



# BRAZILIAN EXPORTS OF HIDES AND SKINS

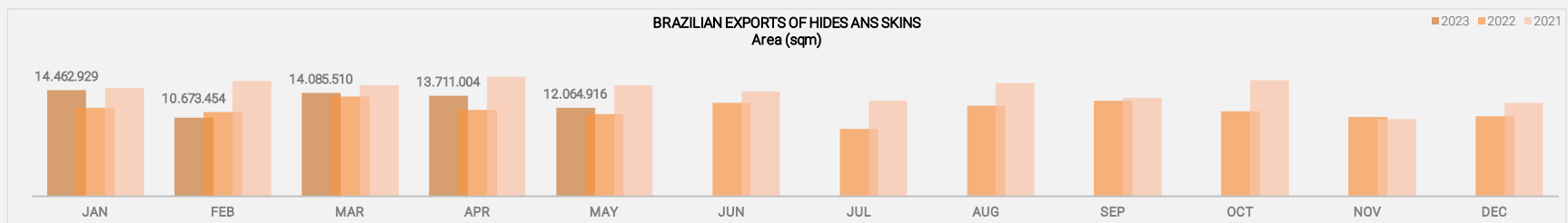
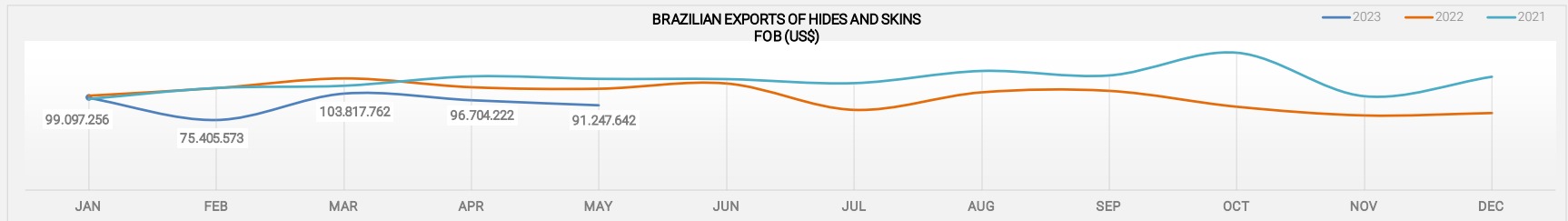
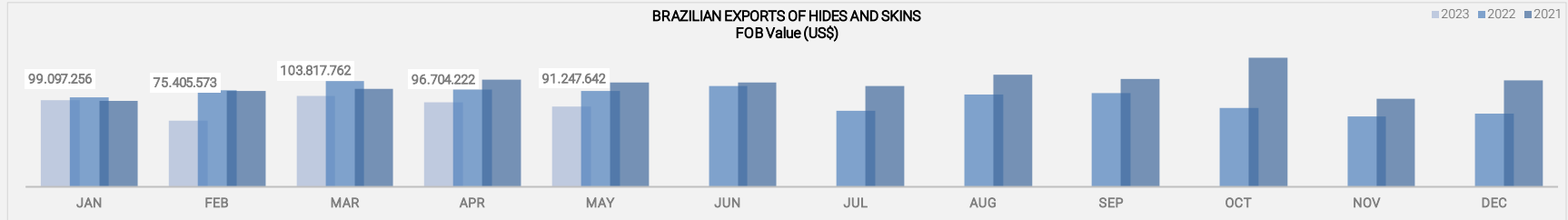
May 2023

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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%	14.462.929	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	75.405.573	109.794.363	109.528.720	-23,9%	-31,3%	-31,2%	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	103.817.762	120.139.328	111.927.496	37,7%	-13,6%	-7,2%	14.085.510	13.625.210	15.133.632	32,0%	3,4%	-6,9%	36.975.642	31.859.528	34.265.446	24,2%	16,1%	7,9%
APR	96.704.222	110.738.209	121.951.096	-6,9%	-12,7%	-20,7%	13.711.004	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	91.247.642	109.124.938	119.279.811	-5,6%	-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		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			
<b>Total</b>	<b>466.272.455</b>	<b>1.218.838.305</b>	<b>1.414.447.447</b>		<b>-15,5%</b>	<b>-16,8%</b>	<b>64.997.813</b>	<b>140.749.731</b>	<b>172.306.969</b>		<b>8,0%</b>	<b>-15,7%</b>	<b>174.413.313</b>	<b>354.537.869</b>	<b>395.578.583</b>		<b>23,8%</b>	<b>-3,4%</b>

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 the CICB, referring to the month of May 2023, registered a value of US\$ 91.2 million, representing decreases 5.6% over the previous month, and 16.4% over the same month last year, when US\$ 109.1 million were exported.

