area.

- United States with a share of 16.2% (16.3%) in value, and with 8.5% (8.2%) in area, showing drops of 27.9% (+22.1%) in value and 14.1% (+39.1%) in area.

- Italy with a share of 14.9% (15.6%) in value, and 18.7% (20.4%) in area, with reductions of 23.7% (20.9%) in value and increase 15.8% (25.0%) in area.

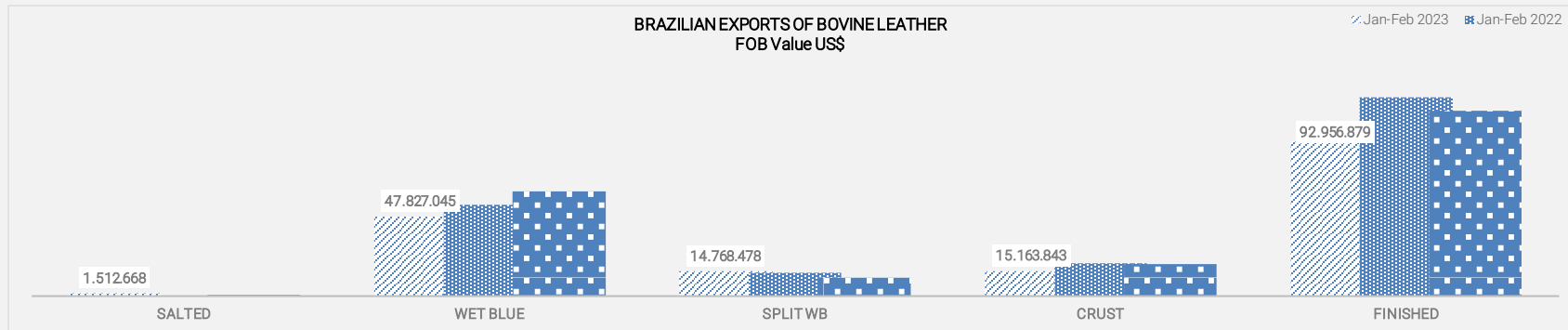
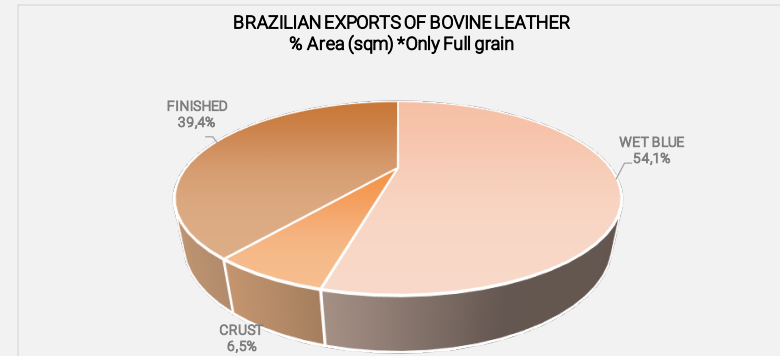
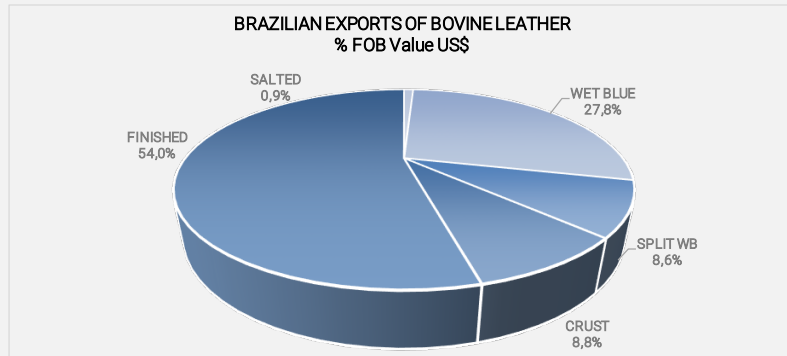
The three main destinations for Brazilian leather worsened their indexes with the February results, showing that they were the main responsible for the drop in sector exports this month. China and Italy still register increases in volume in the accumulated result for the year, indicating that they may be drivers of growth in the coming months.

Among the TOP10, some important increases in values and volumes are registered: Thailand (+23.1% and +69.3%, respectively), South Korea (+46.0% and +52.1%) and Taiwan (+7.7% and +37.7%).

