



Brazilian leather

BRAZILIAN EXPORTS OF HIDES AND SKINS

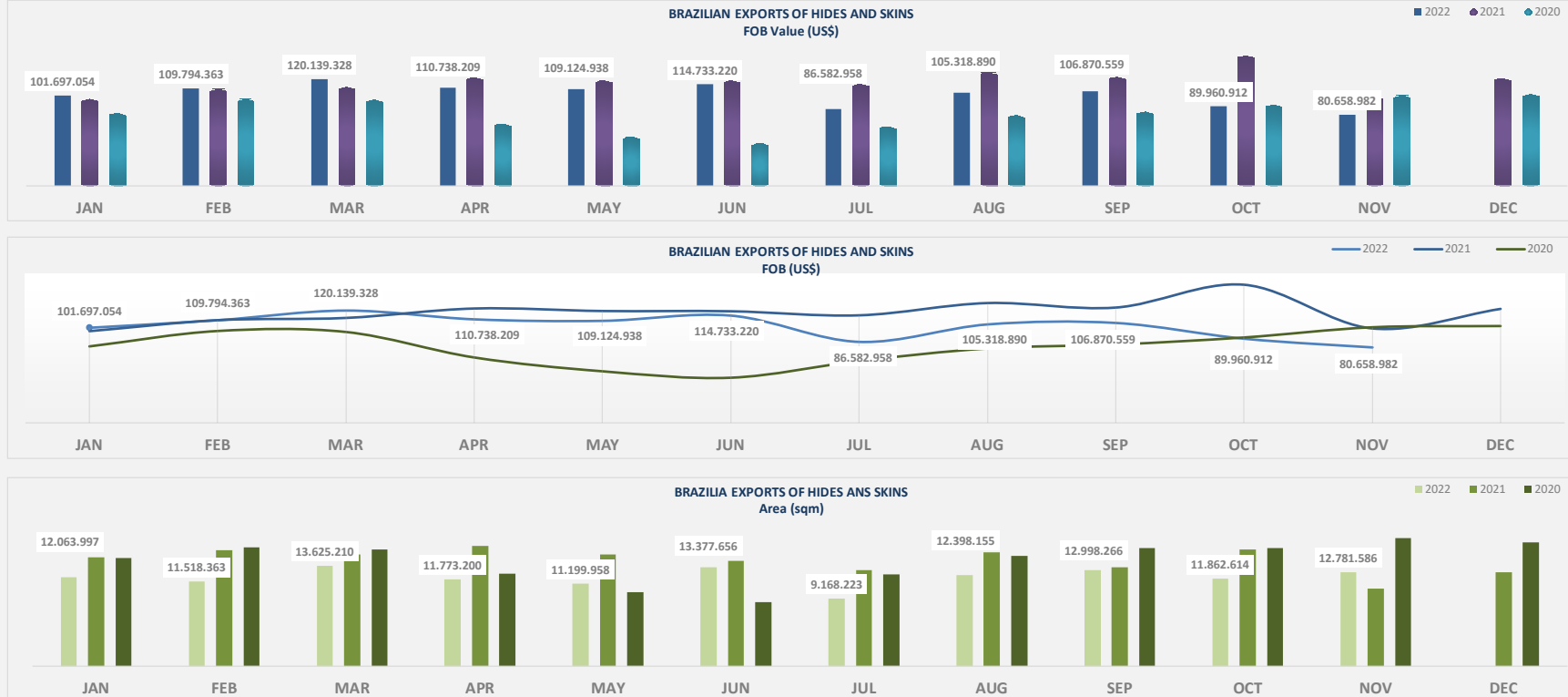
November 2022

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BRAZILIAN EXPORTS OF HIDES AND SKINS

MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2022	2021	2020	MONTH 2022	2022/2021	2022/2020	2022	2021	2020	MONTH 2022	2022/2021	2022/2020	2022	2021	2020	MONTH 2022	2022/2021	2022/2020
JAN	101.697.054	97.842.657	81.668.858	-16,3%	3,9%	24,5%	12.063.997	14.794.446	14.641.337	-5,2%	-18,5%	-17,6%	30.527.897	38.010.157	39.515.855	2,9%	-19,7%	-22,7%
FEB	109.794.363	109.528.720	98.050.502	8,0%	0,2%	12,0%	11.518.363	15.698.373	16.093.955	-4,5%	-26,6%	-28,4%	25.501.700	38.218.258	41.069.707	-16,5%	-33,3%	-37,9%
MAR	120.139.328	111.927.496	96.997.936	9,4%	7,3%	23,9%	13.625.210	15.133.632	15.827.958	18,3%	-10,0%	-13,9%	31.859.528	34.265.446	37.463.401	24,9%	-7,0%	-15,0%
APR	110.738.209	121.951.096	69.882.283	-7,8%	-9,2%	58,5%	11.773.200	16.318.524	12.510.483	-13,6%	-27,9%	-5,9%	28.030.076	36.417.387	30.043.895	-12,0%	-23,0%	-6,7%
MAY	109.124.938	119.279.811	55.183.982	-1,5%	-8,5%	97,7%	11.199.958	15.163.923	10.065.078	-4,9%	-26,1%	11,3%	24.982.739	33.656.700	28.624.906	-10,9%	-25,8%	-12,7%
JUN	114.733.220	119.014.618	48.359.626	5,1%	-3,6%	137,3%	13.377.656	14.251.467	8.673.424	19,4%	-6,1%	54,2%	32.538.087	31.809.207	26.925.237	30,2%	2,3%	20,8%
JUL	86.582.958	114.704.199	66.205.213	-24,5%	-24,5%	30,8%	9.168.223	12.987.305	12.498.957	-31,5%	-29,4%	-26,6%	21.825.224	28.797.843	38.114.991	-32,9%	-24,2%	-42,7%
AUG	105.318.890	127.753.281	79.465.110	21,6%	-17,6%	32,5%	12.398.155	15.456.776	14.965.253	35,2%	-19,8%	-17,2%	32.250.962	31.412.555	42.425.488	47,8%	2,7%	-24,0%
SEP	106.870.559	122.947.850	83.687.412	1,5%	-13,1%	27,7%	12.998.266	13.406.581	15.976.282	4,8%	-3,0%	-18,6%	35.798.746	32.398.066	45.844.633	11,0%	10,5%	-21,9%
OCT	89.960.912	147.230.475	91.164.639	-15,8%	-38,9%	-1,3%	11.862.614	15.861.118	16.061.025	-8,7%	-25,2%	-26,1%	30.269.139	35.079.112	43.793.546	-15,4%	-13,7%	-30,9%
NOV	80.658.982	100.737.179	102.004.642	-10,3%	-19,9%	-20,9%	12.781.586	10.511.289	17.398.496	7,7%	21,6%	-26,5%	30.454.895	25.844.344	47.350.592	0,6%	17,8%	-35,7%
DEC		121.530.065	103.329.787					12.723.535	16.769.768					29.669.508	40.510.343			
Total	1.135.619.413	1.414.447.447	975.999.990		-12,2%	30,1%	132.767.228	172.306.969	171.482.016		-16,8%	-14,2%	324.038.993	395.578.583	461.682.594		-11,4%	-23,1%

Source: SECEX - Prepared by: CICB



■ ANALYSIS OF TOTAL EXPORTS

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Exports of hides and skins presented by the SECEX (Foreign Trade Secretariat) of the Ministry of Economy and analyzed by the CICB, referring to the month of November 2022, registered a value of US\$ 80.7 million, which means reductions of 19.9% compared to the same month last year, when US\$ 100.7 million were exported, and 10.3% over the previous month.

As for the total exported in square meters, in November 12.8 million were shipped, 21.6% above the same month in 2021, and with a 7.7% increase over October, when the total was 11.9 million sqm.

The period from January to November ended with a total of US\$ 1.14 billion, a drop of 12.2% compared to the same period in 2021, and 16.8% below in traded area, with 132.8 million square meters.

