

AUGUST 2024

# Brazilian exports of Hides and Skins

*Brazilian leather*



apexBrasil

MINISTÉRIO DO  
DESENVOLVIMENTO,  
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GOVERNO FEDERAL  
**BRASIL**  
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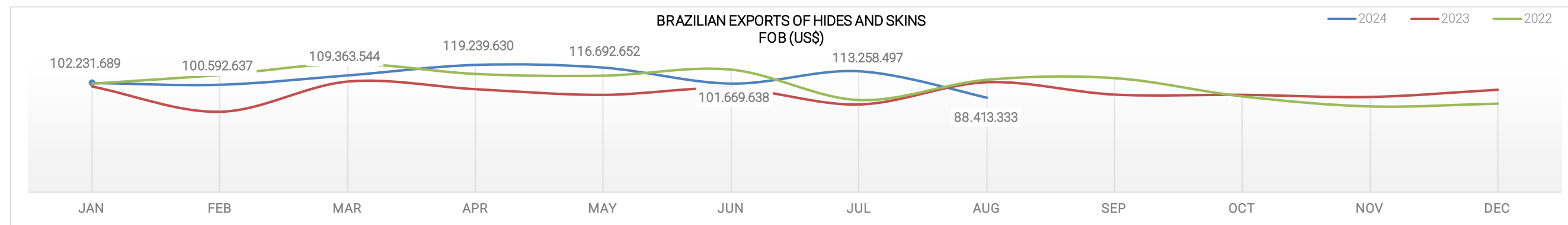
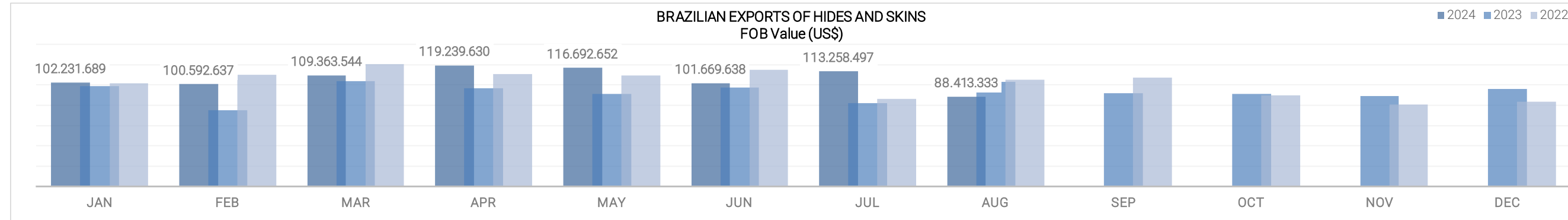
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MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022
JAN	102.231.689	99.097.256	101.697.054	6,4%	3,2%	0,5%	15.255.504	14.458.015	12.063.997	5,0%	5,5%	26,5%	42.745.080	40.842.514	30.527.897	2,9%	4,7%	40,0%
FEB	100.592.637	75.269.723	109.794.363	-1,6%	33,6%	-8,4%	14.792.606	10.666.731	11.518.363	-3,0%	38,7%	28,4%	46.844.191	29.776.931	25.501.700	9,6%	57,3%	83,7%
MAR	109.363.544	103.785.252	120.139.328	8,7%	5,4%	-9,0%	16.036.028	14.083.877	13.625.210	8,4%	13,9%	17,7%	48.622.942	36.974.204	31.859.528	3,8%	31,5%	52,6%
APR	119.239.630	96.588.085	110.738.209	9,0%	23,5%	7,7%	18.567.768	13.705.693	11.773.200	15,8%	35,5%	57,7%	57.611.541	35.449.787	28.030.076	18,5%	62,5%	105,5%
MAY	116.692.652	91.214.382	109.124.938	-2,1%	27,9%	6,9%	17.330.704	12.063.660	11.199.958	-6,7%	43,7%	54,7%	52.804.002	31.339.687	24.982.739	-8,3%	68,5%	111,4%
JUN	101.669.638	97.427.722	114.733.220	-12,9%	4,4%	-11,4%	15.753.543	13.607.331	12.737.959	-9,1%	15,8%	23,7%	48.917.036	34.008.351	32.538.087	-7,4%	43,8%	50,3%
JUL	113.258.497	82.168.631	86.582.958	11,4%	37,8%	30,8%	16.666.502	11.107.588	9.168.223	5,8%	50,0%	81,8%	46.791.505	29.554.021	21.825.224	-4,3%	58,3%	114,4%
AUG	88.413.333	103.150.225	105.318.890	-21,9%	-14,3%	-16,1%	13.039.334	14.634.581	12.398.155	-21,8%	-10,9%	5,2%	38.320.128	40.916.844	32.250.962	-18,1%	-6,3%	18,8%
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>851.461.620</b>	<b>1.116.751.780</b>	<b>1.218.838.305</b>		<b>13,7%</b>	<b>-0,8%</b>	<b>127.441.989</b>	<b>158.963.267</b>	<b>140.749.731</b>		<b>22,2%</b>	<b>34,9%</b>	<b>382.656.425</b>	<b>430.611.610</b>	<b>354.537.869</b>		<b>37,2%</b>	<b>68,2%</b>

