

JANUARY 2024

# Brazilian exports of Hides and Skins

*Brazilian leather*



apexBrasil

MINISTÉRIO DO  
DESENVOLVIMENTO,  
INDÚSTRIA, COMÉRCIO  
E SERVIÇOS

GOVERNO FEDERAL  
**BRASIL**  
UNIÃO E RECONSTRUÇÃO



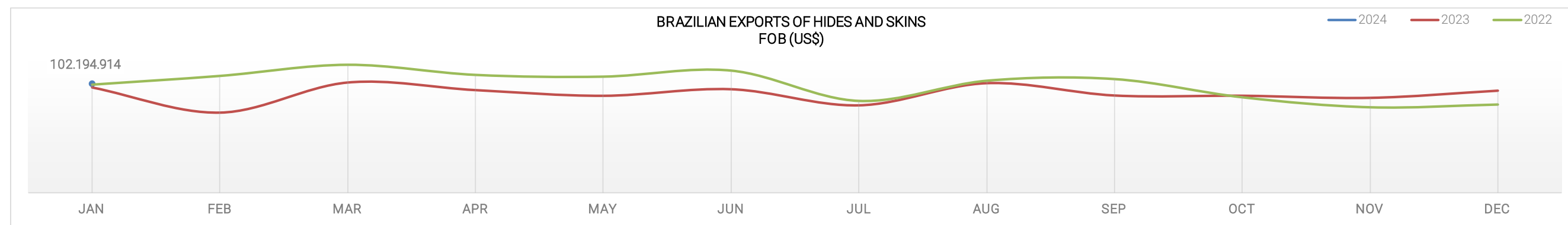
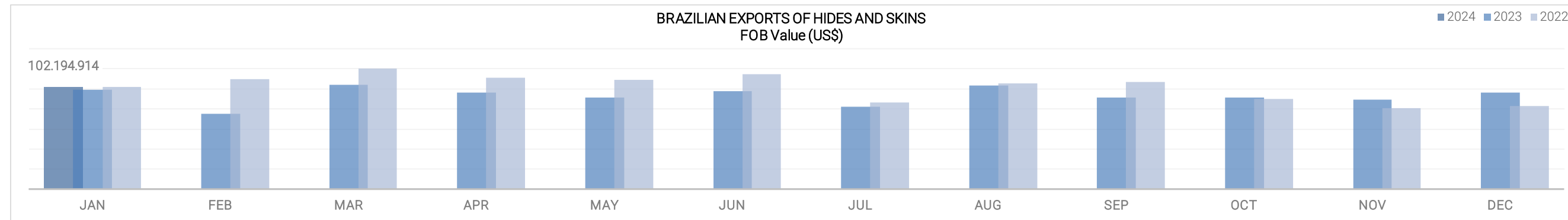
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MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022
JAN	102.194.914	99.097.256	101.697.054	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		75.269.723	109.794.363					10.666.731	11.518.363					29.776.931	25.501.700			
MAR		103.785.252	120.139.328					14.083.877	13.625.210					36.974.204	31.859.528			
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			
<b>Total</b>	<b>102.194.914</b>	<b>1.116.751.780</b>	<b>1.218.838.305</b>		<b>3,1%</b>	<b>0,5%</b>	<b>15.258.153</b>	<b>158.963.267</b>	<b>140.749.731</b>		<b>5,5%</b>	<b>26,5%</b>	<b>42.748.918</b>	<b>430.611.610</b>	<b>354.537.869</b>		<b>4,7%</b>	<b>40,0%</b>

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 CICB, referring to the month of January 2024, registered a value of US\$ 102.2 million, representing increases of 6.4% over the previous month, and 3.1% over the same month last year, when US\$ 99.1 million were exported.

As for volume, 15.3 million square meters and 42.7 thousand tons were exported, which meant, respectively, increases of 5.5% and 4.7% over the same month in 2023. Compared to December, there was also increases of 5.0% in area and 2.9% in weight.