BRAZILIAN EXPORTS OF HIDES AND SKINS BY DESTINATION

COUNTRIES	FOB VALUE (US\$)			Share		AREA (sqm)			Share		WEIGHT (KG)			Share	
	Jan-Nov 2022	Jan-Nov 2021	Jan-Nov 2020	2022	2021/2020	Jan-Nov 2022	Jan-Nov 2021	Jan-Nov 2020	2022	2021/2020	Jan-Nov 2022	Jan-Nov 2021	Jan-Nov 2020	2022	2021/2020
1 China + Hong Kong	314.146.345	437.244.826	270.915.182	27,7%	-28,2%	47.497.711	63.683.915	61.180.005	35,8%	-25,4%	133.601.344	168.145.345	181.988.348	41,2%	-20,5%
China	257.847.237	378.508.454	237.351.299	22,7%	-31,9%	13.115.889	14.715.702	14.197.088	30,3%	-29,3%	35.204.283	38.595.028	38.214.641	35,4%	-23,8%
2 United States	209.174.378	179.160.417	153.430.620	18,4%	16,8%	3.919.996	3.927.349	5.310.414	10,4%	0,1%	3.361.770	3.432.059	4.448.706	3,7%	1,9%
3 Italy	193.385.352	196.926.202	141.238.818	17,0%	-1,8%	6.337.704	8.482.030	8.947.349	20,4%	7,7%	21.150.266	29.033.249	33.227.952	26,5%	11,3%
4 Vietnam	59.974.768	94.410.296	51.795.870	5,3%	-36,5%	2.780.533	5.124.734	4.816.847	8,1%	-34,8%	6.769.359	11.378.328	11.537.210	8,2%	-24,5%
Hong Kong	56.299.108	58.736.372	33.563.883	5,0%	-4,1%	2.301.600	1.802.705	2.896.118	5,5%	7,2%	6.054.192	5.130.113	8.828.690	5,8%	7,2%
5 Germany	46.886.953	44.401.472	35.461.673	4,1%	5,6%	942.601	1.213.924	1.265.227	2,4%	-13,8%	786.905	1.094.025	1.121.860	0,8%	-22,9%
6 Thailand	43.246.506	37.674.708	26.636.610	3,8%	14,8%	797.272	637.261	1.029.004	2,4%	-1,9%	831.106	641.361	1.193.962	1,6%	1,8%
7 Mexico	42.135.148	52.347.013	31.149.086	3,7%	-19,5%	776.253	967.709	855.690	2,1%	-11,7%	1.048.456	1.988.628	1.737.379	0,9%	5,4%
8 South Korea	24.880.091	40.738.560	11.127.076	2,2%	-38,9%	682.769	641.745	515.089	1,8%	-32,1%	1.385.928	769.220	1.086.974	1,5%	-3,7%
9 Hungary	22.113.544	24.461.656	19.430.051	1,9%	-9,6%	445.652	739.121	559.183	1,1%	-20,2%	411.549	667.249	492.679	0,4%	-20,8%
10 Taiwan	17.611.281	22.557.135	18.036.473	1,6%	-21,9%	1.234.432	2.110.969	1.551.400	3,3%	-36,6%	2.945.428	5.696.518	4.288.345	3,4%	-37,4%
11 Indonesia	17.104.856	15.778.328	12.280.657	1,5%	8,4%	336.082	443.783	384.076	1,1%	2,8%	258.447	334.917	348.129	0,4%	-9,3%
12 Norway	12.704.393	13.923.495	9.829.393	1,1%	-8,8%	275.520	279.866	286.255	0,6%	-13,0%	247.883	259.335	330.212	0,2%	-16,8%
13 India	11.773.806	10.520.312	13.261.838	1,0%	11,9%	269.141	460.727	1.267.147	1,0%	17,8%	965.502	1.287.214	4.436.515	1,5%	51,1%
