



BRAZILIAN EXPORTS OF HIDES AND SKINS

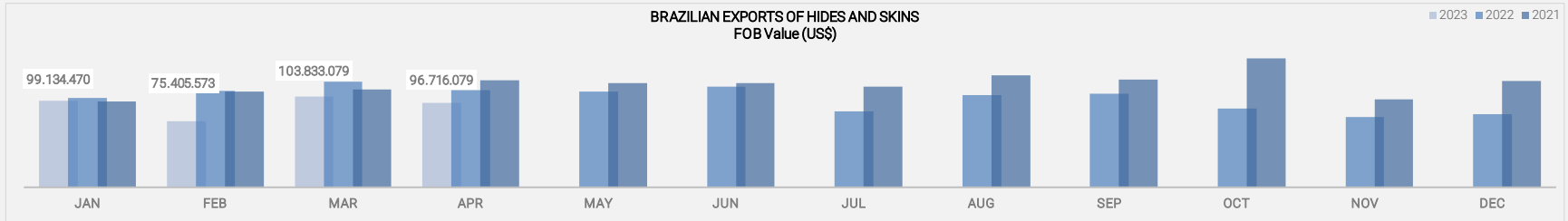
April 2023

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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	99.134.470	101.697.054	97.842.657	19,1%	-2,5%	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	103.833.079	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%	36.974.234	31.859.528	34.265.446	24,2%	16,1%	7,9%
APR	96.716.079	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		109.124.938	119.279.811					11.199.958	15.163.923					24.982.739	33.656.700			
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			
Total	375.089.201	1.218.838.305	1.414.447.447		-15,2%	-15,0%	52.932.897	140.749.731	172.306.969		8,1%	-14,5%	143.072.218	354.537.869	395.578.583		23,4%	-2,6%

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 April 2023, registered a value of US\$ 96.7 million, representing decreases 6.9% over the previous month, and 12.7% over the same month last year, when US\$ 110.7 million were exported.

Considering the total exported in square meters, in April 13.7 million were shipped, a reduction of 2.7% over March, but an increase of 16.5% compared to the same month of last year, when the total was 11.8 million sqm.

The first four months of the year totaled US\$ 375.1 million, 15.2% below the same period in 2022, but 8.1% above in traded area, with 52.9 million square meters.