COUNTRIES	FOB VALUE (US\$)			Share	Δ	AREA (sqm)			Share	Δ	WEIGHT (KG)		
	Jan 2024	Jan 2023	Jan 2022	2024	2024/2023	Jan 2024	Jan 2023	Jan 2022	2024	2024/2023	Jan 2024	Jan 2023	Jan 2022
1 China + Hong Kong	30.984.146	34.623.359	33.848.958	30,3%	-10,5%	6.230.884	6.719.209	5.257.837	40,8%	-7,3%	19.717.770	20.970.413	13.931.011
China	28.726.359	32.731.932	26.920.762	28,1%	-12,2%	5.868.199	6.401.705	4.516.563	38,5%	-8,3%	18.526.781	20.214.583	11.983.333
2 United States	17.156.430	16.138.908	13.215.692	16,8%	6,3%	1.219.325	1.179.149	847.724	8,0%	3,4%	1.073.070	1.013.729	733.928
3 Italy	12.110.951	15.461.354	19.611.701	11,9%	-21,7%	2.109.970	2.941.644	2.357.221	13,8%	-28,3%	7.062.021	10.676.994	8.323.081
4 Vietnam	9.560.841	4.767.678	4.618.410	9,4%	100,5%	2.053.603	966.671	830.037	13,5%	112,4%	5.372.378	2.194.763	2.443.454
5 Mexico	6.944.573	2.038.104	4.928.336	6,8%	240,7%	734.150	172.605	387.112	4,8%	325,3%	1.172.995	209.176	482.294
6 Thailand	4.269.764	4.242.041	2.956.046	4,2%	0,7%	466.536	400.553	207.049	3,1%	16,5%	822.670	554.361	286.641
7 Germany	2.940.418	3.006.106	4.972.816	2,9%	-2,2%	233.281	207.707	334.661	1,5%	12,3%	189.772	180.667	290.557
Hong Kong	2.257.787	1.891.427	6.928.196	2,2%	19,4%	362.685	317.504	741.274	2,4%	14,2%	1.190.989	755.830	1.947.678
8 Hungary	1.762.075	1.794.009	1.575.820	1,7%	-1,8%	140.895	132.122	103.389	0,9%	6,6%	120.133	113.090	94.892
9 South Korea	1.724.700	2.662.348	2.464.752	1,7%	-35,2%	167.512	228.777	221.665	1,1%	-26,8%	201.767	227.366	336.662
10 Switzerland	1.534.898	0	492.593	1,5%	-	302.331	0	190.848	2,0%	-	666.060	0	720.740
11 Uruguay	1.324.465	391.852	447.963	1,3%	238,0%	160.388	35.552	70.926	1,1%	351,1%	535.056	252.458	326.020
12 Taiwan	1.142.482	1.488.094	969.539	1,1%	-23,2%	284.462	299.654	203.214	1,9%	-5,1%	749.243	890.546	519.222
13 Slovakia	1.074.635	734.422	0	1,1%	46,3%	66.213	42.498	0	0,4%	55,8%	63.896	43.520	0
14 Norway	941.418	969.159	704.764	0,9%	-2,9%	63.147	58.391	37.679	0,4%	8,1%	44.946	41.919	27.447
15 Indonesia	759.453	666.494	29.060	0,7%	13,9%	118.461	73.595	1.352	0,8%	61,0%	150.279	55.107	1.025
16 India	689.340	610.759	1.837.227	0,7%	12,9%	206.626	153.548	151.589	1,4%	34,6%	669.835	387.202	519.354
17 Bangladesh	685.626	473.877	0	0,7%	44,7%	49.396	39.242	0	0,3%	25,9%	65.148	75.038	0
18 Portugal	548.836	359.886	317.630	0,5%	52,5%	36.810	44.061	36.577	0,2%	-16,5%	27.085	128.319	125.498
19 Malaysia	492.077	681.735	706.081	0,5%	-27,8%	48.836	52.508	49.155	0,3%	-7,0%	43.933	42.086	41.165
20 Spain	436.729	539.109	483.061	0,4%	-19,0%	157.797	105.021	155.495	1,0%	50,3%	343.207	290.278	435.344
21 Netherlands	430.244	419.919	1.131.584	0,4%	2,5%	47.007	42.559	86.975	0,3%	10,5%	45.666	44.370	77.967
22 Turkey	400.212	432.943	0	0,4%	-7,6%	0	40.226	0	0,0%	-100,0%	1.535.298	735.696	0
23 Tunisia	364.262	487.282	678.583	0,4%	-25,2%	20.154	27.363	39.684	0,1%	-26,3%	30.252	44.862	59.514
24 Colombia	276.450	33.041	4.532	0,3%	736,7%	59.816	1.217	166	0,4%	4815,0%	173.015	23.620	181
25 Poland	268.035	721.087	881.247	0,3%	-62,8%	23.953	67.727	79.398	0,2%	-64,6%	19.562	49.720	61.170
26 France	254.858	931	407.071	0,2%	27274,7%	10.132	18	15.845	0,1%	56188,9%	16.207	43	25.065
27 Australia	253.183	189.448	45.931	0,2%	33,6%	21.876	14.313	2.186	0,1%	52,8%	17.607	10.787	3.303
28 Argentina	250.519	1.701.933	945.002	0,2%	-85,3%	12.044	98.893	72.721	0,1%	-87,8%	15.937	108.379	60.517
29 Chile	239.057	262.295	623.498	0,2%	-8,9%	34.592	47.844	84.414	0,2%	-27,7%	43.590	64.127	105.669
30 Nigeria	238.096	219.791	28.080	0,2%	8,3%	0	0	0	0,0%	-	790.760	643.050	54.000
Others (2024: +19.countries)	2.136.141	2.979.292	2.771.077	2,1%	-28,3%	177.956	265.348	239.078	1,2%	-32,9%	969.760	770.828	442.176
<b>Total</b>	<b>102.194.914</b>	<b>99.097.256</b>	<b>101.697.054</b>		<b>3,1%</b>	<b>15.258.153</b>	<b>14.458.015</b>	<b>12.063.997</b>		<b>5,5%</b>	<b>42.748.918</b>	<b>40.842.514</b>	<b>30.527.897</b>

