



BRAZILIAN EXPORTS OF HIDES AND SKINS

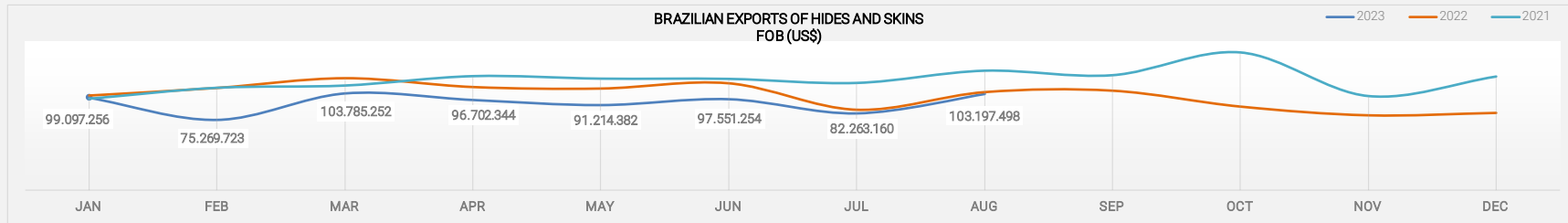
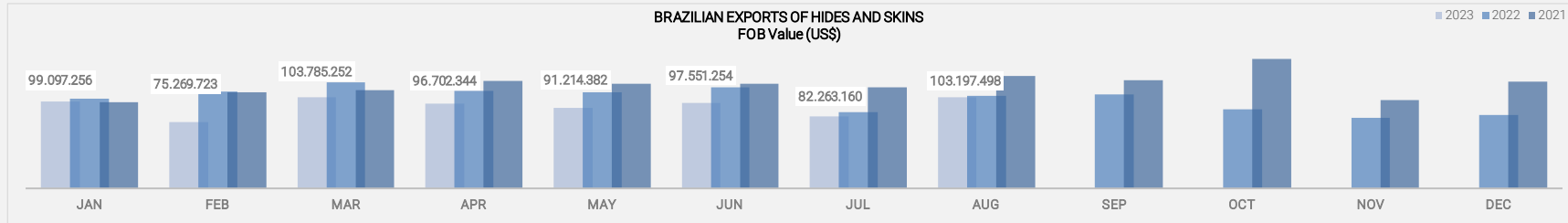
August 2023

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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	82.263.160	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	25,4%	-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		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	749.080.869	1.218.838.305	1.414.447.447		-12,7%	-18,8%	104.347.104	140.749.731	172.306.969		10,4%	-12,9%	278.879.081	354.537.869	395.578.583		22,6%	2,3%

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 August 2023, registered a value of US\$ 103.2 million, representing significant increase of 25.4% over the previous month, but a slight drop of 2.0% compared to the same month last year, when US\$105.3 million were exported.

Considering volumes, 14.6 million square meters and 40.9 thousand tons were exported, which meant, respectively, increases of 18.1% and 26.9% over the same month in 2022. Compared to July, the increases were even greater, with +31.7% in area and +38.4% in weight.

The eight-month period of the year totaled US\$749.1 million, 12.7% below the same period in 2022, but increases of 10.4% in area and 22.6% in weight.