As for the total exported in square meters, 12.1 million were shipped in May, a volume 7.7% higher than the same month last year, but 12.0% less than April, when the total was 13.7 million sqm.

The first five months of the year totaled US\$ 466.3 million, a decrease of 15.5% over the same period of 2022, but 8.0% more in traded area, with 65.0 million square meters.

## BRAZILIAN EXPORTS OF HIDES AND SKINS BY DESTINATION

COUNTRIES	FOB VALUE (US\$)			Share		AREA (sqm)			Share		WEIGHT (KG)			Share	
	Jan-May 2023	Jan-May 2022	Jan-May 2021	2023	2023/2022	Jan-May 2023	Jan-May 2022	Jan-May 2021	2023	2023/2022	Jan-May 2023	Jan-May 2022	Jan-May 2021	2023	2023/2022
1 China + Hong Kong	145.973.281	162.561.443	184.329.089	31,3%	-10,2%	27.611.114	23.024.727	28.922.947	42,5%	19,9%	84.085.549	61.019.935	75.215.249	48,2%	37,8%
China	132.204.416	133.217.831	160.936.682	28,4%	-0,8%	24.827.419	19.776.885	25.970.986	38,2%	25,5%	76.785.487	52.938.195	67.286.898	44,0%	45,0%
2 United States	77.950.455	102.748.019	81.977.402	16,7%	-24,1%	5.913.216	6.536.782	6.967.071	9,1%	-9,5%	5.248.930	5.594.569	6.003.858	3,0%	-6,2%
3 Italy	59.215.936	94.033.617	91.546.157	12,7%	-37,0%	10.358.955	11.047.780	12.548.149	15,9%	-6,2%	34.566.969	36.337.233	42.268.619	19,8%	-4,9%
4 Vietnam	23.632.862	28.567.298	41.307.777	5,1%	-17,3%	4.796.125	4.788.050	9.266.400	7,4%	0,2%	11.420.236	11.363.731	20.613.997	6,5%	0,5%
5 Mexico	21.027.446	16.984.635	17.831.720	4,5%	23,8%	2.033.475	1.060.228	1.153.840	3,1%	91,8%	2.807.092	1.065.511	1.083.004	1,6%	163,5%
6 South Korea	20.848.801	11.676.718	13.768.443	4,5%	78,6%	2.003.984	1.138.747	1.297.722	3,1%	76,0%	2.528.925	2.440.586	1.612.409	1,5%	3,6%
7 Thailand	17.511.692	20.058.820	14.976.447	3,8%	-12,7%	1.854.987	1.416.481	1.460.396	2,9%	31,0%	3.643.276	2.165.764	2.884.395	2,1%	68,2%
8 Germany	13.800.454	24.813.499	23.672.164	3,0%	-44,4%	1.050.308	1.673.051	2.139.255	1,6%	-37,2%	896.586	1.380.774	1.887.025	0,5%	-35,1%
Hong Kong	13.768.865	29.343.612	23.392.407	3,0%	-53,1%	2.783.695	3.247.842	2.951.961	4,3%	-14,3%	7.300.062	8.081.740	7.928.351	4,2%	-9,7%
9 Hungary	9.780.872	9.746.052	12.702.209	2,1%	0,4%	770.427	667.168	1.045.894	1,2%	15,5%	673.787	618.870	949.704	0,4%	8,9%
10 Taiwan	6.525.616	8.473.921	10.407.828	1,4%	-23,0%	1.483.915	1.992.585	3.411.628	2,3%	-25,5%	4.436.737	4.560.170	8.633.983	2,5%	-2,7%
11 Argentina	5.334.247	4.219.856	2.492.639	1,1%	26,4%	373.168	340.409	287.196	0,6%	9,6%	422.793	328.240	250.846	0,2%	28,8%
12 Uruguay	4.708.861	2.704.655	3.972.047	1,0%	74,1%	559.725	421.289	637.314	0,9%	32,9%	2.109.742	1.560.535	2.076.124	1,2%	35,2%