Source: MDIC/SECEX - Prepared by: CICB

## ■ ANALYSIS OF DESTINATIONS

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

- China (without HK) has a share in value of 28.1% (28.4% in 2023) and 38.5% (38.4%) in area, with drops of 12.2% (+13.7 %) in value and 8.3% (+41.3%) in área.

- United States with a share of 16.8% (16.0%) in value and 8.0% (8.5%) in area, with an increase of 6.3% (-20.4%) in value and 3.4% (-9.2%) in área.

- Italy with a share of 11.9% (12.1%) in value, and 13.8% (14.9%) in area, with drops of 21.7% (-33.6%) in value and 28.3% (-12.3%) in área.

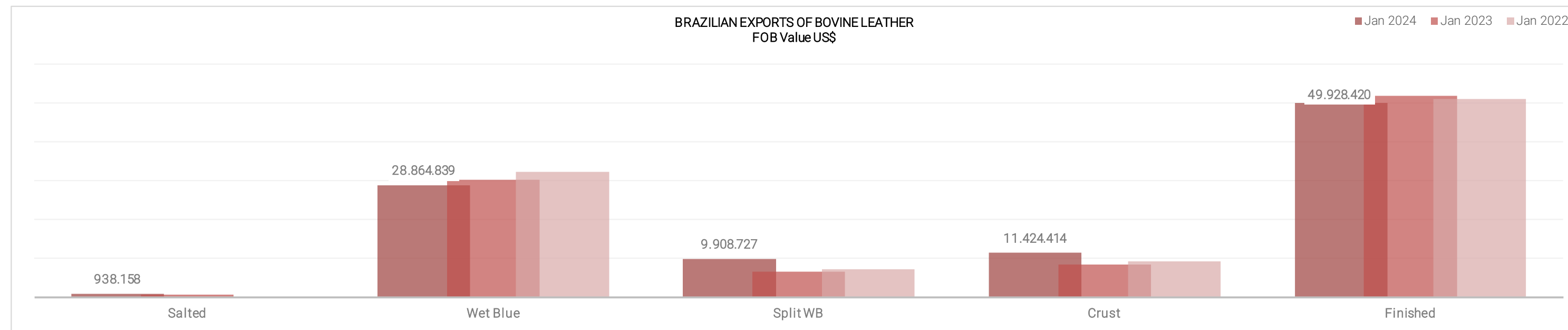
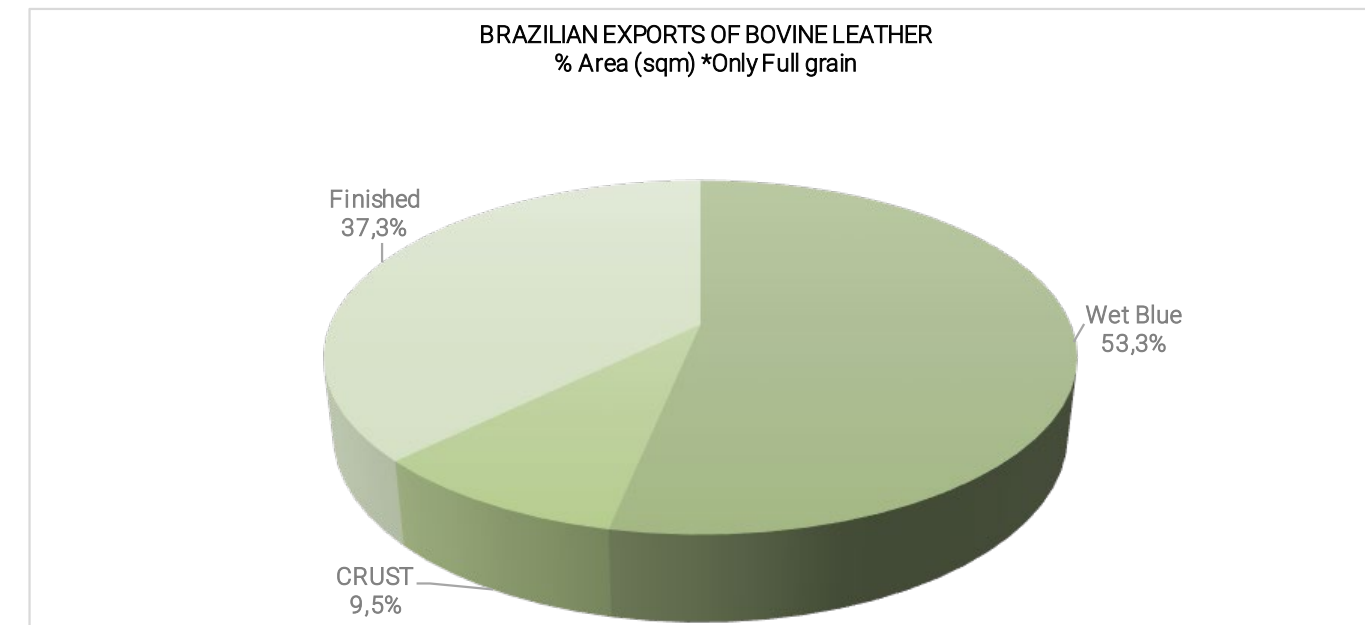
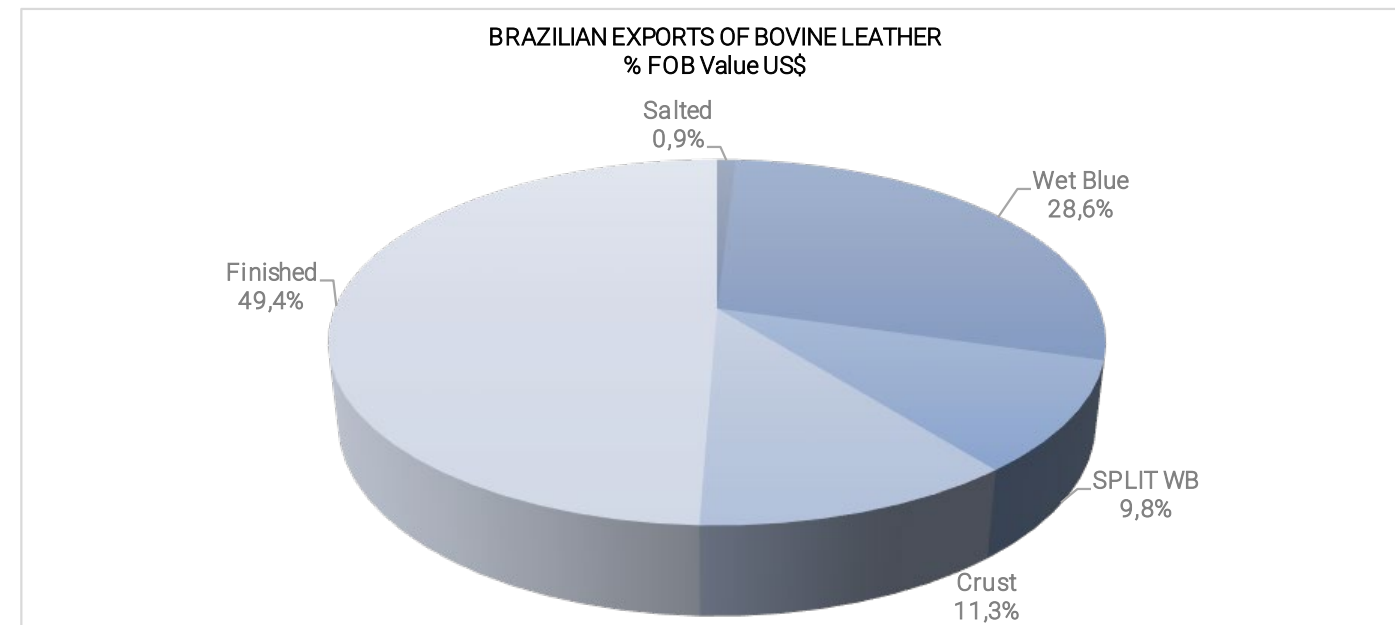
Despite the slight drop in shipments to China in the first month of the year, the share of this market remains practically stable.