BRAZILIAN EXPORTS OF HIDES AND SKINS BY DESTINATION

COUNTRIES	FOB VALUE (US\$)			Share		AREA (sqm)			Share		WEIGHT (KG)			Share	
	Jan-Apr 2023	Jan-Apr 2022	Jan-Apr 2021	2023	2023/2022	Jan-Apr 2023	Jan-Apr 2022	Jan-Apr 2021	2023	2023/2022	Jan-Apr 2023	Jan-Apr 2022	Jan-Apr 2021	2023	2023/2022
1 China + Hong Kong	121.822.216	136.715.374	141.258.930	32,5%	-10,9%	23.393.899	19.746.052	22.436.738	44,2%	18,5%	72.261.896	52.836.254	58.304.218	50,5%	36,8%
China	112.069.889	112.135.202	124.099.920	29,9%	-0,1%	21.318.758	16.911.017	20.122.741	40,3%	26,1%	66.753.905	45.845.918	51.931.070	46,7%	45,6%
2 United States	62.030.855	81.007.591	63.655.893	16,5%	-23,4%	4.728.953	5.152.753	5.417.706	8,9%	-8,2%	4.200.810	4.403.980	4.729.932	2,9%	-4,6%
3 Italy	47.781.763	73.728.582	77.327.610	12,7%	-35,2%	8.477.102	8.724.913	10.877.205	16,0%	-2,8%	28.674.813	29.494.412	36.748.388	20,0%	-2,8%
4 Vietnam	17.899.321	23.718.327	32.685.012	4,8%	-24,5%	3.633.630	3.741.599	7.526.862	6,9%	-2,9%	8.824.628	8.830.636	16.898.003	6,2%	-0,1%
5 Mexico	16.712.398	14.145.854	13.970.080	4,5%	18,1%	1.537.832	889.665	908.517	2,9%	72,9%	2.048.548	915.313	872.405	1,4%	123,8%
6 South Korea	16.341.713	9.417.481	10.297.275	4,4%	73,5%	1.578.526	921.858	970.070	3,0%	71,2%	1.959.327	1.941.968	1.184.499	1,4%	0,9%
7 Thailand	14.948.572	15.833.112	12.124.558	4,0%	-5,6%	1.570.133	1.114.980	1.200.073	3,0%	40,8%	2.994.937	1.520.308	2.316.694	2,1%	97,0%
8 Germany	11.518.550	18.411.139	18.733.644	3,1%	-37,4%	854.934	1.229.962	1.718.479	1,6%	-30,5%	731.456	1.018.027	1.533.470	0,5%	-28,1%
Hong Kong	9.752.327	24.580.172	17.159.010	2,6%	-60,3%	2.075.141	2.835.035	2.313.997	3,9%	-20,8%	5.507.991	6.990.336	6.373.148	3,8%	-21,2%
9 Hungary	6.606.062	8.655.004	10.556.961	1,8%	-23,7%	518.517	595.511	870.888	1,0%	-12,9%	451.287	551.721	786.813	0,3%	-18,2%
10 Taiwan	4.959.891	6.504.004	7.813.687	1,3%	-23,7%	1.170.692	1.611.722	2.825.419	2,2%	-27,4%	3.490.714	3.780.499	7.362.232	2,4%	-7,7%
11 Argentina	4.523.546	3.226.886	1.843.421	1,2%	40,2%	295.124	259.204	190.123	0,6%	13,9%	350.561	247.710	177.458	0,2%	41,5%
12 Netherlands	3.566.781	4.656.986	3.505.903	1,0%	-23,4%	368.381	375.029	348.510	0,7%	-1,8%	359.318	341.266	325.822	0,3%	5,3%
13 Tunisia	3.539.324	2.940.719	3.637.344	0,9%	20,4%	230.218	196.916	248.998	0,4%	16,9%	345.287	303.171	386.961	0,2%	13,9%
14 Uruguay	3.368.181	2.129.902	3.222.339	0,9%	58,1%	387.067	340.860	530.034	0,7%	13,6%	1.420.096	1.170.764	1.719.904	1,0%	21,3%
15 Norway	3.003.421	2.629.323	4.452.012	0,8%	14,2%	204.175	143.853	318.735	0,4%	41,9%	145.250	105.030	240.404	0,1%	38,3%
16 Slovakia	2.967.487	950.632	233.903	0,8%	212,2%	182.712	47.316	21.198	0,3%	286,2%	185.375	64.106	13.368	0,1%	189,2%
17 Spain	2.964.474	1.763.676	3.588.473	0,8%	68,1%	819.824	602.555	1.575.434	1,5%	36,1%	2.386.755	1.625.385	4.304.979	1,7%	46,8%
18 Poland	2.280.128	3.472.708	2.122.668	0,6%	-34,3%	210.502	300.680	213.191	0,4%	-30,0%	171.003	250.429	166.829	0,1%	-31,7%
19 Indonesia	2.278.377	5.590.119	4.836.310	0,6%	-59,2%	286.161	439.189	589.729	0,5%	-34,8%	214.450	340.514	447.327	0,1%	-37,0%
20 India	2.198.563	4.277.644	4.134.765	0,6%	-48,6%	401.300	387.415	580.037	0,8%	3,6%	1.243.421	1.448.457	1.575.402	0,9%	-14,2%
21 Malaysia	1.903.986	1.947.443	2.661.909	0,5%	-2,2%	151.117	134.057	220.418	0,3%	12,7%	120.899	111.896	168.844	0,1%	8,0%
22 Turkey	1.753.387	87.116	27.839	0,5%	1912,7%	62.106	11.778	751	0,1%	427,3%	3.582.070	9.904	524	2,5%	36067,9%
23 South Africa	1.615.518	1.317.238	1.445.401	0,4%	22,6%	158.484	160.317	193.725	0,3%	-1,1%	268.088	158.952	404.444	0,2%	68,7%
24 Portugal	1.568.161	1.423.262	1.900.197	0,4%	10,2%	153.891	125.016	234.125	0,3%	23,1%	413.636	300.980	383.218	0,3%	37,4%
25 France	1.415.228	1.561.328	378.164	0,4%	-9,4%	65.038	60.289	18.213	0,1%	7,9%	91.732	97.749	29.034	0,1%	-6,2%
26 Canada	1.285.498	1.296.454	1.640.681	0,3%	-0,8%	78.829	76.505	112.076	0,1%	3,0%	70.662	72.137	97.403	0,05%	-2,0%
27 Japan	1.122.461	892.696	691.986	0,3%	25,7%	89.023	63.628	158.207	0,2%	39,9%	155.816	149.815	453.424	0,1%	4,0%
28 Cambodia	1.060.520	757.800	679.055	0,3%	39,9%	104.078	33.795	127.959	0,2%	208,0%	452.483	35.222	315.109	0,3%	1184,7%
29 Chile	1.058.208	2.922.140	1.662.317	0,3%	-63,8%	149.870	324.938	206.637	0,3%	-53,9%	182.257	407.803	222.148	0,1%	-55,3%
30 Switzerland	1.025.859	1.265.533	1.227.225	0,3%	-18,9%	249.786	394.158	384.472	0,5%	-36,6%	1.046.350	1.501.544	1.030.420	0,7%	-30,3%
Others (2023: +41 countries)	9.968.752	9.122.881	8.934.407	2,7%	9,3%	820.993	774.257	920.446	1,6%	6,0%	4.228.293	1.883.249	3.711.572	3,0%	124,5%
Total	375.089.201	442.368.954	441.249.969		-15,2%	52.932.897	48.980.770	61.944.975		8,1%	143.072.218	115.919.201	146.911.248		23,4%