13 Tunisia	4.569.320	2.953.126	4.399.540	1,0%	54,7%	293.206	197.968	306.104	0,5%	48,1%	445.200	304.756	475.239	0,3%	46,1%
14 Netherlands	4.110.688	5.738.828	4.492.341	0,9%	-28,4%	422.781	467.082	430.641	0,7%	-9,5%	408.906	427.709	400.578	0,2%	-4,4%
15 Norway	3.919.570	3.773.250	5.537.640	0,8%	3,9%	267.189	209.190	385.802	0,4%	27,7%	189.277	151.486	288.577	0,1%	24,9%
16 Spain	3.860.643	2.144.339	4.248.931	0,8%	80,0%	1.050.775	703.432	1.810.687	1,6%	49,4%	3.105.036	1.885.898	4.938.876	1,8%	64,6%
17 Slovakia	3.560.877	950.632	237.103	0,8%	274,6%	219.145	47.316	21.396	0,3%	363,2%	221.692	64.106	13.542	0,1%	245,8%
18 India	3.112.562	5.671.899	5.370.234	0,7%	-45,1%	584.446	536.927	718.120	0,9%	8,9%	1.801.976	1.939.486	1.905.120	1,0%	-7,1%
19 Poland	2.716.296	4.203.547	2.843.234	0,6%	-35,4%	251.151	366.508	282.168	0,4%	-31,5%	202.266	305.732	218.555	0,1%	-33,8%
20 Indonesia	2.303.956	9.220.869	7.118.703	0,5%	-75,0%	287.223	753.277	786.687	0,4%	-61,9%	216.271	586.152	640.215	0,1%	-63,1%
21 Turkey	2.212.065	99.693	29.482	0,5%	2118,9%	62.106	12.008	790	0,1%	417,2%	4.582.498	9.953	536	2,6%	45941,4%
22 Malaysia	2.158.842	2.651.642	3.491.743	0,5%	-18,6%	166.849	181.219	285.434	0,3%	-7,9%	132.179	150.516	219.353	0,1%	-12,2%
23 Portugal	2.132.499	1.910.667	2.467.619	0,5%	11,6%	207.235	155.545	287.743	0,3%	33,2%	542.928	351.239	454.094	0,3%	54,6%
24 France	1.945.251	2.409.742	433.006	0,4%	-19,3%	85.986	93.472	20.611	0,1%	-8,0%	124.559	150.419	32.798	0,1%	-17,2%
25 South Africa	1.901.698	1.490.975	1.851.985	0,4%	27,5%	197.382	180.700	233.643	0,3%	9,2%	318.697	178.509	466.625	0,2%	78,5%
26 Switzerland	1.863.368	1.366.964	1.673.444	0,4%	36,3%	396.780	434.088	534.457	0,6%	-8,6%	1.550.083	1.652.774	1.475.410	0,9%	-6,2%
27 Canada	1.682.285	1.999.986	2.040.876	0,4%	-15,9%	100.654	119.159	137.209	0,2%	-15,5%	93.208	109.955	121.731	0,1%	-15,2%
28 Chile	1.558.524	3.331.779	1.993.085	0,3%	-53,2%	196.413	365.601	248.221	0,3%	-46,3%	233.876	460.397	279.977	0,1%	-49,2%
29 Macau	1.445.105	1.687.371	2.342.584	0,3%	-14,4%	270.795	223.093	314.299	0,4%	21,4%	1.253.304	1.101.599	1.537.659	0,7%	13,8%
30 Cambodia	1.381.227	860.423	799.044	0,3%	60,5%	122.336	37.535	138.345	0,2%	225,9%	742.934	39.287	338.601	0,4%	1791,0%
Others (2023: +41 countries)	13.527.156	12.439.627	10.175.264	2,9%	8,7%	1.001.048	989.311	1.028.729	1,5%	1,2%	5.389.005	2.596.049	3.281.249	3,1%	107,6%
<b>Total</b>	<b>466.272.455</b>	<b>551.493.892</b>	<b>560.529.780</b>		<b>-15,5%</b>	<b>64.992.899</b>	<b>60.180.728</b>	<b>77.108.898</b>		<b>8,0%</b>	<b>174.394.517</b>	<b>140.901.940</b>	<b>180.567.948</b>		<b>23,8%</b>

