



# BRAZILIAN EXPORTS OF HIDES AND SKINS

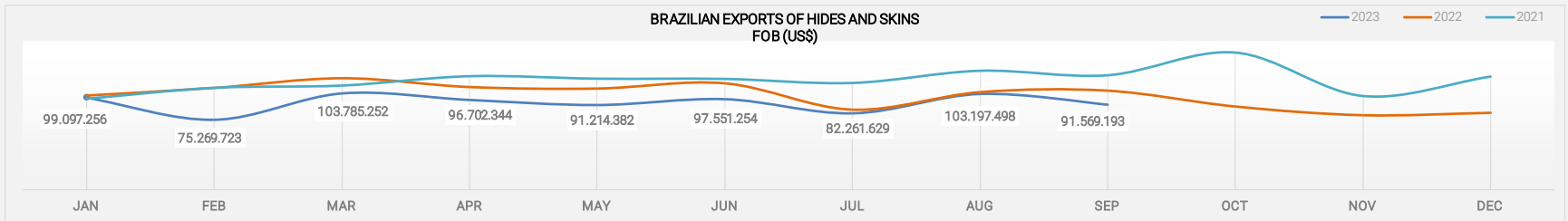
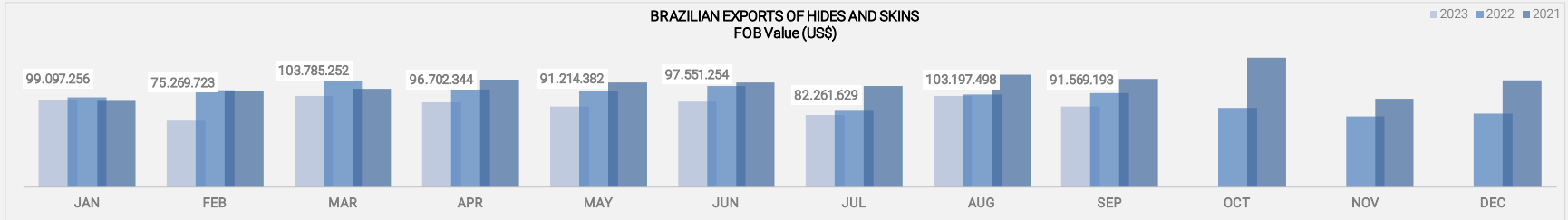
## September 2023

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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%	14.458.015	12.063.997	14.794.446	32,6%	19,8%	-2,3%	40.842.514	30.527.897	38.010.157	33,9%	33,8%	7,5%
FEB	75.269.723	109.794.363	109.528.720	-24,0%	-31,4%	-31,3%	10.666.731	11.518.363	15.698.373	-26,2%	-7,4%	-32,1%	29.776.931	25.501.700	38.218.258	-27,1%	16,8%	-22,1%
MAR	103.785.252	120.139.328	111.927.496	37,9%	-13,6%	-7,3%	14.083.877	13.625.210	15.133.632	32,0%	3,4%	-6,9%	36.974.204	31.859.528	34.265.446	24,2%	16,1%	7,9%
APR	96.702.344	110.738.209	121.951.096	-6,8%	-12,7%	-20,7%	13.711.003	11.773.200	16.318.524	-2,6%	16,5%	-16,0%	35.454.984	28.030.076	36.417.387	-4,1%	26,5%	-2,6%
MAY	91.214.382	109.124.938	119.279.811	-5,7%	-16,4%	-23,5%	12.063.660	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	97.551.254	114.733.220	119.014.618	6,9%	-15,0%	-18,0%	13.615.601	12.737.959	14.251.467	12,9%	6,9%	-4,5%	34.013.962	32.538.087	31.809.207	8,5%	4,5%	6,9%
JUL	82.261.629	86.582.958	114.704.199	-15,7%	-5,0%	-28,3%	11.111.985	9.168.223	12.987.305	-18,4%	21,2%	-14,4%	29.558.115	21.825.224	28.797.843	-13,1%	35,4%	2,6%
AUG	103.197.498	105.318.890	127.753.281	25,5%	-2,0%	-19,2%	14.636.232	12.398.155	15.456.776	31,7%	18,1%	-5,3%	40.918.684	32.250.962	31.412.555	38,4%	26,9%	30,3%
SEP	91.569.193	106.870.559	122.947.850	-11,3%	-14,3%	-25,5%	13.494.619	12.998.266	13.406.581	-7,8%	3,8%	0,7%	36.476.975	35.798.746	32.398.066	-10,9%	1,9%	12,6%
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>840.648.531</b>	<b>1.218.838.305</b>	<b>1.414.447.447</b>		<b>-12,9%</b>	<b>-19,6%</b>	<b>117.841.723</b>	<b>140.749.731</b>	<b>172.306.969</b>		<b>9,6%</b>	<b>-11,5%</b>	<b>315.356.056</b>	<b>354.537.869</b>	<b>395.578.583</b>		<b>19,8%</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 SECEX (Secretariat of Foreign Trade) of the Ministry of Development, Industry, Commerce and Services and analyzed by CICB, referring to the month of September 2023, registered a value of US\$ 91.6 million, representing drops of 11.3% compared to the previous month and 14.3% compared to the same month last year, when US\$ 106.9 million were exported.