Source: SECEX - Prepared by: CICB



## ■ ANALYSIS OF TOTAL EXPORTS

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Exports of hides and skins presented by SECEX (Foreign Trade Secretariat) of the Ministry of Development, Industry, Commerce and Services and analyzed by CICB, referring to the month of August 2024, registered a value of US\$ 88.4 million, representing drops of 21.9% compared to the previous month, and 14.3% compared to the same month last year, when US\$ 103.2 million were exported.

As for volume, 13.0 million square meters and 38.3 thousand tons were exported, which meant, respectively, reductions of 10.9% and 6.3% compared to the same month in 2023. Compared to July, there were also decreases of 21.8% in area and 18.1% in weight.

The period from January to August totaled US\$ 851.5 million, 13.7% above the same period in 2023, with increases also of 22.2% in area and 37.2% in weight.

BRAZILIAN EPORTS OF HIDES AND SKINS - DESTINATIONS

2024

COUNTRIES	FOB VALUE (US\$)			Share	Δ	AREA (sqm)			Share	Δ	WEIGHT (KG)			Share	Δ
	Jan-Aug 2024	Jan-Aug 2023	Jan-Aug 2022	2024	2024/2023	Jan-Aug 2024	Jan-Aug 2023	Jan-Aug 2022	2024	2024/2023	Jan-Aug 2024	Jan-Aug 2023	Jan-Aug 2022	2024	2024/2023
1 China + Hong Kong	279.894.837	231.233.323	240.859.166	32,9%	21,0%	55.368.964	44.024.952	34.593.251	43,4%	25,8%	176.159.247	133.002.615	93.563.771	46,0%	32,4%
China	262.372.867	207.703.418	196.333.928	30,8%	26,3%	52.131.624	39.551.071	29.380.720	40,9%	31,8%	167.093.866	121.562.587	80.436.302	43,7%	37,5%
2 United States	115.916.382	126.471.382	162.215.596	13,6%	-8,3%	8.846.362	9.562.374	10.528.011	6,9%	-7,5%	7.942.991	8.448.910	9.062.922	2,1%	-6,0%
3 Italy	98.525.880	91.765.478	145.016.641	11,6%	7,4%	16.575.155	15.755.238	17.627.302	13,0%	5,2%	52.390.532	50.879.589	58.899.601	13,7%	3,0%
4 Vietnam	88.433.648	44.007.938	45.618.750	10,4%	100,9%	17.797.248	8.734.655	7.900.968	14,0%	103,8%	42.757.273	21.031.282	19.052.223	11,2%	103,3%
5 Mexico	47.307.268	33.625.998	29.944.603	5,6%	40,7%	4.559.667	3.231.841	1.800.775	3,6%	41,1%	6.282.920	4.520.127	1.752.357	1,6%	39,0%
6 Thailand	28.798.392	27.696.371	31.224.976	3,4%	4,0%	3.598.991	2.866.214	2.223.589	2,8%	25,6%	9.209.743	4.852.833	3.795.570	2,4%	89,8%
7 Germany	22.307.952	21.920.923	35.911.413	2,6%	1,8%	1.836.268	1.684.118	2.457.028	1,4%	9,0%	1.560.254	1.427.908	2.033.666	0,4%	9,3%
Hong Kong	17.521.970	23.529.905	44.525.238	2,1%	-25,5%	3.237.340	4.473.881	5.212.531	2,5%	-27,6%	9.065.381	11.440.028	13.127.469	2,4%	-20,8%
8 Hungary	12.808.522	13.887.651	15.738.920	1,5%	-7,8%	1.123.934	1.123.291	1.059.884	0,9%	0,1%	938.242	968.606	978.478	0,2%	-3,1%
9 South Korea	10.920.476	35.396.783	16.658.393	1,3%	-69,1%	1.033.099	3.352.826	1.607.116	0,8%	-69,2%	1.124.443	4.074.419	3.544.210	0,3%	-72,4%
10 Taiwan	10.701.217	10.957.904	13.021.508	1,3%	-2,3%	2.195.574	2.665.247	3.303.765	1,7%	-17,6%	7.174.877	7.539.084	8.336.889	1,9%	-4,8%