BRAZILIAN EXPORTS OF HIDES AND SKINS BY DESTINATION

COUNTRIES	FOB VALUE (US\$)				Share 2023/2022	Δ	AREA (sqm)			Share 2023/2022	Δ	WEIGHT (KG)			Share 2023/2022	Δ
	Jan-Aug 2023	Jan-Aug 2022	Jan-Aug 2021	2023			Jan-Aug 2023	Jan-Aug 2022	Jan-Aug 2021			2023	Jan-Aug 2023	Jan-Aug 2022		
1 China + Hong Kong	231.611.881	240.859.166	316.729.557	30,9%	-3,8%	44.044.490	34.593.251	47.386.334	42,2%	27,3%	133.019.239	93.563.771	124.304.455	47,7%	42,2%	
China	208.081.976	196.333.928	274.970.412	27,8%	6,0%	39.570.609	29.380.720	42.561.676	37,9%	34,7%	121.579.211	80.436.302	111.513.762	43,6%	51,1%	
2 United States	126.468.163	162.215.596	136.021.652	16,9%	-22,0%	9.562.464	10.528.011	11.046.905	9,2%	-9,2%	8.449.028	9.062.922	9.472.800	3,0%	-6,8%	
3 Italy	91.770.091	145.016.641	129.466.781	12,3%	-36,7%	15.755.238	17.627.302	18.224.685	15,1%	-10,6%	50.879.589	58.899.601	54.165.628	18,2%	-13,6%	
4 Vietnam	44.009.469	45.618.750	69.220.804	5,9%	-3,5%	8.734.655	7.900.968	13.310.417	8,4%	10,6%	21.031.282	19.052.223	29.736.980	7,5%	10,4%	
5 Mexico	35.396.783	16.658.393	27.023.906	4,7%	112,5%	3.352.826	1.607.116	2.451.948	3,2%	108,6%	4.074.419	3.544.210	3.483.575	1,5%	15,0%	
6 South Korea	33.625.998	29.944.603	33.360.831	4,5%	12,3%	3.231.841	1.800.775	2.066.162	3,1%	79,5%	4.520.127	1.752.357	1.864.644	1,6%	157,9%	
7 Thailand	27.694.779	31.224.976	26.007.695	3,7%	-11,3%	2.866.214	2.223.589	2.372.679	2,7%	28,9%	4.852.833	3.795.570	4.214.067	1,7%	27,9%	
Hong Kong	23.529.905	44.525.238	41.759.145	3,1%	-47,2%	4.473.881	5.212.531	4.824.658	4,3%	-14,2%	11.440.028	13.127.469	12.790.693	4,1%	-12,9%	
8 Germany	21.920.923	35.911.413	34.797.709	2,9%	-39,0%	1.684.118	2.457.028	3.009.268	1,6%	-31,5%	1.427.908	2.033.666	2.760.026	0,5%	-29,8%	
9 Hungary	13.887.651	15.738.920	18.796.886	1,9%	-11,8%	1.123.291	1.059.884	1.482.391	1,1%	6,0%	968.606	978.478	1.364.139	0,3%	-1,0%	
10 Taiwan	10.957.904	13.021.508	15.308.901	1,5%	-15,8%	2.665.247	3.303.765	4.898.324	2,6%	-19,3%	7.539.084	8.336.889	12.533.245	2,7%	-9,6%	
11 Tunisia	8.325.273	6.295.889	7.196.714	1,1%	32,2%	527.280	389.888	480.407	0,5%	35,2%	812.037	614.333	750.873	0,3%	32,2%	
12 Uruguay	8.020.465	4.940.403	6.451.363	1,1%	62,3%	962.538	711.731	1.001.930	0,9%	35,2%	3.064.097	2.722.820	3.245.941	1,1%	12,5%	
13 Argentina	7.435.277	7.820.934	4.763.264	1,0%	-4,9%	546.511	595.186	518.786	0,5%	-8,2%	642.529	614.755	476.027	0,2%	4,5%	
