

MARCH 2024

Brazilian exports of Hides and Skins



Brazilian leather



apexBrasil

MINISTÉRIO DO
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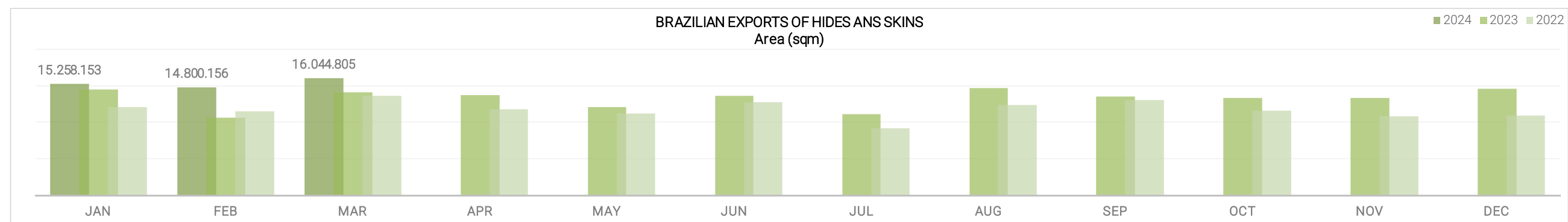
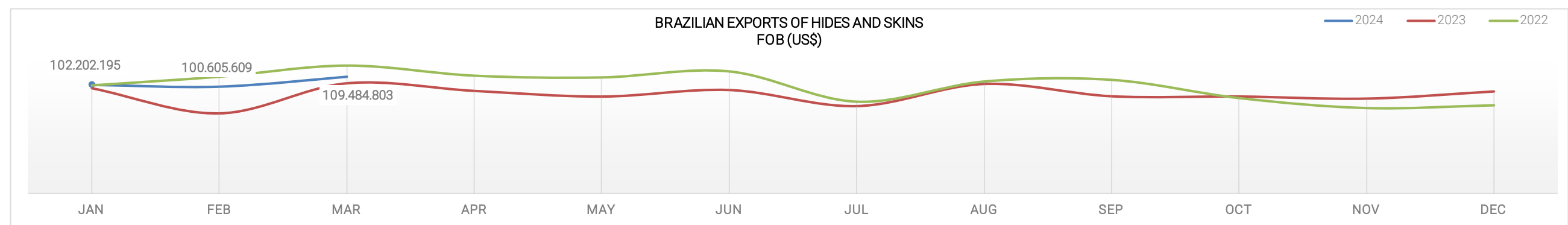
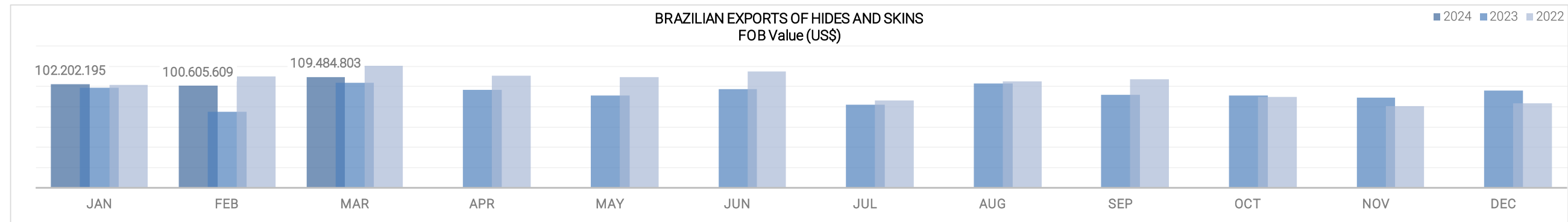
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MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022
JAN	102.202.195	99.097.256	101.697.054	6,4%	3,1%	0,5%	15.258.153	14.458.015	12.063.997	5,0%	5,5%	26,5%	42.748.918	40.842.514	30.527.897	2,9%	4,7%	40,0%
FEB	100.605.609	75.269.723	109.794.363	-1,6%	33,7%	-8,4%	14.800.156	10.666.731	11.518.363	-3,0%	38,8%	28,5%	46.839.946	29.776.931	25.501.700	9,6%	57,3%	83,7%
MAR	109.484.803	103.785.252	120.139.328	8,8%	5,5%	-8,9%	16.044.805	14.083.877	13.625.210	8,4%	13,9%	17,8%	48.629.159	36.974.204	31.859.528	3,8%	31,5%	52,6%
APR		96.588.085	110.738.209					13.705.693	11.773.200					35.449.787	28.030.076			
MAY		91.214.382	109.124.938					12.063.660	11.199.958					31.339.687	24.982.739			
JUN		97.427.722	114.733.220					13.607.331	12.737.959					34.008.351	32.538.087			
JUL		82.168.631	86.582.958					11.107.588	9.168.223					29.554.021	21.825.224			
AUG		103.150.225	105.318.890					14.634.581	12.398.155					40.916.844	32.250.962			
SEP		91.485.697	106.870.559					13.493.620	12.998.266					36.476.373	35.798.746			
OCT		91.260.275	89.944.558					13.310.650	11.595.103					36.910.273	30.269.139			
NOV		89.258.600	80.665.640					13.305.461	10.767.130					36.828.021	30.454.895			
DEC		96.045.932	83.228.588					14.526.060	10.904.167					41.534.604	30.498.876			
Total	312.292.607	1.116.751.780	1.218.838.305		12,3%	-5,8%	46.103.114	158.963.267	140.749.731		17,6%	23,9%	138.218.023	430.611.610	354.537.869		28,5%	57,3%