14 Argentina	10.676.393	6.924.007	3.556.825	0,9%	54,2%	255.530	142.937	111.756	0,6%	21,1%	210.894	110.290	98.667	0,3%	30,5%
15 Netherlands	9.804.778	12.135.446	9.384.520	0,9%	-19,2%	217.634	142.227	86.791	0,6%	-19,8%	190.612	133.559	74.442	0,2%	-16,1%
16 Poland	8.406.706	7.144.415	4.418.086	0,7%	17,7%	149.691	183.103	148.209	0,6%	13,6%	229.691	286.187	249.737	0,2%	19,0%
17 Tunisia	8.217.380	9.562.032	7.100.795	0,7%	-14,1%	214.148	157.712	85.190	0,4%	-16,6%	289.102	166.913	145.204	0,3%	-15,8%
18 Uruguay	8.191.884	8.740.499	5.679.310	0,7%	-6,3%	113.831	158.496	103.549	1,3%	35,4%	95.462	120.598	86.526	1,3%	-5,6%
19 Malaysia	7.634.550	6.568.055	3.961.686	0,7%	16,2%	231.705	437.990	205.725	0,4%	5,6%	900.893	1.309.905	1.128.584	0,1%	8,3%
20 Chile	5.054.188	4.817.279	1.858.458	0,4%	4,9%	104.756	39.069	75.416	0,4%	-0,9%	104.298	74.833	91.416	0,2%	8,3%
21 Spain	4.950.074	6.182.491	2.402.380	0,4%	-19,9%	459.625	1.068.774	141.914	1,2%	-40,6%	1.254.537	2.895.171	385.225	1,4%	-39,2%
22 Canada	4.371.055	4.643.933	3.823.268	0,4%	-5,9%	47.576	12.276	27.530	0,2%	-14,0%	76.790	19.491	37.300	0,1%	-8,0%
23 France	4.096.239	2.078.409	1.349.701	0,4%	97,1%	63.263	208.223	141.404	0,1%	77,5%	45.859	157.422	108.421	0,1%	78,1%
24 Portugal	4.035.178	5.753.106	4.359.378	0,4%	-29,9%	108.531	168.740	214.547	0,3%	-39,1%	270.837	296.212	473.246	0,2%	-26,6%
25 Dominican Republic	3.896.058	2.050.480	1.490.754	0,3%	90,0%	335.321	255.278	0	0,4%	121,4%	1.286.340	663.070	0	0,4%	120,2%
26 Slovakia	3.199.564	631.668	600.972	0,3%	406,5%	109.722	144.925	192.979	0,1%	287,2%	108.904	282.339	361.559	0,1%	361,3%
27 South Africa	3.106.953	5.508.366	2.279.541	0,3%	-43,6%	87.999	89.896	139.674	0,3%	-40,1%	259.667	290.159	484.243	0,2%	-50,0%
28 Paraguay	2.995.653	1.692.622	1.614.348	0,3%	77,0%	46.469	71.385	84.087	0,3%	26,7%	43.334	60.177	67.100	0,3%	96,9%
29 Australia	2.916.158	3.705.410	1.576.379	0,3%	-21,3%	83.658	44.230	32.522	0,1%	-23,4%	253.230	116.320	81.088	0,05%	-29,4%
30 Switzerland	2.889.151	7.773.883	375	0,3%	-62,8%	43.886	44.065	34.700	0,6%	-49,9%	39.795	38.394	33.912	1,0%	-25,5%
Others (2022: +47 countries)	26.040.030	26.860.861	22.620.080	2,3%	-3,1%	1.950.417	2.350.289	2.654.062	1,5%	-17,0%	10.810.409	8.493.470	15.808.503	3,3%	27,3%
Total	1.135.619.413	1.292.917.382	872.670.203		-12,2%	132.767.228	159.583.434	154.712.248		-16,8%	324.038.993	365.909.075	421.172.251		-11,4%