Source: MDIC/SECEX - Prepared by: CIBC

■ ANALYSIS OF DESTINATIONS

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

- China (without HK) has a share in value of 29.9% (previous 29.3%) and 40.3% (39.5%) in area, with a monetary reduction of 0.1% (-2.6%), but an increase of 26.1% (+18.1%) in area.

- United States with a share of 16.5% (17.5%) in value, and with 8.9% (9.5%) in area, shows decreases of 23.4% (-20.9%) in value and 8.2% (-4.7%) in area.

- Italy with a share of 12.7% (13.7%) in value, and 16.0% (17.3%) in area, with drops of 35.2% (-28.7%) in value and 2.8% (+7.3%) in area.

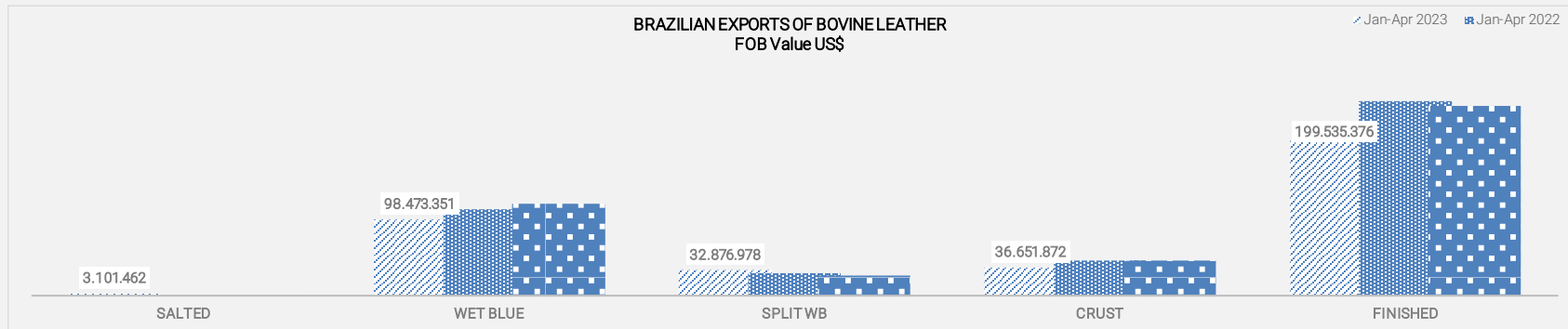
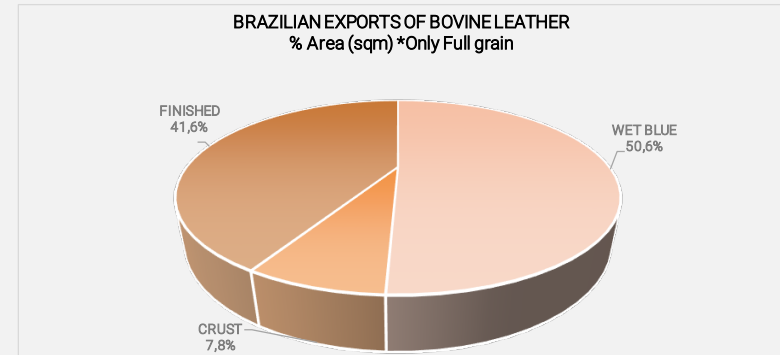
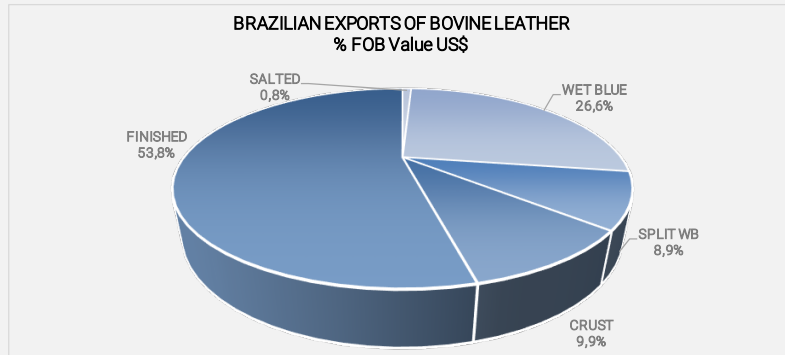
The sharp declines in values exported to the United States and Italy contrast with the significant recovery of shipments to China, which has now reached monetary stability and a significant increase in volume, with +26.1% in area and +45.6% by weight.