Source: MDIC/SECEX - Prepared by: CIBC

## ■ ANALYSIS OF DESTINATIONS

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

- China (without HK) has a share in value of 28.4% (before 29.9%) and 38.2% (40.3%) in area, with a monetary reduction of 0.8% (-0.1%), but an increase of 25.5% (+26.1%) in area.
- United States with a share of 16.7% (16.5%) in value, and with 9.1% (8.9%) in area, shows decreases of 24.1% (-23.4%) in value and 9.5% (-8.2%) in area.
- Italy maintained a share of 12.7% (12.7%) in value but fell to 15.9% (16.0%) in share by area, with a decrease of 37.0% (-35.2%) in value and 6.2% (-2.8%) in area.

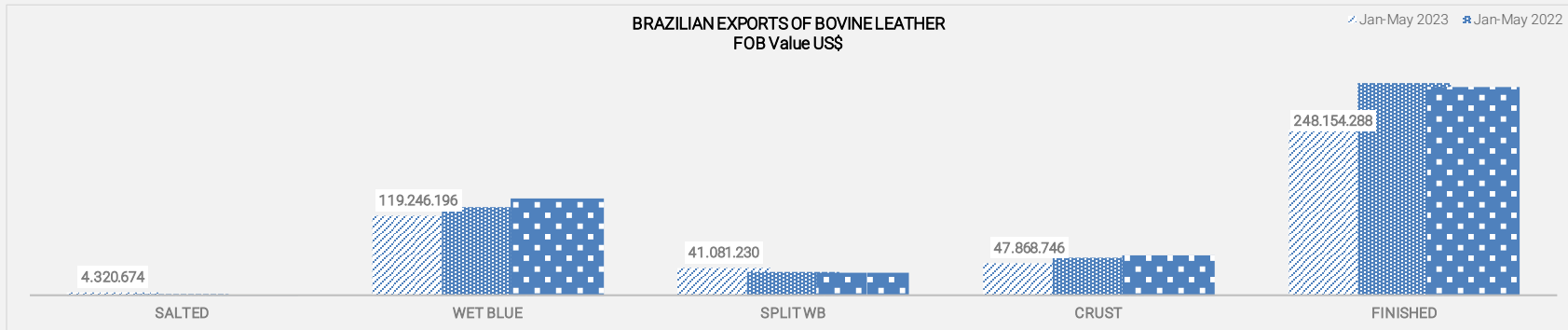
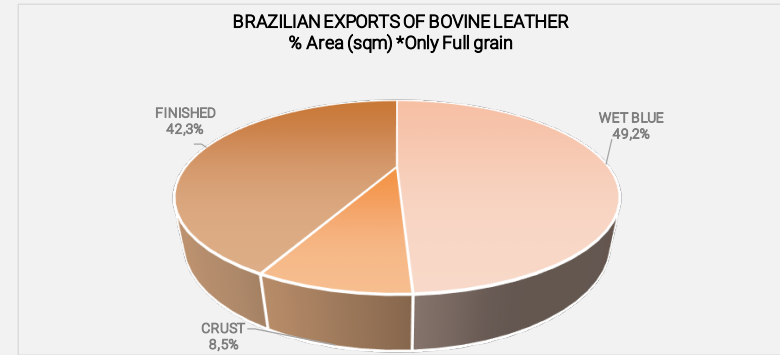
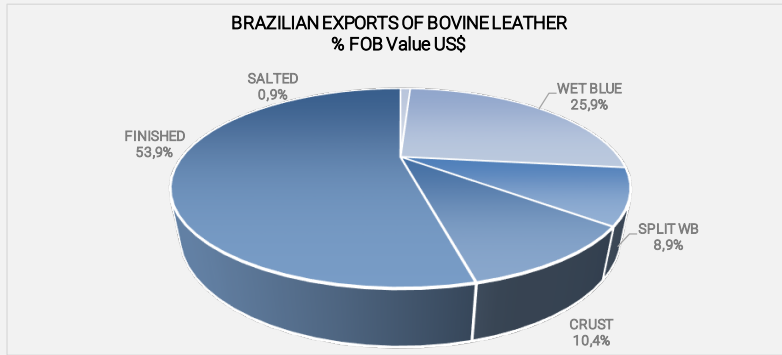
The indexes of the three main destinations had slight worsening in relation to the situation presented in the accumulated until April. Observing the cumulative results considering the same period of last year, the month of May compounded the falls in values and volumes.