Source: MDIC/SECEX - Prepared by: CICB

■ ANALYSIS OF DESTINATIONS

In the accumulated result for the year, the three main destinations for Brazilian leather show the following information:

- China (without HK) has a share in value of 22.7% (previous 22.6%) and 30.3% (30.8%) in area, with a monetary drop of 31.9% (-32.8%), and -29.3% (-31.0%) in area.

- United States now with a share of 18.4% (18.6%) in value, and with 10.4% (10.8%) in area, showing increases of 16.8% (+15.3%) in value and 0.1% (-2.7%) in area.

- Italy maintaining a share of 17.0% (17.0%) in value, and 20.4% (19.0%) in area, now down 1.8% (+5.6%) in value and an increase of 7.7% (+2.6%) in area.

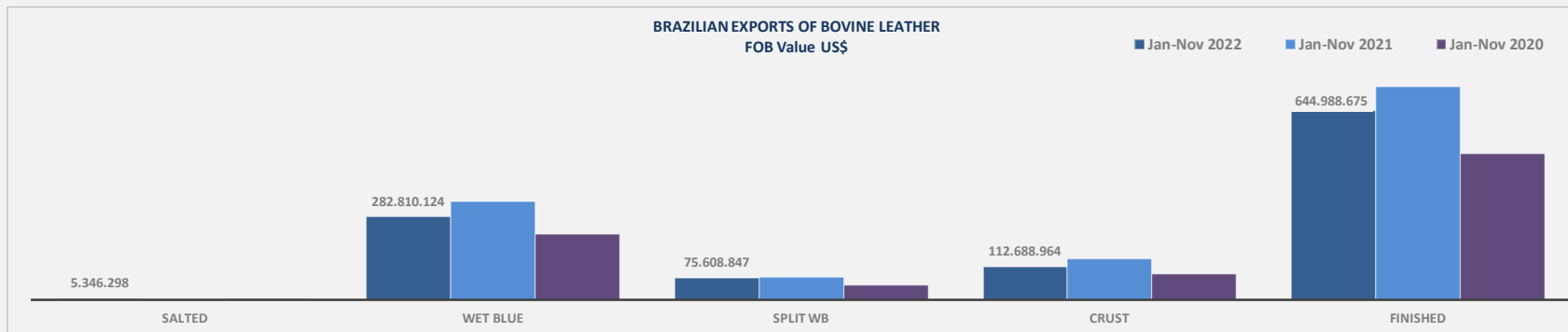
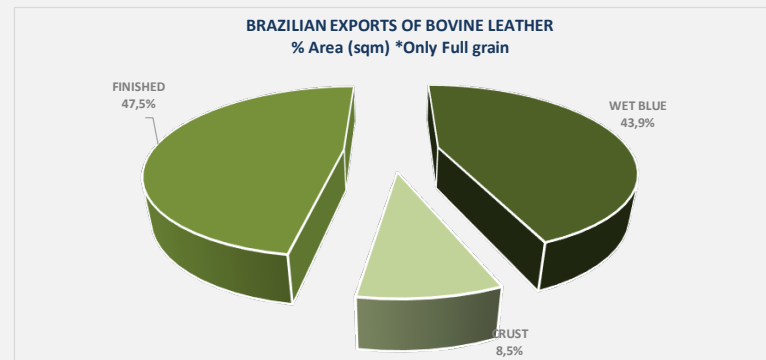
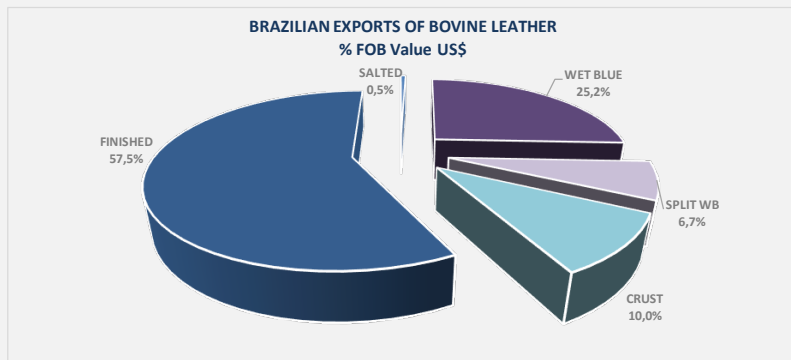
Compared to the same month last year, total exports in November had a drop in value and an increase in area, reflecting the results of the main destinations. Improvements in export volumes occurred in the three markets, with more emphasis on Italy (increase of 4.9 p.p.).