Among the TOP10, the most expressive growth in values is in shipments to South Korea (+73.5%), with Mexico being the highlight in volumes (+72.9%).

BRAZILIAN EXPORTS OF BOVINE LEATHER BY TYPE

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Apr 2023	Jan-Apr 2022	Jan-Apr 2021	2023/2022	2023/2021	Jan-Apr 2023	Jan-Apr 2022	Jan-Apr 2021	2023/2022	2023/2021	Jan-Apr 2023	Jan-Apr 2022	Jan-Apr 2021	2023/2022	2023/2021
SALTED	3.101.462	863.624	962.729	259,1%	222,2%	-	-	-	-	-	6.683.233	1.306.381	2.805.422	411,6%	138,2%
WET BLUE	98.473.351	111.358.820	118.356.217	-11,6%	-16,8%	20.281.880	14.229.633	17.149.045	42,5%	18,3%	81.781.803	58.453.308	71.695.596	39,9%	14,1%
SPLIT WB	32.876.978	28.665.631	26.466.158	14,7%	24,2%	12.763.966	13.371.741	16.778.278	-4,5%	-23,9%	36.501.420	36.829.486	47.254.450	-0,9%	-22,8%
CRUST	36.651.872	45.159.859	45.765.919	-18,8%	-19,9%	3.121.124	3.336.308	4.464.862	-6,4%	-30,1%	3.184.647	3.310.181	4.233.724	-3,8%	-24,8%
FINISHED	199.535.376	250.729.497	244.979.363	-20,4%	-18,6%	16.647.715	17.894.163	23.365.451	-7,0%	-28,8%	14.585.453	15.628.788	20.529.951	-6,7%	-29,0%
Total	370.639.039	436.777.431	436.530.386	-15,1%	-15,1%	52.814.685	48.831.845	61.757.636	8,2%	-14,5%	142.736.556	115.528.144	146.519.143	23,6%	-2,6%

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 in the first four months of the year, compared to the same period in 2022:

- Wet Blue with a reduction in value of 11.6% (-11.3%), but an increase of 42.5% (+46.9%) in area.
- Split WB up 14.7% (+4.6%) in value, but still down 4.5% (-15.0%) in area.
- Crust with drops of 18.8% (-17.5%) in value, and 6.4% (-5.3%) in area.
- Finished leather decreasing 20.4% (-21.4%) in value and 7.0% (-9.1%) in area.