Among the TOP10, the most significant increases in values and volumes continue to be seen in shipments to South Korea (+78.6% and +76.0%, respectively) and Mexico (23.8% and 91.8%).

### 3 BRAZILIAN EXPORTS OF BOVINE LEATHER BY TYPE

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-May 2023	Jan-May 2022	Jan-May 2021	2023/2022	2023/2021	Jan-May 2023	Jan-May 2022	Jan-May 2021	2023/2022	2023/2021	Jan-May 2023	Jan-May 2022	Jan-May 2021	2023/2022	2023/2021
SALTED	4.320.674	1.471.047	1.216.067	193,7%	255,3%	-	-	-	-	-	9.554.219	2.196.234	3.245.586	335,0%	194,4%
WET BLUE	119.246.196	132.890.430	145.759.291	-10,3%	-18,2%	24.088.391	16.967.969	20.537.115	42,0%	17,3%	96.580.428	69.792.700	85.763.710	38,4%	12,6%
SPLIT WB	41.081.230	34.808.734	34.389.036	18,0%	19,5%	15.831.552	16.115.199	21.335.872	-1,8%	-25,8%	45.340.014	44.386.934	60.020.444	2,1%	-24,5%
CRUST	47.868.746	56.559.593	60.254.091	-15,4%	-20,6%	4.176.575	4.140.586	5.697.959	0,9%	-26,7%	4.247.362	4.193.442	5.379.214	1,3%	-21,0%
FINISHED	248.154.288	318.570.089	313.293.154	-22,1%	-20,8%	20.724.218	22.775.435	29.321.138	-9,0%	-29,3%	18.213.593	19.870.113	25.715.655	-8,3%	-29,2%
<b>Total</b>	<b>460.671.134</b>	<b>544.299.893</b>	<b>554.911.639</b>	<b>-15,4%</b>	<b>-17,0%</b>	<b>64.820.736</b>	<b>59.999.189</b>	<b>76.892.084</b>	<b>8,0%</b>	<b>-15,7%</b>	<b>173.935.616</b>	<b>140.439.423</b>	<b>180.124.609</b>	<b>23,9%</b>	<b>-3,4%</b>

Source: MDIC/SECEX - Prepared by: CIOB



## ■ ANALYSIS OF EXPORTS BY TYPE OF LEATHER

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

- Wet Blue with a reduction in value of 10.3% (-11.6%), but an increase of 42.0% (+42.5%) in area.
- WB Split with an increase of 18.0% (+14.7%) in value, but a decrease of 1.8% (-4.5%) in area.
- Crust with a drop of 15.4% (-18.8%) in value, and an increase of 0.9% (-6.4%) in area.
- Finished leather declining 22.1% (-20.4%) in value and 9.0% (-7.0%) in area.

With the highest monthly volume shipped this year, Crust leather became positive in area in the accumulated five months. Wet Blue leather continues to show significant monthly growth compared to the equivalent month of 2022, but lower prices still lead to cumulative declines in the year.