Among the other TOP10 countries in the ranking, we have increases in value in shipments to Thailand (+14.8%) and Germany (+5.6%), while in area only to Hong Kong (+7.2%).

3 BRAZILIAN EXPORTS OF BOVINE LEATHER BY TYPE

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Nov 2022	Jan-Nov 2021	Jan-Nov 2020	2022/2021	2022/2020	Jan-Nov 2022	Jan-Nov 2021	Jan-Nov 2020	2022/2021	2022/2020	Jan-Nov 2022	Jan-Nov 2021	Jan-Nov 2020	2022/2021	2022/2020
SALTED	5.346.298	2.543.468	3.821.293	110,2%	39,9%	-	-	-	-	-	9.794.751	5.429.799	14.390.957	80,4%	-31,9%
WET BLUE	282.810.124	335.317.763	223.035.332	-15,7%	26,8%	43.530.834	43.732.051	57.812.665	-0,5%	-24,7%	172.124.913	174.107.341	249.511.382	-1,1%	-31,0%
SPLIT WB	75.608.847	76.955.788	51.727.952	-1,8%	46,2%	32.743.934	42.978.359	34.792.156	-23,8%	-5,9%	91.528.625	120.869.213	101.599.461	-24,3%	-9,9%
CRUST	112.688.964	139.192.095	87.949.134	-19,0%	28,1%	8.447.781	11.669.793	10.047.748	-27,6%	-15,9%	8.621.001	11.116.154	9.619.072	-22,4%	-10,4%
FINISHED	644.988.675	724.586.228	497.412.207	-11,0%	29,7%	47.070.658	60.731.472	51.649.656	-22,5%	-8,9%	41.005.302	53.099.128	44.991.419	-22,8%	-8,9%
Total	1.121.442.908	1.278.595.342	863.945.918	-12,3%	29,8%	131.793.207	159.111.675	154.302.225	-17,2%	-14,6%	323.074.592	364.621.635	420.112.291	-11,4%	-23,1%

Source: MDIC/SECEX - Prepared by: CICB



■ ANALYSIS OF EXPORTS BY TYPE OF LEATHER

The following variations in Brazilian exports of bovine leather by stage were registered, in the eleven-month period of 2022, compared to the previous year:

- Wet Blue with value reductions of 15.7% (-14.9%) and 0.5% (-7.9%) in area.
- Wet Blue Split with drops of 1.8% (-4.0%) in value and 23.8% (-24.8%) in area.
- Crust with drops of 19.0% (-19.2%) in value and 27.6% (-29.5%) in area.
- Finished with reductions of 11.0% (-10.0%) and 22.5% (-23.2%) in area.

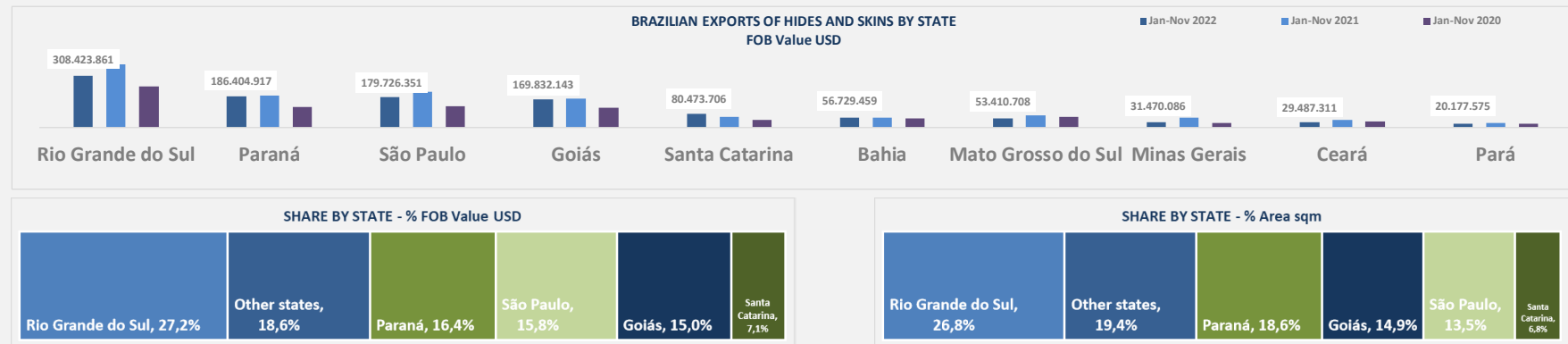
The month of November showed that the sector almost doubled exports of wet blue, compared to the same month last year. Despite the 88.6% increase in area, the value dropped 23.0% in this comparison. This movement of greater falls in values and increase in volumes also occurred in the other stages of leather, showing reductions in average prices for more significant disposal of stocks.