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 March 2024, registered a value of US\$ 109.5 million, representing increases of 8.8% over the previous month, and 5.5% over the same month last year, when US\$103.8 million were exported.

Considering volume, 16.0 million square meters and 48.6 thousand tons were exported, which meant, respectively, increases of 13.9% and 31.5% over the same month in 2023. Compared to February, there was also increases of 8.4% in area and 3.8% in weight.

The first quarter of the year totaled US\$ 312.3 million, 12.3% above the same period in 2023, with increases also of 17.6% in area and 28.5% in weight.

COUNTRIES	FOB VALUE (US\$)			Share	Δ	AREA (sqm)			Share	Δ	WEIGHT (KG)		
	Jan-Mar 2024	Jan-Mar 2023	Jan-Mar 2022	2024	2024/2023	Jan-Mar 2024	Jan-Mar 2023	Jan-Mar 2022	2024	2024/2023	Jan-Mar 2024	Jan-Mar 2023	Jan-Mar 2022
1 China + Hong Kong	99.162.916	88.085.069	102.649.697	31,8%	12,6%	19.503.359	16.952.979	15.417.323	42,3%	15,0%	62.680.196	53.406.897	41.258.312
China	91.951.529	81.524.340	83.691.355	29,4%	12,8%	18.142.643	15.494.320	13.115.723	39,4%	17,1%	58.770.704	49.485.748	35.204.120
2 United States	46.477.367	48.675.251	61.511.938	14,9%	-4,5%	3.513.914	3.733.407	3.919.386	7,6%	-5,9%	3.030.923	3.311.042	3.361.363
3 Italy	36.672.451	38.007.087	53.351.770	11,7%	-3,5%	6.376.649	6.795.482	6.337.704	13,8%	-6,2%	20.955.291	23.553.127	21.150.266
4 Vietnam	31.301.512	12.633.600	17.715.219	10,0%	147,8%	6.072.812	2.557.181	2.780.533	13,2%	137,5%	15.249.828	6.166.134	6.769.359
5 Mexico	19.681.943	12.312.223	12.117.626	6,3%	59,9%	2.034.628	1.102.666	796.858	4,4%	84,5%	3.224.202	1.427.489	830.789
6 Germany	10.583.270	8.438.766	14.032.815	3,4%	25,4%	875.691	613.747	942.601	1,9%	42,7%	727.963	538.520	786.905
7 Thailand	9.727.030	11.695.502	11.085.053	3,1%	-16,8%	1.090.023	1.219.850	776.253	2,4%	-10,6%	2.488.674	2.238.074	1.048.456
Hong Kong	7.211.387	6.560.729	18.958.342	2,3%	9,9%	1.360.716	1.458.659	2.301.600	3,0%	-6,7%	3.909.492	3.921.149	6.054.192
8 Hungary	5.718.283	4.405.153	6.584.823	1,8%	29,8%	479.951	351.749	445.652	1,0%	36,4%	402.115	306.626	411.549
9 South Korea	4.588.759	10.922.994	7.217.736	1,5%	-58,0%	465.798	1.055.900	682.769	1,0%	-55,9%	604.360	1.250.815	1.385.928
10 Switzerland	3.655.400	679.983	980.113	1,2%	437,6%	788.838	157.422	335.321	1,7%	401,1%	1.877.097	681.770	1.286.340
11 Uruguay	3.639.064	2.628.720	1.566.797	1,2%	38,4%	463.145	312.720	231.705	1,0%	48,1%	1.695.023	1.059.577	900.893
12 Slovakia	3.471.197	2.284.992	454.598	1,1%	51,9%	224.520	140.227	21.659	0,5%	60,1%	214.672	141.862	34.602
13 Norway	2.848.791	1.844.782	1.199.972	0,9%	54,4%	196.975	123.075	63.263	0,4%	60,0%	139.014	88.094	45.859