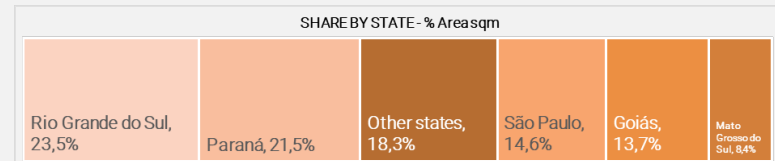
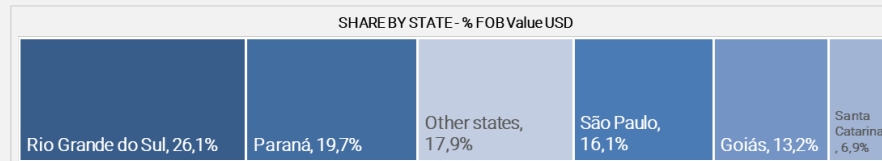
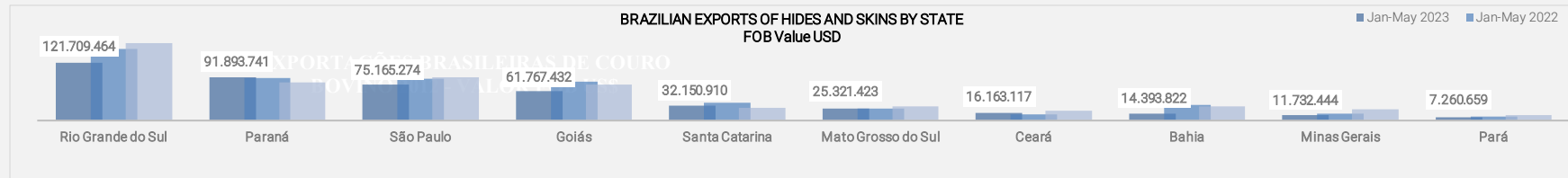
In May, salted bovine hides had the highest value shipped since February 2014, with a value more than double the value of April. Volumes more than tripled compared to the same month in 2022.



# EXPORTS OF HIDES AND SKINS BY STATE

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-May 2023	Jan-May 2022	Jan-May 2021	2023	2023/2022		Jan-May 2023	Jan-May 2022	Jan-May 2021	2023	2023/2022		Jan-May 2023	Jan-May 2022	Jan-May 2021	2023	2023/2022	
1 Rio Grande do Sul	121.709.464	150.258.271	163.198.350	26,1%	-19,0%	15.246.965	15.974.809	21.833.720	23,5%	-4,6%	34.528.054	30.447.358	40.545.406	19,8%	13,4%			
2 Paraná	91.893.741	89.012.277	80.219.731	19,7%	3,2%	13.978.739	10.881.283	11.782.892	21,5%	28,5%	38.902.494	27.297.940	30.736.973	22,3%	42,5%			
3 São Paulo	75.165.274	87.332.061	90.782.595	16,1%	-13,9%	9.462.622	8.376.994	11.690.622	14,6%	13,0%	20.228.178	14.903.571	23.470.530	11,6%	35,7%			
4 Goiás	61.767.432	82.668.925	75.332.489	13,2%	-25,3%	8.913.171	9.464.921	10.161.388	13,7%	-5,8%	27.380.349	26.561.662	28.061.993	15,7%	3,1%			
5 Santa Catarina	32.150.910	38.090.400	26.344.119	6,9%	-15,6%	3.719.486	3.850.426	3.923.910	5,7%	-3,4%	7.525.625	10.323.670	10.281.375	4,3%	-27,1%			
6 Mato Grosso do Sul	25.321.423	25.891.371	29.381.267	5,4%	-2,2%	5.483.824	3.534.713	4.543.380	8,4%	55,1%	19.858.734	12.680.911	16.446.791	11,4%	56,6%			
7 Ceará	16.163.117	12.482.724	21.088.266	3,5%	29,5%	1.432.703	863.109	2.074.862	2,2%	66,0%	2.056.079	1.165.576	2.658.370	1,2%	76,4%			
8 Bahia	14.393.822	33.067.698	30.463.027	3,1%	-56,5%	2.146.908	3.521.354	4.439.387	3,3%	-39,0%	3.967.073	5.612.260	8.932.724	2,3%	-29,3%			
9 Minas Gerais	11.732.444	14.646.381	23.886.355	2,5%	-19,9%	2.211.410	1.872.599	4.249.159	3,4%	18,1%	4.787.778	2.901.432	7.180.649	2,7%	65,0%			
10 Pará	7.260.659	8.080.503	11.681.566	1,6%	-10,1%	1.466.434	1.046.993	1.533.495	2,3%	40,1%	7.227.964	5.021.160	7.182.930	4,1%	44,0%			
11 Mato Grosso	2.498.941	4.205.575	3.424.266	0,5%	-40,6%	534.751	530.783	530.532	0,8%	0,7%	1.824.870	2.130.798	2.090.413	1,0%	-14,4%			
12 Rio de Janeiro	2.207.028	2.181.402	1.256.026	0,5%	1,2%	67.216	45.663	17.076	0,1%	47,2%	193.955	30.258	29.603	0,1%	541,0%			
13 Pernambuco	1.099.736	458.031	464.147	0,2%	140,1%	27.131	17.487	18.030	0,04%	55,1%	2.231.862	215.592	1.222.261	1,3%	935,2%			
14 Rio Grande do Norte	1.035.960	289.371	95.398	0,2%	258,0%	0	0	0	0,0%	-	2.446.130	529.500	115.560	1,4%	362,0%			
15 Piauí	644.551	1.419.703	1.245.644	0,1%	-54,6%	33.245	81.060	113.740	0,1%	-59,0%	19.912	45.005	66.231	0,01%	-55,8%			
16 Tocantins	499.840	0	84.532	0,1%	-	119.360	0	8.902	0,2%	-	572.520	0	45.550	0,3%	-			
17 Distrito Federal	324.468	159.228	910.740	0,1%	103,8%	67.665	25.363	123.604	0,1%	166,8%	357.065	127.690	582.642	0,2%	179,6%			
18 Maranhão	273.655	76.418	0	0,1%	258,1%	60.060	10.981	0	0,1%	446,9%	133.130	9.453	0	0,1%	1308,3%			
19 Rondônia	81.610	0	0	0,02%	-	21.104	0	0	0,03%	-	74.680	0	0	0,04%	-			
20 Paraíba	37.830	0	0	0,01%	-	0	0	0	0,0%	-	78.000	0	0	0,04%	-			
21 Espírito Santo	10.550	12.544	6.200	0,002%	-15,9%	105	113	59	0,000%	-7,1%	65	62	24	0,000%	4,8%			
22 Amapá	0	412.492	200.588	0,0%	-100,0%	0	0	0	0,0%	-	0	479.013	413.840	0,0%	-100,0%			
21 Amazonas	0	747.152	464.474	0,0%	-100,0%	0	82.011	64.140	0,0%	-100,0%	0	418.995	504.083	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%			
<b>Total</b>	<b>466.272.455</b>	<b>551.493.892</b>	<b>560.529.780</b>	<b>100,0%</b>	<b>-15,5%</b>	<b>64.992.899</b>	<b>60.180.728</b>	<b>77.108.898</b>	<b>100,0%</b>	<b>8,0%</b>	<b>174.394.517</b>	<b>140.901.940</b>	<b>180.567.948</b>	<b>100,0%</b>	<b>23,8%</b>			