Still compared to the same month of 2021, it is also important to note that in November exports tripled in value and volume of salted bovine hides.

EXPORTS OF HIDES AND SKINS BY STATE

	FOB VALUE (US\$)					AREA (sqm)					WEIGHT (KG)				
	Jan-Nov 2022	Jan-Nov 2021	Jan-Nov 2020	2022	Δ 2021/2020	Jan-Nov 2022	Jan-Nov 2021	Jan-Nov 2020	2022	Δ 2021/2020	Jan-Nov 2022	Jan-Nov 2021	Jan-Nov 2020	2022	Δ 2021/2020
1 Rio Grande do Sul	308.423.861	381.347.903	244.048.006	27,2%	-19,1%	35.577.351	46.375.182	36.432.049	26,8%	-23,3%	61.944.001	81.247.393	74.059.849	19,1%	-23,8%
2 Paraná	186.404.917	191.312.371	121.439.875	16,4%	-2,6%	24.682.732	25.001.365	25.916.984	18,6%	-1,3%	66.273.101	64.612.231	72.877.389	20,5%	2,6%
3 São Paulo	179.726.351	211.472.256	125.807.596	15,8%	-15,0%	17.915.637	24.348.334	18.895.971	13,5%	-26,4%	34.947.599	47.781.188	43.136.804	10,8%	-26,9%
4 Goiás	169.832.143	171.625.120	117.317.168	15,0%	-1,0%	19.821.131	20.916.135	21.109.635	14,9%	-5,2%	56.406.851	59.687.998	61.977.821	17,4%	-5,5%
5 Santa Catarina	80.473.706	60.896.007	44.592.626	7,1%	32,1%	9.067.485	7.915.678	8.009.546	6,8%	14,6%	25.658.300	20.258.523	22.608.694	7,9%	26,7%
6 Bahia	56.729.459	59.573.416	53.749.305	5,0%	-4,8%	7.012.034	7.616.866	9.166.989	5,3%	-7,9%	12.021.877	14.366.130	17.064.823	3,7%	-16,3%
7 Mato Grosso do Sul	53.410.708	69.733.397	60.497.012	4,7%	-23,4%	8.205.042	9.426.883	14.862.066	6,2%	-13,0%	30.959.526	34.503.381	60.921.970	9,6%	-10,3%
8 Minas Gerais	31.470.086	56.398.594	25.859.287	2,8%	-44,2%	3.958.249	8.888.390	5.326.367	3,0%	-55,5%	7.330.346	15.338.534	8.415.961	2,3%	-52,2%
9 Ceará	29.487.311	44.776.761	32.282.476	2,6%	-34,1%	2.006.949	4.334.085	3.691.877	1,5%	-53,7%	2.877.774	5.755.480	5.997.516	0,9%	-50,0%
10 Pará	20.177.575	25.429.444	20.012.063	1,8%	-20,7%	2.994.104	3.013.211	5.098.590	2,3%	-0,6%	15.074.193	14.007.757	23.947.191	4,7%	7,6%
11 Mato Grosso	6.945.962	8.350.562	9.532.358	0,6%	-16,8%	1.025.598	1.063.198	2.413.205	0,8%	-3,5%	3.589.306	3.907.126	9.535.929	1,1%	-8,1%
12 Rio de Janeiro	4.672.704	4.872.873	2.968.713	0,4%	-4,1%	73.921	97.649	29.348	0,1%	-24,3%	43.003	86.222	354.461	0,01%	-50,1%
13 Piauí	2.753.456	2.842.701	1.830.033	0,2%	-3,1%	157.241	215.981	126.816	0,1%	-27,2%	97.313	120.059	68.152	0,03%	-18,9%
14 Rio Grande do Norte	1.440.648	138.087	142.854	0,1%	943,3%	0	0	0	0,0%	-	2.774.700	219.560	350.470	0,9%	1163,8%
15 Pernambuco	1.206.571	1.021.830	1.313.901	0,1%	18,1%	34.458	39.685	45.635	0,03%	-13,2%	1.995.584	1.556.866	3.273.442	0,6%	28,2%
16 Amapá	789.945	421.760	591.214	0,1%	87,3%	0	0	0	0,0%	-	953.255	722.690	1.594.552	0,3%	31,9%
17 Amazonas	747.152	644.685	2.123.289	0,1%	15,9%	82.011	78.914	906.913	0,1%	3,9%	418.995	614.056	3.268.168	0,1%	-31,8%
18 Distrito Federal	597.159	1.794.513	541.410	0,05%	-66,7%	104.591	212.638	111.919	0,1%	-50,8%	522.840	1.034.587	606.281	0,2%	-49,5%
19 Maranhão	167.162	114.039	1.030.800	0,01%	46,6%	23.032	29.815	408.586	0,02%	-22,8%	19.028	43.510	1.117.575	0,01%	-56,3%
20 Tocantins	132.111	84.532	1.744.648	0,01%	56,3%	25.319	8.902	566.289	0,02%	184,4%	131.210	45.550	2.708.653	0,04%	188,1%
21 Espírito Santo	29.061	65.428	30.711	0,003%	-55,6%	277	507	327	0,000%	-45,4%	157	221	159	0,000%	-29,0%
22 Not Declared*	1.365	1.103	0	0,000%	23,8%	66	16	0	0,000%	312,5%	34	13	0	0,000%	161,5%
23 Acre	0	0	2.285.899	0,0%	-	0	0	682.556	0,0%	-	0	0	3.226.499	0,0%	-
24 Rondônia	0	0	1.795.262	0,0%	-	0	0	560.685	0,0%	-	0	0	2.583.835	0,0%	-
25 Sergipe	0	0	1.133.697	0,0%	-	0	0	349.895	0,0%	-	0	0	1.476.057	0,0%	-
Total	1.135.619.413	1.292.917.382	872.670.203	100,0%	-12,2%	132.767.228	159.583.434	154.712.248	100,0%	-16,8%	324.038.993	365.909.075	421.172.251	100,0%	-11,4%