BRAZILIAN EXPORTS OF BOVINE LEATHER BY TYPE

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Feb 2023	Jan-Feb 2022	Jan-Feb 2021	2023/2022	2023/2021	Jan-Feb 2023	Jan-Feb 2022	Jan-Feb 2021	2023/2022	2023/2021	Jan-Feb 2023	Jan-Feb 2022	Jan-Feb 2021	2023/2022	2023/2021
SALTED	1.512.668	422.222	558.619	258,3%	170,8%	-	-	-	-	-	3.452.617	696.160	1.750.938	396,0%	97,2%
WET BLUE	47.827.045	54.970.246	62.735.947	-13,0%	-23,8%	10.436.892	6.984.753	9.822.771	49,4%	6,3%	42.407.869	28.195.046	41.749.371	50,4%	1,6%
SPLIT WB	14.768.478	13.891.654	11.117.198	6,3%	32,8%	5.782.270	6.601.506	7.333.916	-12,4%	-21,2%	16.615.485	18.072.210	20.833.398	-8,1%	-20,2%
CRUST	15.163.843	19.845.680	19.428.551	-23,6%	-22,0%	1.252.947	1.448.862	2.069.981	-13,5%	-39,5%	1.325.605	1.439.488	1.946.735	-7,9%	-31,9%
FINISHED	92.956.879	119.387.299	111.458.019	-22,1%	-16,6%	7.612.818	8.485.629	11.180.392	-10,3%	-31,9%	6.627.764	7.396.981	9.761.114	-10,4%	-32,1%
Total	172.228.913	208.517.101	205.298.334	-17,4%	-16,1%	25.084.927	23.520.750	30.407.060	6,7%	-17,5%	70.429.340	55.799.885	76.041.556	26,2%	-7,4%

Source: MDIC/SECEX - Prepared by: CICB



■ ANALYSIS OF EXPORTS BY TYPE OF LEATHER

The following variations were registered in Brazilian exports of bovine leather by type, in the two-month period, compared to the same period in 2022:

- Wet Blue with a reduction in value of 13.0% (-6.1%), but an increase of 49.4% (+63.2%) in area.
- Split WB with increase of 6.3% (-8.6%) in value but decrease of 12.4% (-23.3%) in area.
- Crust with drops of 23.6% (-10.5%) in value, and 13.5% (+3.7%) in area.
- Finished leather decreasing 22.1% (+1.8%) in value and 10.3% (+16.3%) in area.

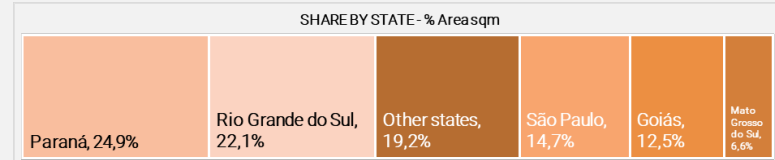
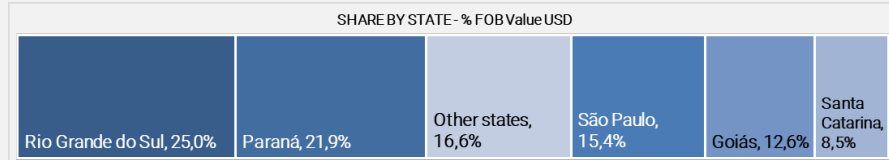
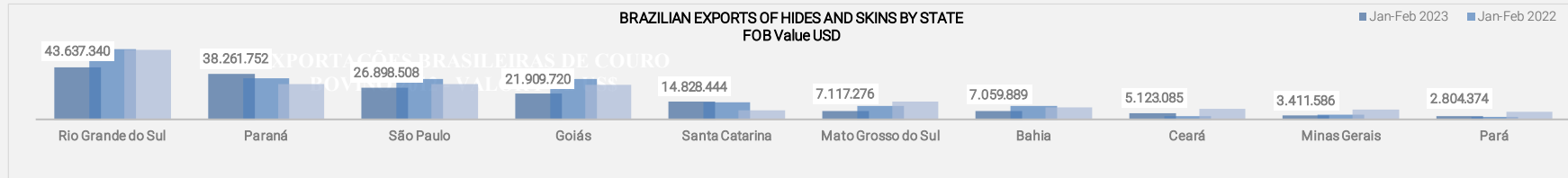
Even with increases in Wet Blue export volumes this month, price reductions have led to declines in monetary totals. Among the other types of leather, only Split WB shows improvements in value over the same period in 2022.

Salted hides continue to see strong increases in shipments, now more than tripling in value and almost quadrupling in volume.