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 five months of the year, the following highlights:

- Considering the TOP10 exporters, we have growth in value in Ceará (+29.5%) and Paraná (+3.2%). The biggest falls are in the states of Bahia (-56.5%), Goiás (-25.3%) and Minas Gerais (-19.9%).
- Regarding the traded area, we now have four states with negative indexes in area, being: Bahia (-39.0%), Goiás (-5.8%), Rio Grande do Sul (-4.6%) and Santa Catarina (-3.4%). The biggest growth is in Ceará, with +66.0%.
- The ranking of value and volume did not change this month, with Rio Grande do Sul maintaining the leadership in value (share of 26.1%) and area (23.5%), and Paraná leading in weight (22.3 %).

## ■ CLOSING REMARKS

In general, shipments abroad in the month of May were very similar to what happened in the previous month. While there were reductions in values, volumes were positive, both in area and weight, always compared to the same month of 2022. Analyzing the performance of the last three months of this year, there are consecutive reductions in values and volumes.

Even if still incipient, we can already notice a worsening in the indexes of shipments to China, which until April showed improvements every month. Also, among the other two main markets, the United States and Italy, there were setbacks considering the accumulated result up to the previous month.

The weak demand for leather in the global market has been sustained, causing a negative impact on Brazilian exports in the sector. May data on China's economy confirm that the recovery is slower than projected at the beginning of the year. The reading of the main international sources on the Chinese economy in the month of May confirms what the April data had already signaled: the strength of the country's recovery after Covid-19, which exceeded expectations at the beginning of the year, has lost significant momentum during this year's second trimester. In Europe, the vast majority of tanneries continue to operate below normal due to lack of demand. –