14 Netherlands	7.202.192	8.313.907	8.562.685	1,0%	-13,4%	722.605	680.823	754.701	0,7%	6,1%	701.150	636.254	716.757	0,3%	10,2%	
15 Spain	5.983.343	3.042.456	5.153.418	0,8%	96,7%	1.548.245	983.446	2.265.926	1,5%	57,4%	4.443.659	2.792.239	6.242.026	1,6%	59,1%	
16 Norway	5.792.348	9.481.768	8.908.615	0,8%	-38,9%	403.410	544.761	581.426	0,4%	-25,9%	283.661	385.398	432.371	0,1%	-26,4%	
17 Slovakia	5.554.095	2.027.239	272.571	0,7%	174,0%	354.290	98.010	23.417	0,3%	261,5%	345.773	135.611	16.750	0,1%	155,0%	
18 India	5.481.318	10.045.505	6.791.753	0,7%	-45,4%	1.196.588	1.152.077	853.757	1,1%	3,9%	3.964.045	3.942.492	2.268.679	1,4%	0,5%	
19 Turkey	4.400.447	815.826	155.833	0,6%	439,4%	62.106	24.950	10.048	0,1%	148,9%	9.500.500	1.280.768	90.263	3,4%	641,8%	
20 Poland	4.095.223	6.282.367	4.829.989	0,5%	-34,8%	374.342	557.397	469.236	0,4%	-32,8%	307.269	463.424	370.372	0,1%	-33,7%	
21 Portugal	3.289.285	2.929.169	4.386.150	0,4%	12,3%	309.395	263.982	454.265	0,3%	17,2%	752.924	603.642	758.097	0,3%	24,7%	
22 France	3.207.176	3.636.718	1.036.928	0,4%	-11,8%	136.266	143.163	49.040	0,1%	-4,8%	203.024	228.134	77.016	0,1%	-11,0%	
23 Malaysia	3.103.450	5.468.896	5.077.969	0,4%	-43,3%	236.564	361.167	400.345	0,2%	-34,5%	186.964	294.368	316.616	0,1%	-36,5%	
24 Canada	3.062.586	3.202.421	3.447.285	0,4%	-4,4%	186.235	187.140	225.749	0,2%	-0,5%	167.275	178.235	198.206	0,1%	-6,1%	
25 Switzerland	3.043.615	2.270.085	5.183.426	0,4%	34,1%	699.204	689.970	1.072.246	0,7%	1,3%	2.550.988	2.662.151	2.643.733	0,9%	-4,2%	
26 Japan	2.818.066	1.959.810	1.145.225	0,4%	43,8%	241.819	137.988	196.656	0,2%	75,2%	341.036	295.787	557.998	0,1%	15,3%	
27 South Africa	2.798.048	2.470.579	4.719.873	0,4%	13,3%	288.153	291.508	515.645	0,3%	-1,2%	427.157	325.020	900.211	0,2%	31,4%	
28 Indonesia	2.627.219	14.785.504	10.951.774	0,4%	-82,2%	331.005	1.259.266	1.101.461	0,3%	-73,7%	250.068	987.716	1.030.383	0,1%	-74,7%	
29 Chile	2.494.649	4.066.678	3.340.946	0,3%	-38,7%	310.232	449.251	393.793	0,3%	-30,9%	371.803	547.666	443.925	0,1%	-32,1%	
30 Cambodia	2.251.775	1.325.111	1.400.269	0,3%	69,9%	182.698	53.260	230.365	0,2%	243,0%	1.376.669	57.634	569.038	0,5%	2288,6%	
Others (2023: +44 countries)	20.751.377	20.737.729	21.491.106	2,8%	0,1%	1.707.234	1.808.412	1.956.134	1,6%	-5,6%	11.424.338	6.728.079	6.582.712	4,1%	69,8%	
Total	749.080.869	858.128.960	922.001.878		-12,7%	104.347.104	94.485.065	119.804.446		10,4%	278.879.081	227.516.213	272.587.553		22,6%	