Considering volume, 13.5 million square meters and 36.5 thousand tons were exported, which meant, respectively, increases of 3.8% and 1.9% over the same month in 2022. Compared to August, there were decreases 7.8% in area and 10.9% in weight.

The accumulated result for the first three quarters of the year totaled US\$840.6 million, 12.9% below the same range in 2022, but increases of 9.6% in traded area and 19.8% in weight.

## BRAZILIAN EXPORTS OF HIDES AND SKINS BY DESTINATION

COUNTRIES	FOB VALUE (US\$)			Share		AREA (sqm)			Share		WEIGHT (KG)			Share	
	Jan-Sep 2023	Jan-Sep 2022	Jan-Sep 2021	2023	2023/2022	Jan-Sep 2023	Jan-Sep 2022	Jan-Sep 2021	2023	2023/2022	Jan-Sep 2023	Jan-Sep 2022	Jan-Sep 2021	2023	2023/2022
1 China + Hong Kong	262.186.747	269.117.594	360.846.673	31,2%	-2,6%	50.301.865	39.286.501	53.315.958	42,7%	28,0%	152.371.587	108.983.065	141.669.675	48,3%	39,8%
China	235.448.928	220.910.516	314.053.144	28,0%	6,6%	45.306.120	33.421.619	47.973.205	38,4%	35,6%	139.502.135	94.173.736	127.487.129	44,2%	48,1%
2 United States	139.030.563	182.039.707	151.057.696	16,5%	-23,6%	10.519.306	11.924.848	12.028.186	8,9%	-11,8%	9.245.783	10.299.514	10.296.519	2,9%	-10,2%
3 Italy	103.018.007	163.520.348	144.636.679	12,3%	-37,0%	17.838.519	20.319.434	19.796.994	15,1%	-12,2%	57.835.755	68.473.026	59.011.246	18,3%	-15,5%
4 Vietnam	50.370.835	50.464.936	79.658.493	6,0%	-0,2%	9.877.057	8.909.850	14.574.986	8,4%	10,9%	23.468.737	21.738.795	32.131.728	7,4%	8,0%
5 Mexico	40.608.814	18.766.462	32.403.393	4,8%	116,4%	3.846.862	1.809.541	2.955.320	3,3%	112,6%	4.651.261	3.897.809	4.301.553	1,5%	19,3%
6 South Korea	37.373.147	33.285.303	39.228.329	4,4%	12,3%	3.558.274	1.981.824	2.390.204	3,0%	79,5%	4.915.482	1.938.623	2.143.499	1,6%	153,6%
7 Thailand	31.950.656	35.452.384	31.301.900	3,8%	-9,9%	3.295.082	2.593.457	2.797.222	2,8%	27,1%	5.357.992	4.618.674	4.666.649	1,7%	16,0%
Hong Kong	26.737.819	48.207.078	46.793.529	3,2%	-44,5%	4.995.745	5.864.882	5.342.753	4,2%	-14,8%	12.869.452	14.809.329	14.182.546	4,1%	-13,1%
8 Germany	25.581.684	41.434.368	38.435.334	3,0%	-38,3%	1.974.919	2.813.082	3.268.855	1,7%	-29,8%	1.668.202	2.321.542	3.007.430	0,5%	-28,1%
9 Hungary	15.153.043	18.080.292	19.812.697	1,8%	-16,2%	1.228.993	1.210.409	1.552.503	1,0%	1,5%	1.056.610	1.117.695	1.427.230	0,3%	-5,5%
10 Taiwan	11.666.582	14.059.664	17.471.075	1,4%	-17,0%	2.783.640	3.576.106	5.569.582	2,4%	-22,2%	7.881.403	9.043.451	14.294.934	2,5%	-12,8%
11 Uruguay	9.684.329	6.034.706	7.338.862	1,2%	60,5%	1.190.627	833.855	1.086.770	1,0%	42,8%	3.556.512	3.148.239	3.603.312	1,1%	13,0%
12 Tunisia	9.026.851	6.851.083	7.614.251	1,1%	31,8%	570.071	424.226	502.479	0,5%	34,4%	879.386	669.275	786.868	0,3%	31,4%