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



■ ANALYSIS OF STATES

The exports of the Brazilian states, in the year, present the following highlights:

- Among the ten largest exporters, only the state of Santa Catarina maintains a positive index in value, with +32.1% (+29.5%). The other states show reductions, where the most worrying falls continue to be registered in Minas Gerais, with -44.2% (-44.3%) and Ceará, with -34.1% (-35.1%).

- Considering the traded volume of the TOP10, the state of Santa Catarina is the only one with growth in area, with +14.6%. Two other states have growth only in terms of weight, such as Pará (+7.6%) and Paraná (+2.6%).

- Rio Grande do Sul maintains its leadership in exports, with a share of 27.2% (27.5%) in value and 26.8% (26.2%) in area. Following the value ranking are Paraná (16.4%), São Paulo (15.8%) and Goiás (15.0%). In area, Goiás is in third (14.9%) and São Paulo in fourth place (13.5%).

■ CLOSING REMARKS

Difficulties in demand in the main markets continue to have a strong impact on Brazilian exports of hides and skins. November export values maintained double-digit declines, compared to the corresponding month of 2021. This situation is repeated for the fifth consecutive month.

Referring to the volume sold, there was an increase of 21.6% in area and 17.8% in weight, which reflect greater exports of wet blue leather with lower prices, as a way to reduce inventories.

As long as industrial activities in China continue to suffer the consequences of the increase in new cases of Covid, in addition to falling demand in the European market, the situation of difficulties in exports should remain in the sector. -