Source: MDIC/SECEX - Prepared by: CIBC

■ ANALYSIS OF DESTINATIONS

The three main destinations for Brazilian leather show the following information in the period:

- China (without HK) has a share in value of 27.8% (previously 28.0%) and 37.9% (38.0%) in area, with a monetary increase of 6.0% (+4, 1%) and area of 34.7% (+33.1%).
- United States with a share of 16.9% (+16.5%) in value, and with 9.2% (8.9%) in area, shows drops of 22.0% (-24.9%) in value and 9.2% (-2.5%) in area.
- Italy with a share of 12.3% (12.0%) in value, and with 15.1% (14.6%) in area, with drops of 36.7% (-38.8%) in value and 10.6% (-12.4%) in area.

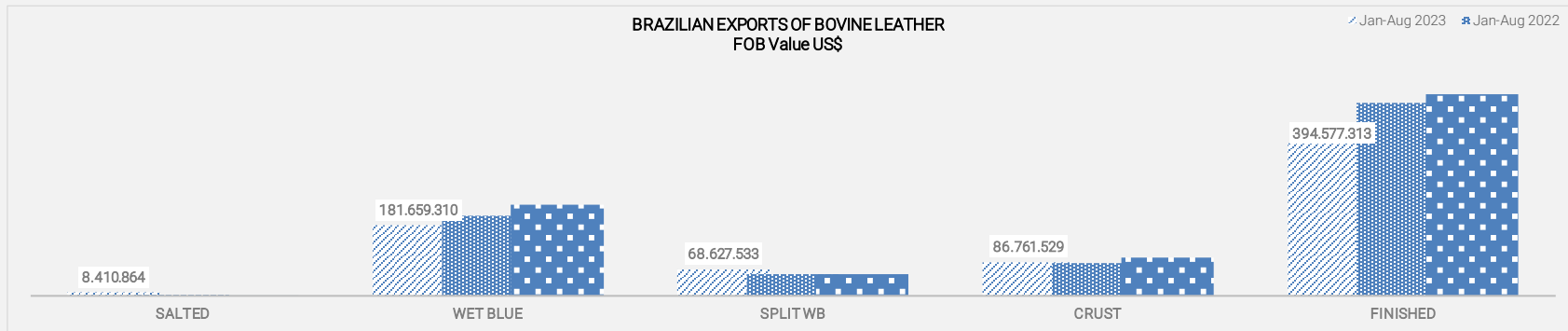
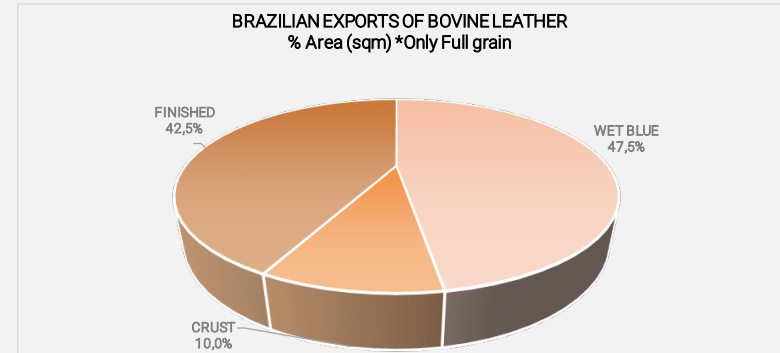
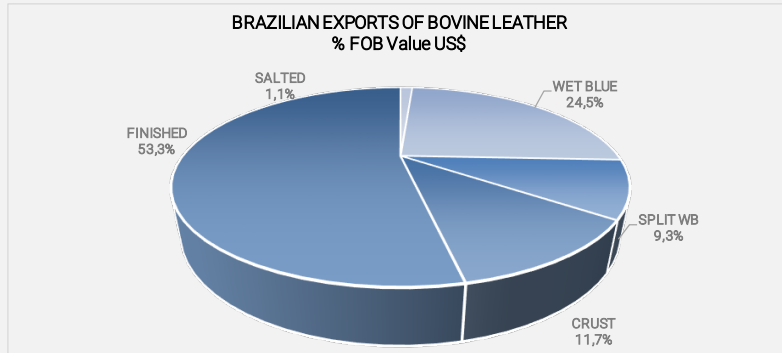
The movement of exports this month of August showed that two of the main destinations, the United States and Italy, increased their participation in the total. China, despite reducing its share, remained the only destination among the three main destinations to maintain positive indexes in the annual comparison.