The United States and Italy are moving in opposite directions. While exports to the North Americans show improvements, the main European importer continues to worry the sector with apathy and low business activity.

Among the TOP10, two markets show strong starts this year: Vietnam (+100.5% in value and +112.4% in area) and Mexico (+240.7% and +325.3%).

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan 2024	Jan 2023	Jan 2022	2024/2023	2024/2022	Jan 2024	Jan 2023	Jan 2022	2024/2023	2024/2022	Jan 2024	Jan 2023	Jan 2022	2024/2023	2024/2022
Salted	938.158	703.383	213.168	33,4%	340,1%	-	-	-	-	-	3.182.392	1.610.100	290.453	97,7%	995,7%
Wet Blue	28.864.839	30.201.158	32.204.018	-4,4%	-10,4%	6.192.390	6.778.754	4.156.679	-8,7%	49,0%	24.378.104	27.099.786	16.542.856	-10,0%	47,4%
Split WB	9.908.727	6.619.113	7.238.737	49,7%	36,9%	3.522.837	2.724.846	3.553.852	29,3%	-0,9%	10.138.500	7.641.499	9.679.213	32,7%	4,7%
Crust	11.424.414	8.369.006	9.355.889	36,5%	22,1%	1.102.569	704.565	679.108	56,5%	62,4%	1.028.171	753.063	679.556	36,5%	51,3%
Finished	49.928.420	51.784.359	50.880.867	-3,6%	-1,9%	4.333.714	4.221.475	3.628.815	2,7%	19,4%	3.719.391	3.624.272	3.202.580	2,6%	16,1%
<b>Total</b>	<b>101.064.558</b>	<b>97.677.019</b>	<b>99.892.679</b>	<b>3,5%</b>	<b>1,2%</b>	<b>15.151.510</b>	<b>14.429.640</b>	<b>12.018.454</b>	<b>5,0%</b>	<b>26,1%</b>	<b>42.446.558</b>	<b>40.728.720</b>	<b>30.394.658</b>	<b>4,2%</b>	<b>39,7%</b>