14 Taiwan	2.813.489	4.047.903	5.477.381	0,9%	-30,5%	538.893	934.072	1.234.432	1,2%	-42,3%	1.445.248	2.839.129	2.945.428
15 Tunisia	2.644.908	2.380.137	2.265.840	0,8%	11,1%	173.884	157.834	149.691	0,4%	10,2%	250.767	232.114	229.691
16 Spain	2.443.097	2.101.305	1.298.690	0,8%	16,3%	639.867	618.237	459.625	1,4%	3,5%	1.570.112	1.751.450	1.254.537
17 Indonesia	2.204.758	1.961.096	4.259.415	0,7%	12,4%	329.995	240.281	336.082	0,7%	37,3%	375.597	182.280	258.447
18 India	2.047.440	1.419.598	3.070.297	0,7%	44,2%	595.948	294.993	269.141	1,3%	102,0%	1.610.414	842.277	965.502
19 Turkey	1.988.639	1.267.157	87.116	0,6%	56,9%	9.992	48.777	11.778	0,02%	-79,5%	6.736.565	2.623.910	9.904
20 Portugal	1.787.328	1.212.404	1.183.774	0,6%	47,4%	142.741	110.586	108.531	0,3%	29,1%	212.151	305.207	270.837
21 Combodia	1.764.019	539.132	561.184	0,6%	227,2%	34.652	23.866	26.467	0,1%	45,2%	3.360.354	142.802	27.260
22 Poland	1.431.997	1.835.912	2.967.679	0,5%	-22,0%	130.918	168.164	255.530	0,3%	-22,1%	111.969	135.420	210.894
23 Netherlands	1.418.093	2.238.855	3.476.628	0,5%	-36,7%	157.751	232.186	275.520	0,3%	-32,1%	149.522	223.449	247.883
24 Bangladesh	1.228.243	473.877	0	0,4%	159,2%	87.788	39.242	0	0,2%	123,7%	116.451	75.038	0
25 Canada	1.125.607	1.068.546	779.746	0,4%	5,3%	72.110	66.806	46.469	0,2%	7,9%	107.060	57.079	43.334
26 Malaysia	1.077.395	1.323.923	1.606.530	0,3%	-18,6%	105.213	100.966	113.831	0,2%	4,2%	91.443	81.746	95.462
27 Nigeria	1.068.055	455.853	131.766	0,3%	134,3%	0	0	7.699	0,0%	-	3.562.170	1.500.750	285.097
28 Argentina	946.813	3.260.046	2.780.236	0,3%	-71,0%	46.463	198.233	217.634	0,1%	-76,6%	58.219	245.684	190.612
29 Colombia	807.303	128.774	277.897	0,3%	526,9%	150.786	6.036	29.531	0,3%	2398,1%	436.552	27.443	101.177
30 France	746.372	1.286.852	1.232.662	0,2%	-42,0%	33.118	58.936	47.576	0,1%	-43,8%	48.439	83.154	76.790
Others (2024: +26.countries)	7.221.068	8.536.739	9.705.747	2,3%	-15,4%	766.692	793.003	867.006	1,7%	-3,3%	4.685.632	2.074.690	1.405.649
Total	312.292.607	278.152.231	331.630.745		12,3%	46.103.114	39.208.623	37.207.570		17,6%	138.218.023	107.593.649	87.889.125

Source: MDIC/SECEX - Prepared by: CICB

■ ANALYSIS OF DESTINATIONS

The three main destinations for Brazilian leather show the following information in the first quarter of the year:

- China (without HK) has a share in value of 29.4% (29.1% in the previous month) and 39.4% (39.3%) in area, maintaining the increase of 12.8% (12.8%) in value and now with 17.1% (+18.6%) in área.
- United States with a share of 14.9% (15.3%) in value and 7.6% (7.7%) in area, falling 4.5% (+9.6%) in value and 5.9% (+8.5%) in área.
- Italy with a share of 11.7% (11.2%) in value, and 13.8% (13.2%) in area, with drops of 3.5% (-12.2%) in value and 6.2% (-15.8%) in área.