Among the other countries in the TOP10, the biggest drops in values in the year are in Hong Kong (-47.2%) and Germany (-39.0%). In area, Germany also appears with -31.5%, followed by Taiwan, with -19.3%.

3 BRAZILIAN EXPORTS OF BOVINE LEATHER BY TYPE

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Aug 2023	Jan-Aug 2022	Jan-Aug 2021	2023/2022	2023/2021	Jan-Aug 2023	Jan-Aug 2022	Jan-Aug 2021	2023/2022	2023/2021	Jan-Aug 2023	Jan-Aug 2022	Jan-Aug 2021	2023/2022	2023/2021
SALTED	8.410.864	3.629.723	1.914.123	131,7%	339,4%	-	-	-	-	-	19.379.304	6.335.945	4.501.120	205,9%	330,5%
WET BLUE	181.659.310	206.042.493	235.926.127	-11,8%	-23,0%	36.969.800	27.521.054	32.220.665	34,3%	14,7%	147.767.396	114.753.617	127.397.190	28,8%	16,0%
SPLIT WB	68.627.533	55.292.695	55.683.642	24,1%	23,2%	26.201.671	24.618.851	32.475.275	6,4%	-19,3%	74.441.530	68.065.861	91.208.259	9,4%	-18,4%
CRUST	86.761.529	85.565.462	99.275.031	1,4%	-12,6%	7.794.279	6.286.714	8.861.450	24,0%	-12,0%	7.635.999	6.453.969	8.327.518	18,3%	-8,3%
FINISHED	394.577.313	497.302.117	519.452.929	-20,7%	-24,0%	33.103.867	35.802.623	45.915.494	-7,5%	-27,9%	28.957.688	31.232.520	40.251.899	-7,3%	-28,1%
Total	740.036.549	847.832.490	912.251.852	-12,7%	-18,9%	104.069.617	94.229.242	119.472.884	10,4%	-12,9%	278.181.917	226.841.912	271.685.986	22,6%	2,4%

Source: MDIC/SECEX - Prepared by: CIOB



■ ANALYSIS OF EXPORTS BY TYPE OF LEATHER

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

- Wet blue with a reduction in value of 11.8% (-13.9%), but an increase of 34.3% (+34.1%) in area.
- WB Split with increases of 24.1% (+25.3%) in value, and 6.4% (+6.9%) in area.
- Crust now has an increase of 1.4% (-4.5%) in value, and 24.0% (+14.6%) in area.
- Finished decreasing 20.7% (-21.5%) in value and 7.5% (-8.4%) in area.

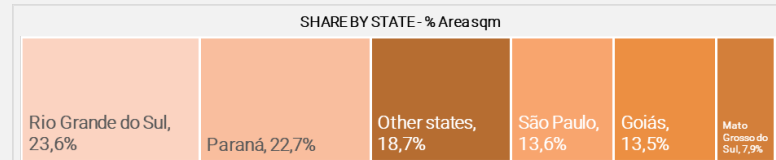
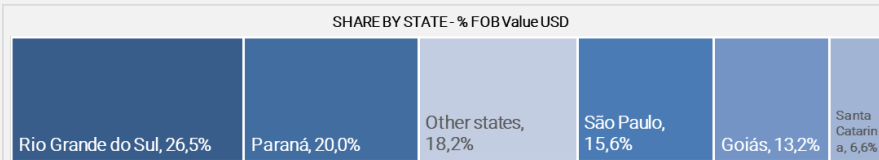
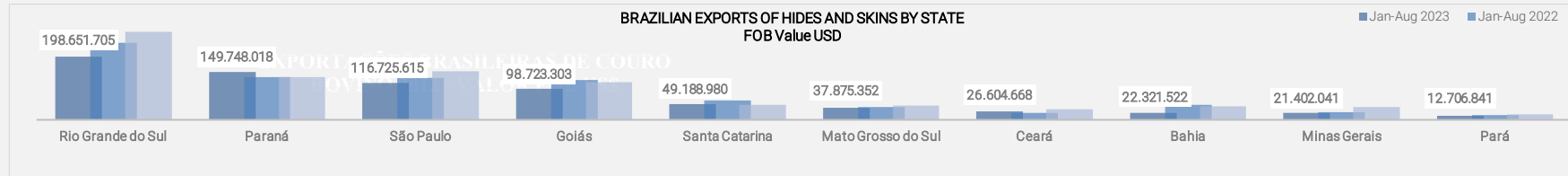
Wet blue exports this month of August exceeded the value by 74.5%, and the area by 83.4%, compared to the previous month. The value even marked the second consecutive month with an increase over the same month last year.