EXPORTS OF HIDES AND SKINS BY STATE

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-Feb 2023	Jan-Feb 2022	Jan-Feb 2021	2023	2023/2022		Jan-Feb 2023	Jan-Feb 2022	Jan-Feb 2021	2023	2023/2022		Jan-Feb 2023	Jan-Feb 2022	Jan-Feb 2021	2023	2023/2022	
1 Rio Grande do Sul	43.637.340	58.852.068	58.693.086	25,0%	-25,9%	5.564.570	6.637.882	8.269.107	22,1%	-16,2%	13.429.693	13.112.937	15.615.329	19,0%	2,4%			
2 Paraná	38.261.752	34.422.483	29.819.440	21,9%	11,2%	6.252.882	3.955.611	4.617.894	24,9%	58,1%	19.043.940	10.380.620	12.645.295	27,0%	83,5%			
3 São Paulo	26.898.508	33.923.964	29.569.441	15,4%	-20,7%	3.687.665	3.623.145	4.300.602	14,7%	1,8%	8.766.027	6.511.883	9.311.089	12,4%	34,6%			
4 Goiás	21.909.720	34.249.674	28.975.812	12,6%	-36,0%	3.148.175	4.130.756	4.197.679	12,5%	-23,8%	10.143.508	11.844.503	11.958.219	14,4%	-14,4%			
5 Santa Catarina	14.828.444	14.141.731	7.420.293	8,5%	4,9%	1.594.095	1.363.488	1.162.388	6,3%	16,9%	3.093.725	2.972.543	2.509.218	4,4%	4,1%			
6 Mato Grosso do Sul	7.117.276	11.424.133	14.973.431	4,1%	-37,7%	1.653.042	1.488.249	2.318.275	6,6%	11,1%	5.991.715	5.492.382	9.350.810	8,5%	9,1%			
7 Bahia	7.059.889	11.405.284	10.219.849	4,0%	-38,1%	1.126.327	985.194	1.740.777	4,5%	14,3%	2.282.662	1.510.318	3.747.015	3,2%	51,1%			
8 Ceará	5.123.085	2.982.717	8.956.190	2,9%	71,8%	505.727	268.498	846.962	2,0%	88,4%	863.899	460.634	1.005.112	1,2%	87,5%			
9 Minas Gerais	3.411.586	3.939.074	8.311.966	2,0%	-13,4%	593.855	496.987	1.609.994	2,4%	19,5%	1.138.660	718.504	2.596.260	1,6%	58,5%			
10 Pará	2.804.374	2.037.579	6.278.783	1,6%	37,6%	600.259	260.310	905.335	2,4%	130,6%	2.929.846	1.242.302	4.250.172	4,1%	135,8%			
11 Mato Grosso	995.528	1.806.659	2.236.102	0,6%	-44,9%	227.460	230.159	369.519	0,9%	-1,2%	836.389	878.807	1.614.844	1,18%	-4,8%			
12 Rio de Janeiro	956.535	755.399	376.794	0,5%	26,6%	12.300	8.160	3.933	0,05%	50,7%	5.500	3.720	1.740	0,01%	47,8%			
13 Tocantins	376.484	0	0	0,2%	-	89.876	0	0	0,4%	-	431.710	0	0	0,6%	-			
14 Pernambuco	347.950	138.356	158.145	0,2%	151,5%	12.028	6.602	3.677	0,05%	82,2%	632.300	190.108	756.544	0,9%	232,6%			
15 Rio Grande do Norte	338.112	28.080	95.398	0,2%	1104,1%	0	0	0	0,0%	-	829.400	54.000	115.560	1,2%	1435,9%			
16 Piauí	251.505	489.088	624.468	0,1%	-48,6%	12.223	30.574	57.414	0,05%	-60,0%	7.764	15.334	36.352	0,01%	-49,4%			
17 Distrito Federal	146.087	83.571	307.067	0,1%	74,8%	29.203	15.238	46.125	0,1%	91,6%	155.165	72.900	222.567	0,2%	112,8%			
18 Maranhão	89.742	0	0	0,1%	-	26.696	0	0	0,1%	-	61.097	0	0	0,1%	-			
19 Amapá	0	124.005	88.017	0,0%	-100,0%	0	0	0	0,0%	-	0	149.550	215.730	0,0%	-100,0%			
20 Amazonas	0	687.552	264.957	0,0%	-100,0%	0	81.507	43.118	0,0%	-100,0%	0	418.552	276.550	0,0%	-100,0%			
21 Espírito Santo	0	0	2.138	0,0%	-	0	0	20	0,0%	-	0	0	9	0,0%	-			
Total	174.553.917	211.491.417	207.371.377	100,0%	-17,5%	25.136.383	23.582.360	30.492.819	100,0%	6,6%	70.643.000	56.029.597	76.228.415	100,0%	26,1%			

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 present, in these two months of the year, the following highlights:

- Considering the top ten exporters, now we only have value growth in four states, with the biggest highlight being Ceará, with +71.8%.
- Considering the traded area of the TOP10, the opposite occurs, with the majority registering increases in area and weight. Considering both items, the biggest increases were in Pará, with +130.6% in area and +135.8% in weight. The two states with decreases in area were Rio Grande do Sul (-16.2%) and Goiás (-23.8%).
- The ranking continues with Rio Grande do Sul in first place in value, while Paraná leads in volume.

■ CLOSING REMARKS

After January registered stability in value and an increase in area compared to the same month of 2022, February saw declines in both indicators. There was only an increase in exported weight.

Shipments to the largest market, China, continue to be higher in volume in this first two months, but price reductions for Wet Blue leather mean that the total in values becomes lower, compared to the accumulated result for the first two months of 2022.

Still on China, the good news released by the international press in recent weeks show that economic activity grew significantly in the country in January and February, mentioning that the official production index increased in February faster than in any month of the last decade. The announced increases in exports of manufactured goods from the world's largest industrial park reveal that we may see a resumption in purchases, with positive effects on the leather industry and on domestic exports in the sector. -