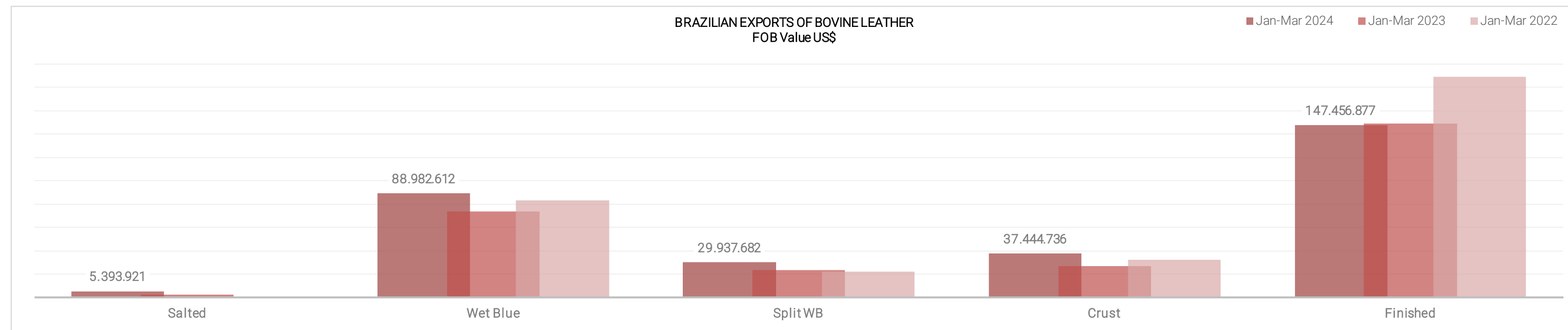
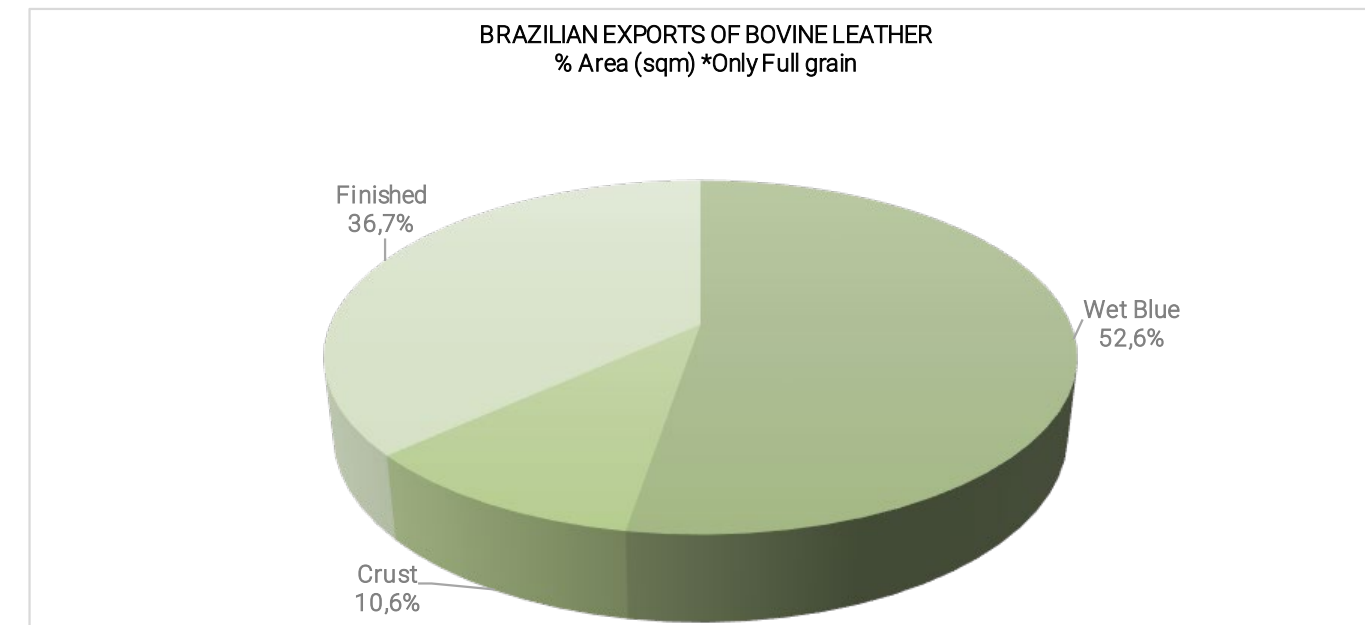
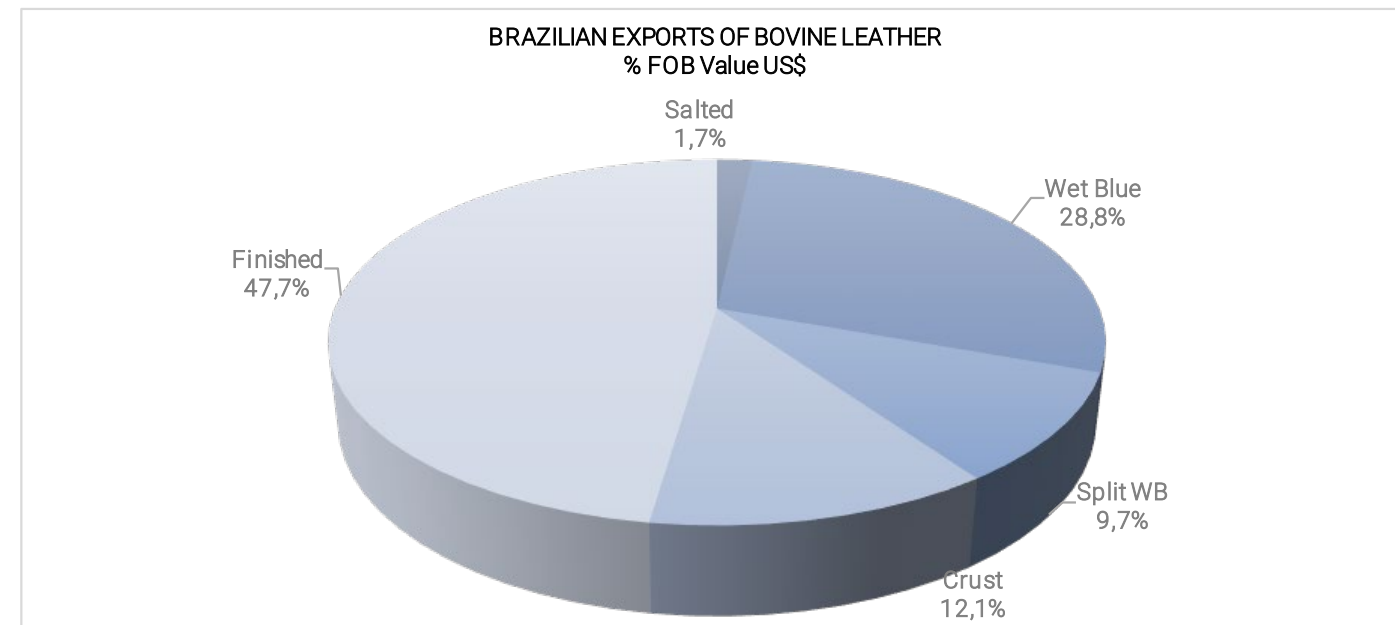
While China maintains its indexes for purchases of Brazilian leather practically stable, Italy shows a reaction in March shipments, despite still retaining negative values and volumes indexes.