It is also important to note the increase in finished leather exports over the previous month, with +23.6% in value and +30.4% in area.

EXPORTS OF HIDES AND SKINS BY STATE

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-Aug 2023	Jan-Aug 2022	Jan-Aug 2021	2023	2023/2022		Jan-Aug 2023	Jan-Aug 2022	Jan-Aug 2021	2023	2023/2022		Jan-Aug 2023	Jan-Aug 2022	Jan-Aug 2021	2023	2023/2022	
1 Rio Grande do Sul	198.651.705	242.928.985	275.948.775	26,5%	-18,2%	24.658.725	25.159.452	35.426.262	23,6%	-2,0%	54.995.989	47.292.809	61.709.634	19,7%	16,3%			
2 Paraná	149.748.018	134.105.708	133.473.204	20,0%	11,7%	23.677.194	16.951.745	17.992.518	22,7%	39,7%	65.663.055	43.195.780	45.500.408	23,5%	52,0%			
3 São Paulo	116.725.615	132.148.441	152.708.698	15,6%	-11,7%	14.207.835	12.914.900	18.488.005	13,6%	10,0%	30.070.566	24.353.201	36.830.441	10,8%	23,5%			
4 Goiás	98.723.303	126.078.616	119.031.575	13,2%	-21,7%	14.111.623	14.278.133	15.404.316	13,5%	-1,2%	41.867.871	39.912.320	42.966.918	15,0%	4,9%			
5 Santa Catarina	49.188.980	61.021.358	46.742.494	6,6%	-19,4%	5.749.028	6.545.917	6.299.237	5,5%	-12,2%	11.305.045	18.459.086	16.512.303	4,1%	-38,8%			
6 Mato Grosso do Sul	37.875.352	40.996.225	45.967.494	5,1%	-7,6%	8.220.216	5.767.320	6.672.018	7,9%	42,5%	28.407.982	21.173.426	24.121.285	10,2%	34,2%			
7 Ceará	26.604.668	21.229.378	33.255.172	3,6%	25,3%	2.434.125	1.385.900	3.328.232	2,3%	75,6%	3.556.400	1.596.195	4.379.253	1,3%	122,8%			
8 Bahia	22.321.522	46.807.039	43.236.661	3,0%	-52,3%	3.285.685	5.405.580	5.971.346	3,1%	-39,2%	6.055.825	8.944.048	11.686.443	2,2%	-32,3%			
9 Minas Gerais	21.402.041	24.478.712	39.465.077	2,9%	-12,6%	3.906.138	3.059.933	6.628.042	2,7%	27,7%	7.936.973	5.255.537	11.603.441	2,8%	51,0%			
10 Pará	12.706.841	14.256.932	17.799.815	1,7%	-10,9%	2.646.451	2.013.003	2.233.906	2,5%	31,5%	12.830.323	10.006.889	10.234.211	4,6%	28,2%			
11 Mato Grosso	3.881.706	5.388.357	6.210.841	0,5%	-28,0%	835.913	682.984	833.330	0,8%	22,4%	2.852.424	2.637.271	3.201.966	1,0%	8,2%			
12 Rio de Janeiro	3.463.480	3.244.931	2.963.833	0,5%	6,7%	111.116	57.291	55.060	0,1%	94,0%	261.739	35.600	57.915	0,1%	635,2%			
13 Rio Grande do Norte	2.594.588	1.146.413	110.398	0,3%	126,3%	0	0	0	0,0%	-	5.930.590	2.130.700	140.560	2,1%	178,3%			
14 Pernambuco	2.049.710	769.627	712.149	0,3%	166,3%	31.779	23.817	26.073	0,03%	33,4%	5.150.472	1.104.273	1.375.761	1,8%	366,4%			
15 Piauí	1.194.722	1.736.723	1.817.272	0,2%	-31,2%	61.417	96.950	154.069	0,1%	-36,7%	36.006	53.679	86.745	0,01%	-32,9%			
16 Tocantins	783.287	21.692	84.532	0,1%	3510,9%	177.857	4.750	8.902	0,2%	3644,4%	874.075	21.285	45.550	0,3%	4006,5%			
17 Distrito Federal	494.279	235.120	1.397.989	0,1%	110,2%	100.060	36.593	174.204	0,1%	173,4%	532.435	184.720	845.707	0,2%	188,2%			
18 Maranhão	293.237	136.070	114.039	0,04%	115,5%	63.087	18.577	29.815	0,1%	239,6%	153.490	14.612	43.510	0,1%	950,4%			
19 Amazonas	171.699	747.152	591.485	0,02%	-77,0%	31.682	82.011	78.914	0,03%	-61,4%	160.080	418.995	613.613	0,1%	-61,8%			
20 Rondônia	143.375	0	0	0,02%	-	37.068	0	0	0,0%	-	131.676	0	0	0,0%	-			
21 Paraíba	52.191	0	0	0,01%	-	0	0	0	0,0%	-	106.000	0	0	0,04%	-			
22 Espírito Santo	10.550	15.606	18.398	0,001%	-32,4%	105	143	181	0,000%	-26,6%	65	78	761	0,000%	-16,7%			
23 Amapá	0	634.510	350.874	0,0%	-100,0%	0	0	0	0,0%	-	0	725.675	631.800	0,0%	-100,0%			
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%			
Total	749.080.869	858.128.960	922.001.878	100,0%	-12,7%	104.347.104	94.485.065	119.804.446	100,0%	10,4%	278.879.081	227.516.213	272.587.553	100,0%	22,6%			