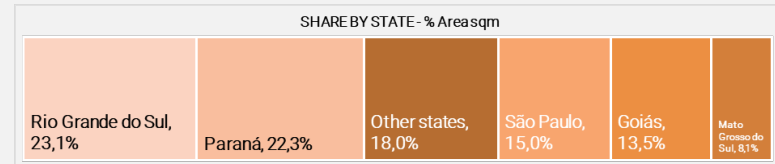
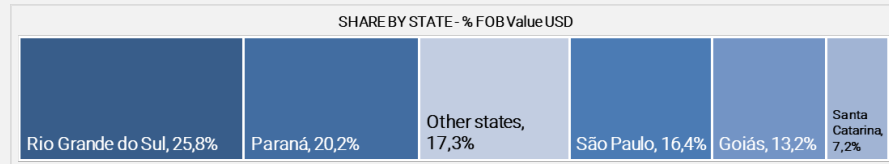
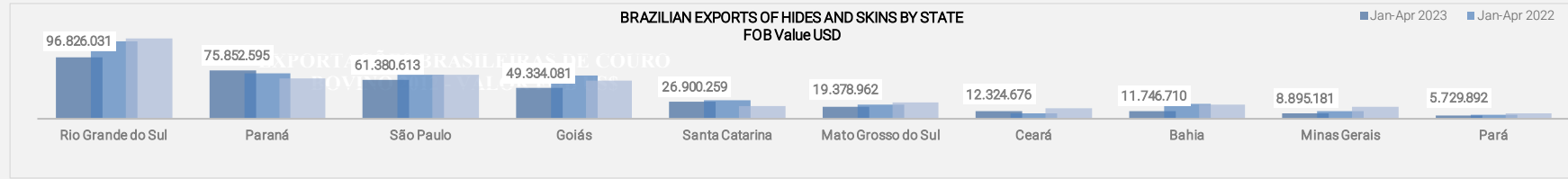
Once again, we had a month with a considerable increase in the area shipped of wet blue, but the most significant growth occurred in splits, both in terms of value and volume. After three months with drops in the shipped area, the month of April reached a 35.8% increase over the same month last year. With that, we now have an accumulated index of 14.7% above in value and an approximation of stability in area, with -4.5%.

The salted bovine hides continue with shipments on the rise, reaching, in just four months, more than half of the value and volume of 2022.

EXPORTS OF HIDES AND SKINS BY STATE

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-Apr 2023	Jan-Apr 2022	Jan-Apr 2021	2023	2023/2022		Jan-Apr 2023	Jan-Apr 2022	Jan-Apr 2021	2023	2023/2022		Jan-Apr 2023	Jan-Apr 2022	Jan-Apr 2021	2023	2023/2022	
1 Rio Grande do Sul	96.826.031	122.336.906	127.058.941	25,8%	-20,9%	12.241.788	13.244.803	17.175.404	23,1%	-7,6%	28.006.699	25.621.529	31.990.995	19,6%	9,3%			
2 Paraná	75.852.595	71.420.220	63.415.379	20,2%	6,2%	11.821.883	8.914.124	9.462.413	22,3%	32,6%	33.939.569	23.182.051	24.430.312	23,7%	46,4%			
3 São Paulo	61.380.613	69.999.900	69.873.481	16,4%	-12,3%	7.947.660	6.802.784	9.338.622	15,0%	16,8%	17.294.976	11.762.605	19.481.064	12,1%	47,0%			
4 Goiás	49.334.081	68.355.627	60.557.867	13,2%	-27,8%	7.120.153	7.960.713	8.331.478	13,5%	-10,6%	22.578.591	22.716.655	23.120.482	15,8%	-0,6%			
5 Santa Catarina	26.900.259	29.293.980	19.890.984	7,2%	-8,2%	3.059.496	3.020.491	3.026.669	5,8%	1,3%	6.081.401	7.794.935	7.737.117	4,3%	-22,0%			
6 Mato Grosso do Sul	19.378.962	22.229.397	25.637.350	5,2%	-12,8%	4.299.521	3.078.609	3.981.901	8,1%	39,7%	15.547.264	11.110.244	14.809.523	10,9%	39,9%			
7 Ceará	12.324.676	9.052.397	16.997.930	3,3%	36,1%	1.057.133	642.507	1.731.712	2,0%	64,5%	1.498.897	895.523	2.298.363	1,0%	67,4%			
8 Bahia	11.746.710	23.095.906	22.781.631	3,1%	-49,1%	1.804.684	2.286.658	3.482.912	3,4%	-21,1%	3.356.144	3.651.383	7.086.019	2,3%	-8,1%			
9 Minas Gerais	8.895.181	12.207.261	18.958.029	2,4%	-27,1%	1.666.122	1.515.909	3.428.488	3,1%	9,9%	3.777.261	2.249.587	5.607.698	2,6%	67,9%			
10 Pará	5.729.892	6.105.209	8.978.437	1,5%	-6,1%	1.183.340	808.125	1.217.307	2,2%	46,4%	5.760.773	3.836.288	5.743.529	4,0%	50,2%			
11 Mato Grosso	2.096.922	3.783.758	2.985.034	0,6%	-44,6%	438.319	470.976	472.816	0,8%	-6,9%	1.508.480	1.887.342	1.919.556	1,1%	-20,1%			
12 Rio de Janeiro	1.899.376	1.809.094	1.210.843	0,5%	5,0%	40.541	41.463	12.598	0,8%	-2,2%	71.150	28.408	5.759	0,05%	150,5%			
13 Pernambuco	690.588	336.031	374.485	0,2%	105,5%	24.811	17.487	10.908	0,05%	41,9%	1.062.306	199.862	1.158.836	0,7%	431,5%			
14 Rio Grande do Norte	684.391	40.239	95.398	0,2%	1600,8%	0	0	0	0,0%	-	1.641.100	81.500	115.560	1,1%	1913,6%			
15 Tocantins	499.840	0	0	0,1%	-	119.360	0	0	0,2%	-	572.520	0	0	0,4%	-			
16 Piauí	473.907	1.135.680	983.195	0,1%	-58,3%	24.429	65.854	91.499	0,05%	-62,9%	14.786	37.110	54.745	0,01%	-60,2%			
17 Distrito Federal	277.691	98.473	891.040	0,1%	182,0%	56.881	17.600	121.248	0,1%	223,2%	299.155	85.570	575.932	0,2%	249,6%			
18 Maranhão	89.742	76.418	0	0,02%	17,4%	26.696	10.981	0	0,1%	143,1%	61.097	9.453	0	0,04%	546,3%			
19 Espírito Santo	7.744	12.544	3.166	0,002%	-38,3%	80	113	29	0,000%	-29,2%	49	62	13	0,000%	-21,0%			
20 Amapá	0	290.997	141.510	0,0%	-100,0%	0	0	0	0,0%	-	0	350.508	315.640	0,0%	-100,0%			
21 Amazonas	0	687.552	415.269	0,0%	-100,0%	0	81.507	58.971	0,0%	-100,0%	0	418.552	460.111	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%			
Total	375.089.201	442.368.954	441.249.969	100,0%	-15,2%	52.932.897	48.980.770	61.944.975	100,0%	8,1%	143.072.218	115.919.201	146.911.248	100,0%	23,4%			