The United States now sees a drop in imports from Brazil.

Among the TOP10, Switzerland maintains the highest growth, with +437.6% in value and +401.1% in area, followed by Vietnam (+147.8% in value and +137.5% in area).

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Mar 2024	Jan-Mar 2023	Jan-Mar 2022	2024/2023	2024/2022	Jan-Mar 2024	Jan-Mar 2023	Jan-Mar 2022	2024/2023	2024/2022	Jan-Mar 2024	Jan-Mar 2023	Jan-Mar 2022	2024/2023	2024/2022
Salted	5.393.921	2.389.729	696.918	125,7%	674,0%	-	-	-	-	-	17.234.348	5.370.817	1.073.930	220,9%	1504,8%
Wet Blue	88.982.612	73.447.524	82.894.526	21,2%	7,3%	18.460.471	15.579.239	10.612.017	18,5%	74,0%	75.300.125	62.863.384	43.034.081	19,8%	75,0%
Split WB	29.937.682	23.436.686	22.403.140	27,7%	33,6%	10.862.101	9.014.824	10.610.382	20,5%	2,4%	30.463.864	26.042.318	29.340.833	17,0%	3,8%
Crust	37.444.736	26.825.446	32.525.204	39,6%	15,1%	3.733.497	2.263.456	2.389.077	64,9%	56,3%	3.536.416	2.333.722	2.364.112	51,5%	49,6%
Finished	147.456.877	148.584.685	189.147.248	-0,8%	-22,0%	12.876.098	12.262.251	13.503.938	5,0%	-4,6%	11.226.831	10.729.311	11.774.540	4,6%	-4,7%
Total	309.215.828	274.684.070	327.667.036	12,6%	-5,6%	45.932.167	39.119.770	37.115.414	17,4%	23,8%	137.761.584	107.339.552	87.587.496	28,3%	57,3%

Source: MDIC/SECEX - Prepared by: CICB



■ ANALYSIS OF TYPES OF LEATHER

The following variations were registered in Brazilian exports of bovine leather by type, in the first quarter, compared to the same period of the previous year:

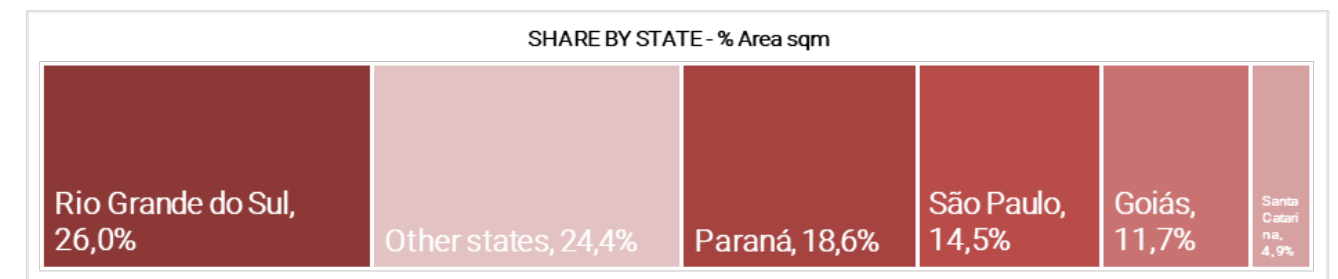
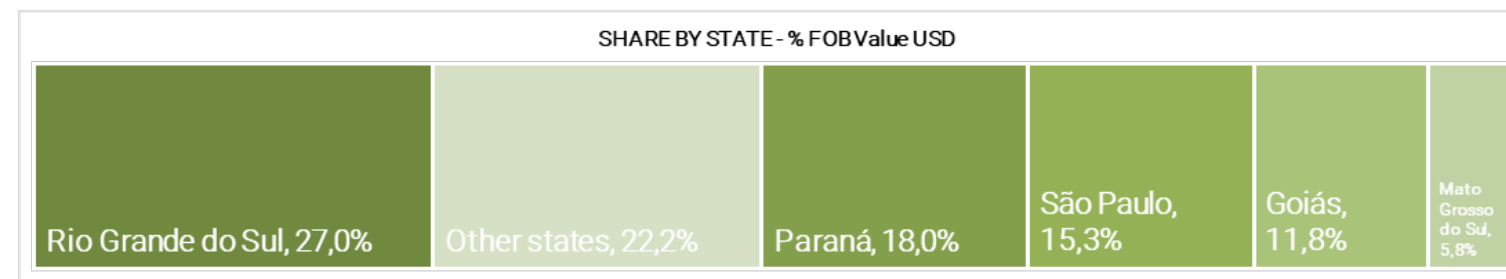
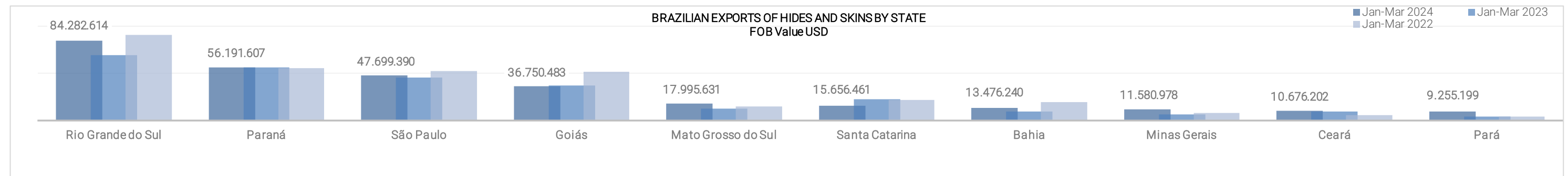
- Wet blue shows a share of 28.8% (27.9%) in value and 52.6% (52.0%) in area, with increases of 21.2% (+16.9%) in value, and 18.5% (+13.1%) in area.
- Split WB with a share of 9.7% (9.8%) in value, with a monetary increase of 27.7% (+33.6%) and 20.5% (+24.8%) in area.
- Crust with a share of 12.1% (11.5%) in value and 10.6% (10.0%) in area, with an increase of 39.6% (+52.2%) and 64, 9% (+80.9%), respectively.