13 Argentina	8.254.194	8.979.452	5.487.264	1,0%	-8,1%	586.101	702.418	573.093	0,5%	-16,6%	690.360	698.634	524.143	0,2%	-1,2%
14 Netherlands	7.401.806	8.926.847	9.797.682	0,9%	-17,1%	745.273	728.254	850.733	0,6%	2,3%	722.319	684.799	804.158	0,2%	5,5%
15 Spain	7.074.988	3.657.199	5.419.144	0,8%	93,5%	1.779.755	1.206.100	2.409.890	1,5%	47,6%	5.005.149	3.438.699	6.653.351	1,6%	45,6%
16 Norway	6.631.394	11.281.270	9.666.811	0,8%	-41,2%	459.194	647.869	619.490	0,4%	-29,1%	321.631	459.571	459.799	0,1%	-30,0%
17 Slovakia	6.209.741	2.411.569	338.283	0,7%	157,5%	395.161	118.373	27.448	0,3%	233,8%	386.267	156.778	20.592	0,1%	146,4%
18 India	5.873.405	10.902.690	8.093.179	0,7%	-46,1%	1.285.724	1.245.596	969.969	1,1%	3,2%	4.257.201	4.373.934	2.624.848	1,3%	-2,7%
19 Turkey	4.704.131	833.412	155.833	0,6%	464,4%	73.450	26.833	10.048	0,1%	173,7%	10.046.136	1.282.555	90.263	3,2%	683,3%
20 Poland	4.186.365	7.260.529	5.188.174	0,5%	-42,3%	382.218	652.203	507.973	0,3%	-41,4%	314.860	542.414	404.483	0,1%	-42,0%
21 Switzerland	3.710.242	2.388.090	5.828.598	0,4%	55,4%	872.892	725.052	1.235.818	0,7%	20,4%	3.127.111	2.837.851	3.156.651	1,0%	10,2%
22 Portugal	3.709.272	3.335.330	4.865.660	0,4%	11,2%	343.003	289.853	490.057	0,3%	18,3%	804.675	643.324	828.493	0,3%	25,1%
23 Malaysia	3.659.592	6.475.209	5.185.575	0,4%	-43,5%	280.002	444.222	406.054	0,2%	-37,0%	223.917	361.633	320.849	0,1%	-38,1%
24 France	3.474.812	3.777.839	1.321.603	0,4%	-8,0%	148.428	148.471	60.775	0,1%	0,0%	223.078	237.090	95.735	0,1%	-5,9%
25 Canada	3.360.844	3.674.103	3.893.440	0,4%	-8,5%	204.088	215.155	254.623	0,2%	-5,1%	185.889	204.980	221.412	0,1%	-9,3%
26 Japan	2.889.109	2.140.499	1.482.722	0,3%	35,0%	250.866	151.868	214.676	0,2%	65,2%	364.164	327.526	581.189	0,1%	11,2%
27 South Africa	2.879.435	2.636.646	5.185.048	0,3%	9,2%	296.929	311.905	565.773	0,3%	-4,8%	458.225	345.657	952.701	0,1%	32,6%
28 Indonesia	2.869.641	16.410.192	12.641.696	0,3%	-82,5%	358.813	1.423.554	1.231.796	0,3%	-74,8%	272.049	1.114.756	1.119.964	0,1%	-75,6%
29 Chile	2.658.910	4.376.719	3.819.621	0,3%	-39,2%	319.523	476.923	443.795	0,3%	-33,0%	394.116	574.721	483.742	0,1%	-31,4%
30 Cambodia	2.406.429	1.426.897	1.597.030	0,3%	68,6%	189.300	63.606	236.793	0,2%	197,6%	1.381.837	82.555	576.209	0,4%	1573,8%
Others (2023: +47 countries)	23.042.963	24.998.180	25.176.983	2,7%	-7,8%	1.885.788	2.221.943	2.263.164	1,6%	-15,1%	13.288.362	8.697.774	7.726.394	4,2%	52,8%
<b>Total</b>	<b>840.648.531</b>	<b>964.999.519</b>	<b>1.044.949.728</b>		<b>-12,9%</b>	<b>117.841.723</b>	<b>107.483.331</b>	<b>133.211.027</b>		<b>9,6%</b>	<b>315.356.056</b>	<b>263.314.959</b>	<b>304.985.619</b>		<b>19,8%</b>