11 Uruguai	10.088.776	8.020.465	4.940.403	1,2%	25,8%	1.283.750	962.538	711.731	1,0%	33,4%	4.739.859	3.064.097	2.722.820	1,2%	54,7%
12 Indonesia	9.823.026	2.627.219	14.785.504	1,2%	273,9%	1.629.707	331.005	1.259.266	1,3%	392,4%	2.884.470	250.068	987.716	0,8%	1053,5%
13 Slovakia	9.705.137	5.554.095	2.027.239	1,1%	74,7%	657.730	354.290	98.010	0,5%	85,6%	613.651	345.773	135.611	0,2%	77,5%
14 Tunisia	9.414.973	8.325.273	6.295.889	1,1%	13,1%	608.863	527.280	389.888	0,5%	15,5%	900.280	812.037	614.333	0,2%	10,9%
15 Norway	7.379.457	5.792.348	9.481.768	0,9%	27,4%	508.346	403.410	544.761	0,4%	26,0%	358.277	283.661	385.398	0,1%	26,3%
16 Switzerland	6.487.447	3.043.615	2.270.085	0,8%	113,1%	1.386.797	699.204	689.970	1,1%	98,3%	3.423.272	2.550.988	2.662.151	0,9%	34,2%
17 Spain	6.316.080	5.983.343	3.042.456	0,7%	5,6%	1.495.447	1.548.245	983.446	1,2%	-3,4%	3.919.093	4.443.659	2.792.239	1,0%	-11,8%
18 Netherlands	6.144.126	7.202.192	8.313.907	0,7%	-14,7%	614.356	722.605	680.823	0,5%	-15,0%	601.352	701.150	636.254	0,2%	-14,2%
19 India	6.104.624	5.481.318	10.045.505	0,7%	11,4%	1.540.147	1.196.588	1.152.077	1,2%	28,7%	4.424.992	3.964.045	3.942.492	1,2%	11,6%
20 Bangladesh	5.212.338	1.480.458	43.420	0,6%	252,1%	402.551	107.971	2.638	0,3%	272,8%	640.683	162.916	2.816	0,2%	293,3%
21 Cambodia	5.007.815	2.251.775	1.325.111	0,6%	122,4%	164.405	182.698	53.260	0,1%	-10,0%	8.406.988	1.376.669	57.634	2,2%	510,7%
22 Turkey	4.834.916	4.400.447	815.826	0,6%	9,9%	25.431	62.106	24.950	0,02%	-59,1%	15.706.935	9.500.500	1.280.768	4,1%	65,3%
23 Nigeria	4.608.722	1.854.182	921.461	0,5%	148,6%	0	0	7.699	0,0%	-	14.921.911	5.853.478	2.288.067	3,9%	154,9%
24 Argentina	4.319.010	7.435.575	7.820.934	0,5%	-41,9%	326.054	546.511	595.186	0,3%	-40,3%	375.925	642.529	614.755	0,1%	-41,5%
25 Poland	3.969.221	4.095.223	6.282.367	0,5%	-3,1%	353.999	374.342	557.397	0,3%	-5,4%	300.882	307.269	463.424	0,1%	-2,1%
26 Malaysia	3.917.695	3.103.450	5.468.896	0,5%	26,2%	358.487	236.564	361.167	0,3%	51,5%	305.535	186.964	294.368	0,1%	63,4%
27 Portugal	3.783.834	3.289.285	2.929.169	0,4%	15,0%	306.842	309.395	263.982	0,2%	-0,8%	444.220	752.924	603.642	0,1%	-41,0%
28 Canada	2.901.049	3.062.586	3.202.421	0,3%	-5,3%	180.172	186.235	187.140	0,1%	-3,3%	203.954	167.275	178.235	0,1%	21,9%
29 Colombia	2.715.600	940.819	1.044.318	0,3%	188,6%	436.439	103.569	94.072	0,3%	321,4%	1.286.991	299.563	234.006	0,3%	329,6%
30 France	2.648.564	3.207.176	3.636.718	0,3%	-17,4%	118.723	136.266	143.163	0,1%	-12,9%	180.128	203.024	228.134	0,05%	-11,3%
Others (2024: +41 countries)	20.464.636	24.586.681	27.225.597	2,4%	-16,8%	2.108.481	2.335.898	2.582.750	1,7%	-9,7%	12.476.505	6.248.377	5.371.663	3,3%	99,7%
<b>Total</b>	<b>851.461.620</b>	<b>748.701.276</b>	<b>858.128.960</b>		<b>13,7%</b>	<b>127.441.989</b>	<b>104.327.476</b>	<b>94.485.065</b>		<b>22,2%</b>	<b>382.656.425</b>	<b>278.862.339</b>	<b>227.516.213</b>		<b>37,2%</b>