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 present, in these eight months, the following highlights:

- The states of Ceará and Paraná continue with positive indexes in values: +25.3% and +11.7%, respectively. The negative highlight continues to be Bahia, with -52.3%.
- Considering the traded area, the main growths are filed in Ceará (+75.6%), Mato Grosso do Sul (+42.5%) and Paraná (+39.7%). The biggest drop is also in Bahia, with -39.2%.
- Among the other states, Tocantins marked the biggest increase of the year, with +3510.9% in value and +3644.4% in area, expected to exceed US\$ 1 million by the end of the year in exports.
- The value and volume ranking continues without changes in positions, with Rio Grande do Sul in the lead (26.5% in value and 23.6% in area), followed by Paraná (20.0% in value and 22.7 % in area). São Paulo and Goiás are the others placed in the ranking of value (15.6% and 13.2%, respectively) and area (13.6% and 13.5%). Rio Grande do Sul is only surpassed by Paraná in weight.

■ CLOSING REMARKS

Despite all the challenges currently experienced by Brazilian tanneries in the international market, such as holidays on the European continent, global reductions in footwear production, in addition to the Chinese market still recovering and with low impetus in purchases, the Brazilian tanning sector showed its resilience in August.

Hide and skin exports recorded the best month of the year in export volume, with 14.6 million square meters and 40.9 thousand tons. In terms of values, August was only surpassed by March, when exports were 0.6% higher.

ACLE, in Shanghai, ended with positive impressions from Brazilian tanneries, but overall, for the market, the fair has not yet managed to give clear guidance to the world of leather on what the coming months will be like. –