Source: MDIC/SECEX - Prepared by: CICB

## ■ ANALYSIS OF DESTINATIONS

The three main destinations for Brazilian leather show the following information in the year to date:

- China (without HK) has a share in value of 28.0% (previously 27.8%) and 38.4% (37.9%) in area, with a monetary increase of 6.6% (+6, 0%) and area of 35.6% (+34.7%).
- United States with a share of 16.5% (16.9%) in value, and with 8.9% (9.2%) in area, shows drops of 23.6% (-22.0%) in value and 11.8% (-9.2%) in area.
- Italy maintaining a share of 12.3% (12.3%) in value, and 15.1% (15.1%) in area, with drops of 37.0% (-36.7%) in value and 12.2% (-10.6%) in area.

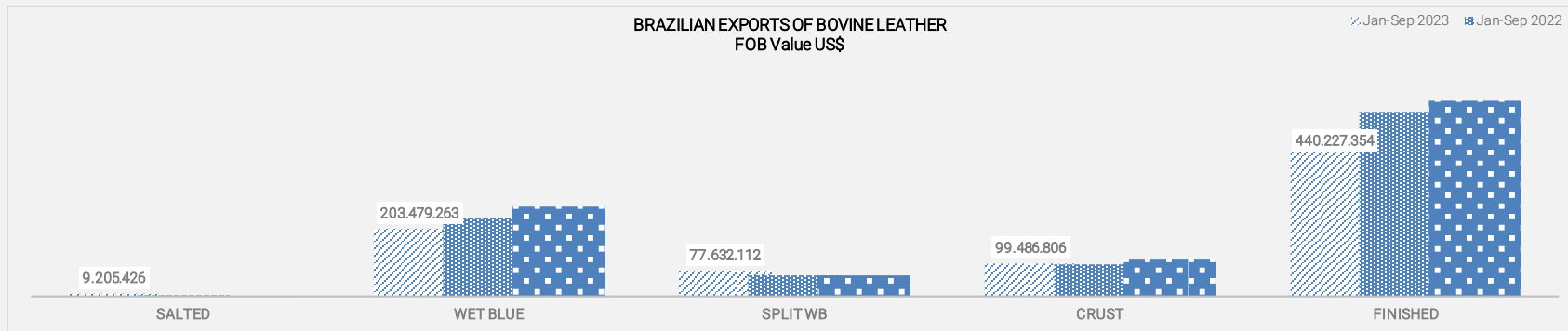
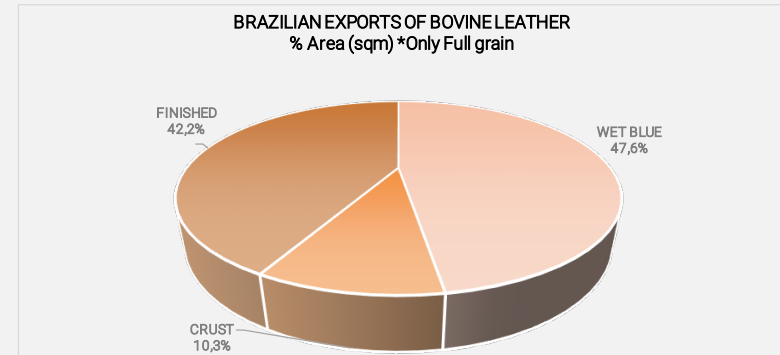
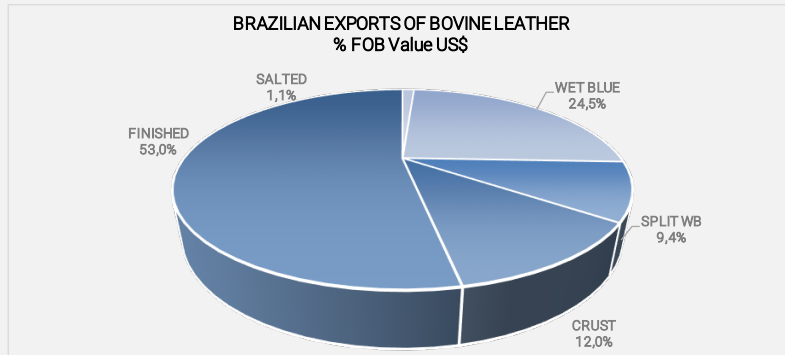
Italy and the United States once again worsen their annual indicators, maintaining declines in value and area, showing that the expected reaction is not likely to happen this year. On the other hand, China continues at positive levels and with monthly responses, even if mild.

Among the other countries in the TOP10, the highlight is South Korea, with an increase of 116.4% in value and 112.6% in area.