- Finished with 47.7% (49.0%) share in value and 36.7% (38.0%) in area, now with a drop of 0.8% (+5.8%) in value, but increase of 5.0% (+13.6%) in area.

Finished leather began to show a slight drop in value, after reaching positive rates in February. The other types of leather maintain positive indexes, with Crust still showing the highest growth among them.

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-Mar 2024	Jan-Mar 2023	Jan-Mar 2022	2024	2024/2023		Jan-Mar 2024	Jan-Mar 2023	Jan-Mar 2022	2024	2024/2023		Jan-Mar 2024	Jan-Mar 2023	Jan-Mar 2022	2024	2024/2023	
1 Rio Grande do Sul	84.282.614	69.480.995	91.014.003	27,0%	21,3%	11.969.037	8.739.875	9.995.870	26,0%	36,9%	27.829.531	20.703.461	19.930.593	20,1%	34,4%			
2 Paraná	56.191.607	56.249.343	55.671.350	18,0%	-0,1%	8.561.778	8.799.256	6.775.663	18,6%	-2,7%	26.296.497	25.859.845	17.257.182	19,0%	1,7%			
3 São Paulo	47.699.390	45.666.489	52.494.061	15,3%	4,5%	6.699.663	5.939.571	5.327.634	14,5%	12,8%	19.667.345	13.131.886	9.319.238	14,2%	49,8%			
4 Goiás	36.750.483	37.467.456	51.589.012	11,8%	-1,9%	5.390.914	5.446.790	6.097.797	11,7%	-1,0%	16.567.934	17.363.131	17.867.300	12,0%	-4,6%			
5 Mato Grosso do Sul	17.995.631	12.468.205	15.128.552	5,8%	44,3%	3.442.579	2.955.297	2.176.630	7,5%	16,5%	10.997.214	10.456.488	7.494.817	8,0%	5,2%			
6 Santa Catarina	15.656.461	22.291.069	21.552.109	5,0%	-29,8%	2.238.741	2.425.085	2.191.841	4,9%	-7,7%	5.923.901	4.766.459	5.123.805	4,3%	24,3%			
7 Bahia	13.476.240	9.296.249	19.554.287	4,3%	45,0%	1.607.483	1.417.753	2.019.258	3,5%	13,4%	4.058.687	2.582.397	3.412.736	2,9%	57,2%			
8 Minas Gerais	11.580.978	6.619.393	8.147.047	3,7%	75,0%	2.183.305	1.239.961	1.002.314	4,7%	76,1%	5.296.410	2.993.280	1.470.769	3,8%	76,9%			
9 Ceará	10.676.202	9.277.968	5.859.481	3,4%	15,1%	961.851	825.010	481.463	2,1%	16,6%	1.326.697	1.244.463	764.919	1,0%	6,6%			
10 Pará	9.255.199	3.894.869	4.039.885	3,0%	137,6%	1.921.680	826.500	532.672	4,2%	132,5%	9.925.809	4.018.946	2.437.251	7,2%	147,0%			
11 Mato Grosso	3.471.766	1.578.409	3.286.190	1,1%	120,0%	646.912	345.706	420.284	1,4%	87,1%	2.585.710	1.191.194	1.705.692	1,9%	117,1%			
12 Amazonas	1.223.259	0	687.552	0,4%	-	239.838	0	81.507	0,5%	-	1.240.230	0	418.552	0,9%	-			
13 Rio Grande do Norte	989.624	594.472	40.239	0,3%	66,5%	0	0	0	0,0%	-	3.491.990	1.417.400	81.500	2,5%	146,4%			
14 Rio de Janeiro	852.435	1.477.910	1.349.633	0,3%	-42,3%	9.709	18.150	35.543	0,02%	-46,5%	82.539	8.099	26.104	0,1%	919,1%			
15 Pernambuco	744.334	558.281	228.911	0,2%	33,3%	44.884	18.691	12.226	0,1%	140,1%	2.151.383	973.521	197.341	1,6%	121,0%			
16 Piauí	683.996	418.925	655.001	0,2%	63,3%	36.160	21.301	39.202	0,1%	69,8%	20.423	12.927	20.084	0,01%	58,0%			
17 Rondônia	432.371	0	0	0,1%	-	118.040	0	0	0,3%	-	432.219	0	0	0,3%	-			
18 Maranhão	294.158	89.742	0	0,1%	227,8%	22.164	26.696	0	0,05%	-17,0%	282.744	61.097	0	0,2%	362,8%			
19 Distrito Federal	35.859	277.691	98.473	0,01%	-87,1%	8.376	56.881	17.600	0,02%	-85,3%	40.760	299.155	85.570	0,03%	-86,4%			
20 Amapá	0	0	227.564	0,0%	-	0	0	0	0,0%	-	0	0	275.638	0,0%	-			
21 Espírito Santo	0	0	6.230	0,0%	-	0	0	50	0,0%	-	0	0	22	0,0%	-			
22 Not declared *	0	0	1.165	0,0%	-	0	0	16	0,0%	-	0	0	12	0,0%	-			
23 Tocantins	0	444.765	0	0,0%	-100,0%	0	106.100	0	0,0%	-100,0%	0	509.900	0	0,0%	-100,0%			
Total	312.292.607	278.152.231	331.630.745	100,0%	12,3%	46.103.114	39.208.623	37.207.570	100,0%	17,6%	138.218.023	107.593.649	87.889.125	100,0%	28,5%			