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 four months of the year, the following highlights:

- Considering the top ten exporters, we now have growth in value in only two states, with Ceará still being the biggest highlight, with +36.1%. The biggest falls are in the states of Bahia (-49.1%), Goiás (-27.8%) and Minas Gerais (-27.1%).

- Regarding the commercialized area of the TOP10, we have three states still with negative indices in area, with the most significant drop in Bahia (-21.1%), followed by Goiás (-10.6%) and Rio Grande do Sul (-7.6%). The biggest growth is in Ceará, with +64.5%.

- Despite this drop, Rio Grande do Sul regained leadership in area, now showing a 23.1% share, compared to 22.3% for Paraná. In terms of weight, Paraná remains the leader (23.7% share).

■ CLOSING REMARKS

Despite the drop in total export values in April, we had a positive month in volumes shipped abroad, with growth in area of 16.5%, and in weight of 26.5%, always compared to the same month of 2022. Considering the total weight exported by the sector is the fourth consecutive month of the year with an increase over the corresponding month of last year, which leads to an accumulated index of +23.4%. A similar situation exists in terms of area shipped abroad, which despite the 7.3% drop in February, the index accumulated in the four-month period is +8.1%.

Considering the ten main markets, we have three important destinations with accumulated growth in area, which are Mexico, South Korea, and Thailand. However, these three markets have participation around 3% each in total. Meanwhile, China, with a 40.3% share in area and growth of 26.1% over the first four months of 2022, is undoubtedly the main responsible for the positive results in this index.

Data released by China show that the country's GDP grew 4.5% in the first quarter, surpassing expectations. Despite this, the numbers indicate that the country's economy has not yet returned to previous levels of the pandemic, with falls in profits in the automobile industry, reduction in investments in the real estate sector and in the production of the leather industry and manufactured products. With that, there are still doubts regarding the ability to maintain the evolution in the remainder of the year. -