### 3 BRAZILIAN EXPORTS OF BOVINE LEATHER BY TYPE

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Sep 2023	Jan-Sep 2022	Jan-Sep 2021	2023/2022	2023/2021	Jan-Sep 2023	Jan-Sep 2022	Jan-Sep 2021	2023/2022	2023/2021	Jan-Sep 2023	Jan-Sep 2022	Jan-Sep 2021	2023/2022	2023/2021
SALTED	9.205.426	4.172.670	2.148.545	120,6%	328,4%	-	-	-	-	-	21.487.899	7.461.128	4.812.079	188,0%	346,5%
WET BLUE	203.479.263	237.437.174	269.376.733	-14,3%	-24,5%	41.833.241	32.571.340	35.938.369	28,4%	16,4%	168.051.181	136.722.843	143.640.701	22,9%	17,0%
SPLIT WB	77.632.112	62.539.098	63.899.114	24,1%	21,5%	29.559.144	27.553.462	36.140.900	7,3%	-18,2%	83.849.867	76.284.514	101.665.448	9,9%	-17,5%
CRUST	99.486.806	95.478.234	111.001.550	4,2%	-10,4%	9.020.350	7.086.410	9.735.200	27,3%	-7,3%	8.781.538	7.240.192	9.217.040	21,3%	-4,7%
FINISHED	440.227.354	553.357.676	587.280.896	-20,4%	-25,0%	37.103.358	39.955.467	51.024.561	-7,1%	-27,3%	32.379.075	34.835.391	44.635.459	-7,1%	-27,5%
<b>Total</b>	<b>830.030.961</b>	<b>952.984.852</b>	<b>1.033.706.838</b>	<b>-12,9%</b>	<b>-19,7%</b>	<b>117.516.093</b>	<b>107.166.679</b>	<b>132.839.030</b>	<b>9,7%</b>	<b>-11,5%</b>	<b>314.549.560</b>	<b>262.544.068</b>	<b>303.970.727</b>	<b>19,8%</b>	<b>3,5%</b>

Source: MDIC/SECEX - Prepared by: CICB



## ■ ANALYSIS OF EXPORTS BY TYPE OF LEATHER

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

- Wet blue with a reduction in value of 14.3% (-11.8%), but an increase of 28.4% (+34.3%) in area.
- Split WB maintaining an increase of 24.1% (+24.1%) in value, and 7.3% (+6.4%) in area.
- Crust up 4.2% (+1.4%) in value, and 27.3% (+24.0%) in area.
- Finished decreasing 20.4% (-20.7%) in value and 7.1% (-7.5%) in area.

Wet blue exports fell again in September, both in value (-30.5%) and area (-3.7%). On the other hand, exports of Split WB and Crust continue strongly, exceeding their monthly averages of 3.3 and 1.0 million square meters, respectively.

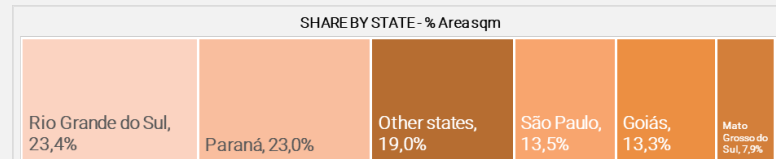
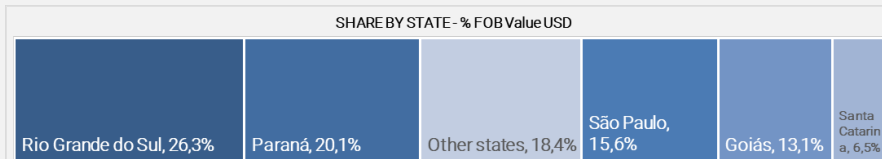
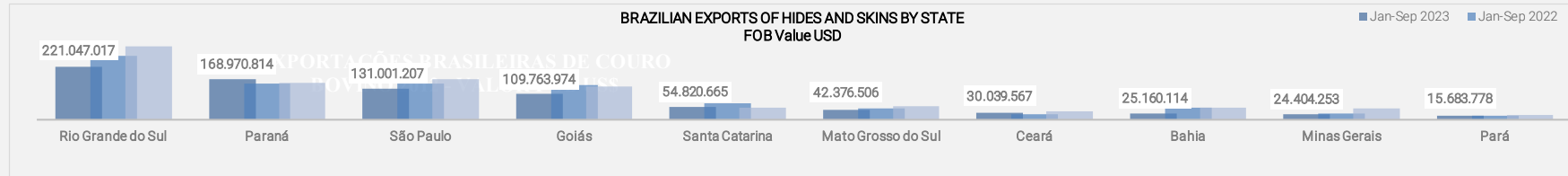
It is important to note the reduction in the pace of exports of salted hides for the third consecutive month, falling below US\$ 1 million and close to 2 thousand tons in September.