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 from January to March presented the following highlights:

- Among the ten largest exporters, we now have two more states with drops in exports, in addition to Santa Catarina (-29.8%): Goiás (-1.9%) and Paraná (-0.1%). The biggest growths were in Pará (+137.6%) and Minas Gerais (+75.0%).
- Considering the traded area, we have reductions in Paraná, Goiás and Santa Catarina. The remaining seven states show growth, with emphasis also on Pará (+132.5%) and Minas Gerais (+76.1%).
- Among the other states, we have important improvements in the value exported by Maranhão (+227.8%) and in the area exported by Pernambuco (+140.1%).
- The ranking remains with the same positions, but Rio Grande do Sul moves further away from the other states in national leadership. Now it has a 27.0% share in value (previously 26.7%) and 26.0% in area (previously 25.2%). Next come Paraná (18.0% in value and 18.6% in area), and São Paulo (15.3% in value and 14.5% in area).

■ CLOSING REMARKS

In March, Brazil's leather sector exported the highest value in 20 months, in addition to the highest volume since December 2015, when more than 51 thousand tons were shipped abroad. There were 48.6 thousand tons in March, an increase of 31.5% over the same month in 2023, in addition to 52.6% above March 2022.

Now the sector accumulates important increases of 12.3% in value in the year, 17.6% in area and 28.5% in weight.

Even with an adverse outlook, the national tanning sector once again shows its resilience, seeking alternatives and gaining market share in non-traditional countries. In addition to China, elective destinations such as Switzerland, Hungary, Vietnam, Mexico, Slovakia and Norway show favorable indexes in the first quarter of the year.

In general, the market presents global uncertainties and tensions due to conflicts and the proximity of elections in several European countries, in addition to Russia and the USA, with a strong impact on leather consumption and manufacturing.

At APLF, there were many more offers than demands, but Brazilian companies indicated good contacts and positive results.