Source: MDIC/SECEX - Prepared by: CICB



## ■ ANALYSIS OF TYPES OF LEATHER

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

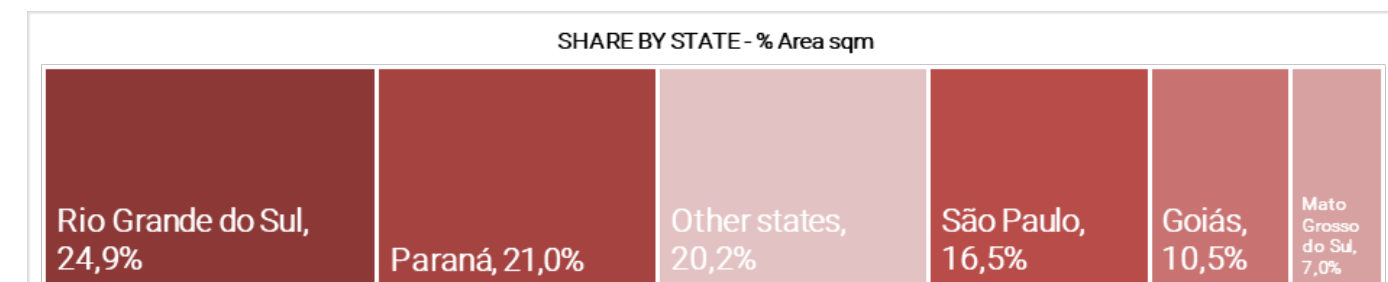
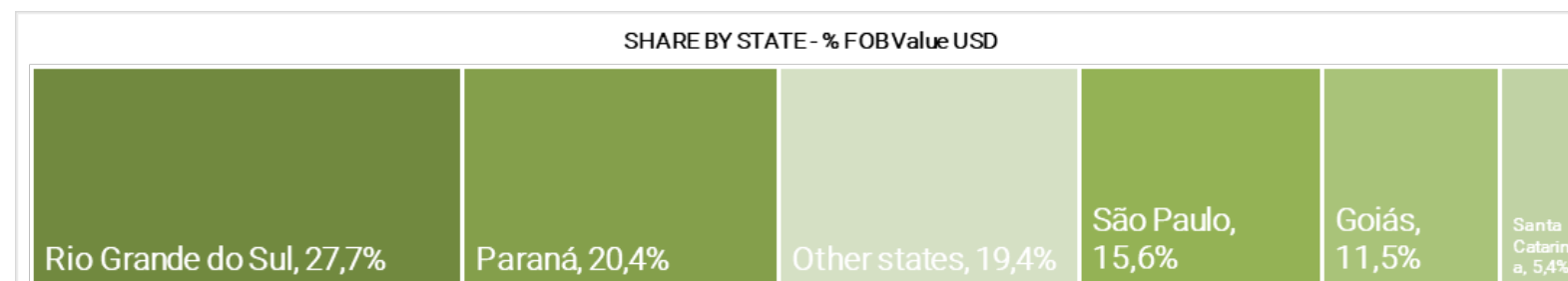
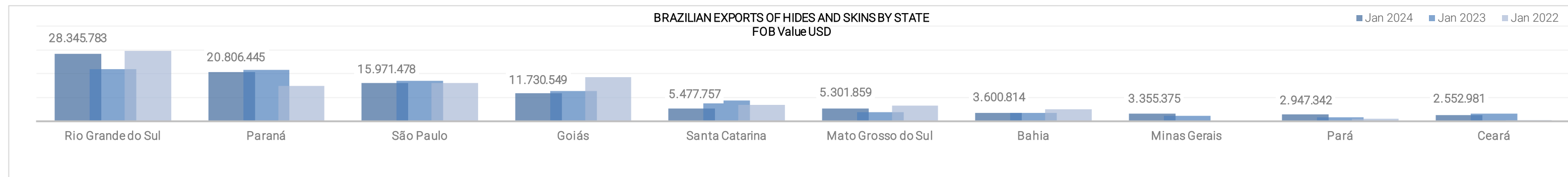
- Wet blue shows a share of 28.6% in value and 53.5% in area, with a monetary reduction of 4.4%, and a drop of 8.7% in area.
- WB split with a share of 9.8% in value, with a monetary increase of 49.7% and 29.3% in area.
- Crust with a share of 11.3% in value and 9.5% in area, with an increase of 36.5% and 56.5%, respectively.
- Finished, with a 49.4% share in value and 37.3% in area, decreased 3.6% in value, but grew 2.7% in area.