# EXPORTS OF HIDES AND SKINS BY STATE

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-Sep 2023	Jan-Sep 2022	Jan-Sep 2021	2023	2023/2022		Jan-Sep 2023	Jan-Sep 2022	Jan-Sep 2021	2023	2023/2022		Jan-Sep 2023	Jan-Sep 2022	Jan-Sep 2021	2023	2023/2022	
1 Rio Grande do Sul	221.047.017	267.005.629	307.034.001	26,3%	-17,2%	27.583.185	27.713.088	38.689.296	23,4%	-0,5%	61.247.297	52.288.335	68.058.003	19,4%	17,1%			
2 Paraná	168.970.814	152.269.433	154.102.622	20,1%	11,0%	27.055.303	19.605.722	20.563.389	23,0%	38,0%	75.114.002	51.230.384	52.677.408	23,8%	46,6%			
3 São Paulo	131.001.207	150.885.325	171.090.531	15,6%	-13,2%	15.899.146	14.869.387	20.406.454	13,5%	6,9%	33.421.792	28.606.387	40.364.111	10,6%	16,8%			
4 Goiás	109.763.974	145.242.068	138.163.800	13,1%	-24,4%	15.691.153	16.529.647	17.430.647	13,3%	-5,1%	46.643.515	46.404.061	49.040.010	14,8%	0,5%			
5 Santa Catarina	54.820.665	67.548.805	51.580.160	6,5%	-18,8%	6.502.539	7.344.584	6.844.628	5,5%	-11,5%	13.063.374	20.627.368	17.948.652	4,1%	-36,7%			
6 Mato Grosso do Sul	42.376.506	46.021.473	55.316.142	5,0%	-7,9%	9.254.774	6.691.190	7.726.892	7,9%	38,3%	32.102.329	24.812.297	28.435.200	10,2%	29,4%			
7 Ceará	30.039.567	23.592.478	35.897.714	3,6%	27,3%	2.712.925	1.555.808	3.516.534	2,3%	74,4%	3.823.589	1.867.474	4.565.813	1,2%	104,7%			
8 Bahia	25.160.114	50.980.431	49.228.341	3,0%	-50,6%	3.596.542	5.984.357	6.462.164	3,1%	-39,9%	6.846.965	9.864.435	12.310.260	2,2%	-30,6%			
9 Minas Gerais	24.404.253	27.410.292	46.965.713	2,9%	-11,0%	4.495.145	3.449.510	7.716.871	3,8%	30,3%	8.946.409	6.480.806	13.333.040	2,8%	38,0%			
10 Pará	15.683.778	17.587.065	18.981.321	1,9%	-10,8%	3.328.546	2.556.734	2.352.378	2,8%	30,2%	16.046.630	12.752.606	10.816.108	5,1%	25,8%			