WB split and crust continue to show an increase in both indexes, the same situation as at the end of 2023. WB leather has seen decreases in values and volumes, while finished leather shows a slight increase only in volume.



	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan 2024	Jan 2023	Jan 2022	2024	2024/2023		Jan 2024	Jan 2023	Jan 2022	2024	2024/2023		Jan 2024	Jan 2023	Jan 2022	2024	2024/2023	
1 Rio Grande do Sul	28.345.783	21.985.233	29.446.259	27,7%	28,9%	3.792.552	2.906.828	3.479.238	24,9%	30,5%	8.766.779	7.265.165	7.536.433	20,5%	20,7%			
2 Paraná	20.806.445	21.740.053	14.810.430	20,4%	-4,3%	3.204.416	3.369.946	1.792.269	21,0%	-4,9%	9.071.493	10.193.260	4.909.607	21,2%	-11,0%			
3 São Paulo	15.971.478	17.073.612	15.935.720	15,6%	-6,5%	2.521.545	2.632.569	1.938.648	16,5%	-4,2%	6.387.815	6.172.289	3.616.468	14,9%	3,5%			
4 Goiás	11.730.549	12.852.878	18.686.829	11,5%	-8,7%	1.597.211	1.902.745	2.445.075	10,5%	-16,1%	4.250.951	6.606.446	7.442.020	9,9%	-35,7%			
5 Santa Catarina	5.477.757	8.661.738	6.905.246	5,4%	-36,8%	827.431	867.716	608.091	5,4%	-4,6%	2.133.038	1.626.233	1.168.463	5,0%	31,2%			
6 Mato Grosso do Sul	5.301.859	3.844.327	6.671.814	5,2%	37,9%	1.064.545	885.182	815.795	7,0%	20,3%	3.690.513	3.116.695	3.118.190	8,6%	18,4%			
7 Bahia	3.600.814	3.660.654	5.139.458	3,5%	-1,6%	453.346	533.580	503.096	3,0%	-15,0%	952.025	991.214	936.492	2,2%	-4,0%			
8 Minas Gerais	3.355.375	2.321.859	46.253	3,3%	44,5%	629.211	393.377	14.689	4,1%	60,0%	1.640.371	817.206	39.268	3,8%	100,7%			
9 Pará	2.947.342	1.569.072	981.745	2,9%	87,8%	670.613	345.073	142.366	4,4%	94,3%	3.227.705	1.666.833	588.031	7,6%	93,6%			
10 Ceará	2.552.981	3.272.149	616.818	2,5%	-22,0%	184.384	378.508	113.778	1,2%	-51,3%	215.942	755.059	255.763	0,5%	-71,4%			
11 Mato Grosso	997.810	410.053	719.052	1,0%	143,3%	198.307	110.618	92.280	1,3%	79,3%	759.356	351.640	344.410	1,8%	115,9%			
12 Piauí	261.988	163.820	414.553	0,3%	59,9%	15.125	7.570	26.877	0,1%	99,8%	8.232	4.384	13.346	0,02%	87,8%			
13 Rio Grande do Norte	223.109	219.885	28.080	0,2%	1,5%	0	0	0	0,0%	-	819.050	493.400	54.000	1,9%	66,0%			
14 Rio de Janeiro	210.672	694.000	466.925	0,2%	-69,6%	2.100	8.800	4.800	0,01%	-76,1%	78.729	3.926	2.186	0,2%	1905,3%			
15 Pernambuco	191.268	183.355	74.348	0,2%	4,3%	38.997	7.446	5.488	0,3%	423,7%	525.727	318.879	6.908	1,2%	64,9%			
16 Rondônia	183.825	0	0	0,2%	-	49.994	0	0	0,3%	-	180.432	0	0	0,4%	-			
17 Distrito Federal	35.859	65.106	0	0,04%	-44,9%	8.376	12.545	0	0,1%	-33,2%	40.760	65.840	0	0,1%	-38,1%			
18 Amapá	0	0	65.972	0,0%	-	0	0	0	0,0%	-	0	0	77.760	0,0%	-			
19 Amazonas	0	0	687.552	0,0%	-	0	0	81.507	0,0%	-	0	0	418.552	0,0%	-			
20 Maranhão	0	87.957	0	0,0%	-100,0%	0	26.696	0	0,0%	-100,0%	0	60.880	0	0,0%	-100,0%			
21 Tocantins	0	291.505	0	0,0%	-100,0%	0	68.816	0	0,0%	-100,0%	0	333.165	0	0,0%	-100,0%			
<b>Total</b>	<b>102.194.914</b>	<b>99.097.256</b>	<b>101.697.054</b>	<b>100,0%</b>	<b>3,1%</b>	<b>15.258.153</b>	<b>14.458.015</b>	<b>12.063.997</b>	<b>100,0%</b>	<b>5,5%</b>	<b>42.748.918</b>	<b>40.842.514</b>	<b>30.527.897</b>	<b>100,0%</b>	<b>4,7%</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 in January 2024 presented the following highlights:

- Among the ten largest exporters, the growth in value came from Rio Grande do Sul (+28.9%), Mato Grosso do Sul (+37.9%), Minas Gerais (+44.5%) and Pará (+87.8%). The biggest monetary drop was registered in the state of Santa Catarina, with -36.8%.
- Considering traded area, the best performances were in Pará (+94.3%) and Minas Gerais (+60.0%), with a more worrying decrease in Ceará (-51.3%).
- Among the other states, there were positive results in Mato Grosso (+143.3% in value and +79.3% in area), and in Piauí (+59.9% and +99.8%).
- The ranking starts the year with the same positions as at the end of 2023, with Rio Grande do Sul leading in value (27.7% share) and area (24.9%), followed by Paraná (20.4 % in value and 21.0% in area), São Paulo (15.6% and 16.5%) and Goiás (11.5% and 10.5%). By weight, Paraná leads with 21.2%, followed by Rio Grande do Sul with 20.5.

## ■ CLOSING REMARKS

The month of January registered a total shipment of 42.7 thousand tons of hides and skins, the highest volume since September 2020, when the weight of 45.8 thousand tons was shipped abroad. Compared to the same month last year, we also have increases in the three indexes: +3.1% in value, +5.5% in area and +4.7% in weight.

This balance in variations in value and volume indexes shows stability in average business prices. Compared to December, wet blue leather had a slight drop of 3.4% in average price, but other leathers had increases. As of January 2023, wet blue leather has recovered 20 cents per square meter and scrap leather has improved by 11 cents per kilo, while other leathers show declines.

Considering the markets, it is still too early to make a deeper assessment of how the scenarios will behave during the year, however shipments to China and Italy have already shown declines, in the first case being a reflection of the Lunar New Year at the beginning of February. The United States was the only one that showed a positive reaction in the month, showing that the bad news may have more focus on the European continent, where recovery is expected for the second half of the year.-