11 Mato Grosso	4.517.846	5.928.466	6.990.183	0,5%	-23,8%	1.001.542	762.466	910.382	0,8%	31,4%	3.354.707	2.861.176	3.427.141	1,1%	17,2%			
12 Rio de Janeiro	4.112.113	3.686.056	3.871.556	0,5%	11,6%	138.982	62.721	84.507	0,1%	121,6%	326.331	37.921	81.328	0,1%	760,6%			
13 Rio Grande do Norte	2.755.585	1.219.926	110.398	0,3%	125,9%	0	0	0	0,0%	-	6.353.590	2.270.700	140.560	2,0%	179,8%			
14 Pernambuco	2.321.861	1.047.077	779.778	0,3%	121,7%	37.279	34.458	28.170	0,03%	8,2%	5.678.635	1.455.014	1.450.580	1,8%	290,3%			
15 Piauí	1.456.329	2.475.158	2.191.904	0,2%	-41,2%	75.344	140.593	179.626	0,1%	-46,4%	43.255	87.994	99.810	0,01%	-50,8%			
16 Tocantins	783.287	132.111	84.532	0,1%	492,9%	177.857	25.319	8.902	0,2%	602,5%	874.075	131.210	45.550	0,3%	566,2%			
17 Distrito Federal	585.874	358.836	1.465.898	0,1%	63,3%	120.659	56.920	181.248	0,1%	112,0%	641.495	286.500	880.117	0,2%	123,9%			
18 Maranhão	377.854	136.070	114.039	0,04%	177,7%	86.508	18.577	29.815	0,1%	365,7%	225.015	14.612	43.510	0,1%	1439,9%			
19 Amazonas	232.400	747.152	591.485	0,03%	-68,9%	47.121	82.011	78.914	0,04%	-42,5%	234.310	418.995	613.613	0,1%	-44,1%			
20 Rondônia	143.375	0	0	0,02%	-	37.068	0	0	0,0%	-	131.676	0	0	0,04%	-			
21 Paraíba	52.191	0	0	0,01%	-	0	0	0	0,0%	-	106.000	0	0	0,03%	-			
22 Amapá	31.371	705.611	368.576	0,004%	-95,6%	0	0	0	0,0%	#DIV/0!	131.000	816.555	654.710	0,04%	-84,0%			
23 Espírito Santo	10.550	18.692	19.931	0,001%	-43,6%	105	173	194	0,000%	-	65	95	82	0,000%	-31,6%			
24 Not Declared *	0	1.365	1.103	0,0%	-100,0%	0	66	16	0,0%	-100,0%	0	34	13	0,0%	-100,0%			
<b>Total</b>	<b>840.648.531</b>	<b>964.999.519</b>	<b>1.044.949.728</b>	<b>100,0%</b>	<b>-12,9%</b>	<b>117.841.723</b>	<b>107.483.331</b>	<b>133.211.027</b>	<b>100,0%</b>	<b>9,6%</b>	<b>315.356.056</b>	<b>263.314.959</b>	<b>304.985.619</b>	<b>100,0%</b>	<b>19,8%</b>			

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



## ■ ANALYSIS OF STATES

Exports from Brazilian states present, in these nine months, the following highlights:

- The states of Ceará and Paraná show positive indicators in values: +27.3% and +11.0%, respectively.

Bahia continues to be the negative highlight, with -50.6%.

- Considering the traded area there are six states with growth in area, with Ceará being the highlight, with +74.4%.

- Among all other states, Tocantins, Maranhão, Rio Grande do Norte and Pernambuco show significant growth in values and volumes.

- Rio Grande do Sul remains the leader in value (26.3% share) and area (23.4%), followed by Paraná (20.1% in value and 23.0% in area). São Paulo and Goiás are the others placed in the ranking of these two indicators.

## ■ CLOSING REMARKS

Volumes exported by Brazilian tanneries continued to rise in September, with +3.8% in area and +1.9% in weight, compared to the same month of the previous year. Analyzing the entire period of 2023, we only see a drop in volume in February, with -7.4% in area. In terms of value, we have negative indexes, with monthly drops that worsened again this month, reaching above 10%, after reaching close to stability in August (only a 2.0% drop). This opposite path of values and volumes is clearly demonstrated in the analysis of average export prices, where only Split WB still shows an increase in the annual comparison. All other leathers have fallen, with emphasis on the price of WB, which has a reduction of 27.9% on the average price of 2022.

The registers we have are that leather exports continue to face a very difficult market, and the vast majority of bids received present quotations below the prices demanded by exporters.

The Milan fairs, including the most important for leather, Lineapelle, were the biggest event of the season. Lineapelle exceeded all projections in the number of visitors and exhibitors. Unfortunately, regarding prices, hopes for an improvement did not come true. Despite the optimism present at the fair, the facts of the current market scenario prevailed. Difficulties continue in the demand for leather for footwear and in the automobile sector, which are still far from pre-pandemic levels. –