Source: MDIC/SECEX - Prepared by: CICB

## ■ ANALYSIS OF DESTINATIONS

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

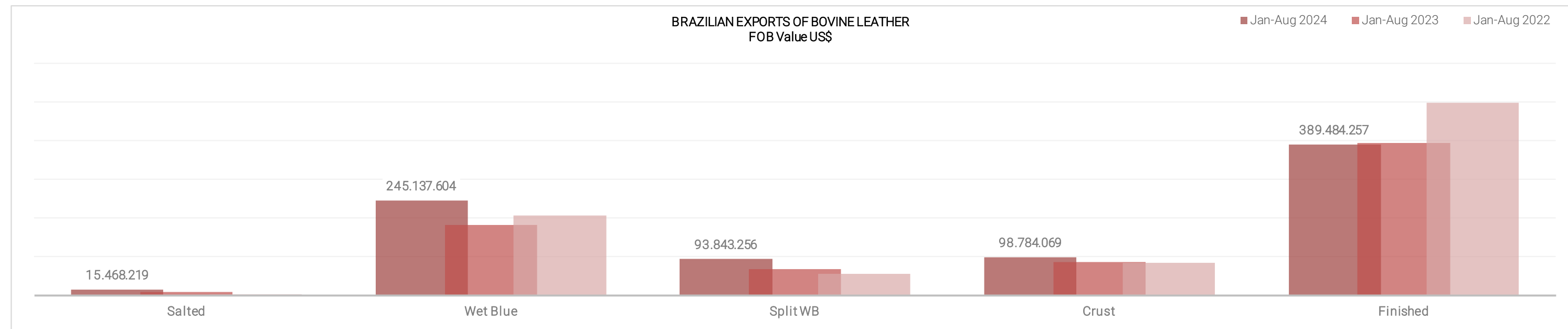
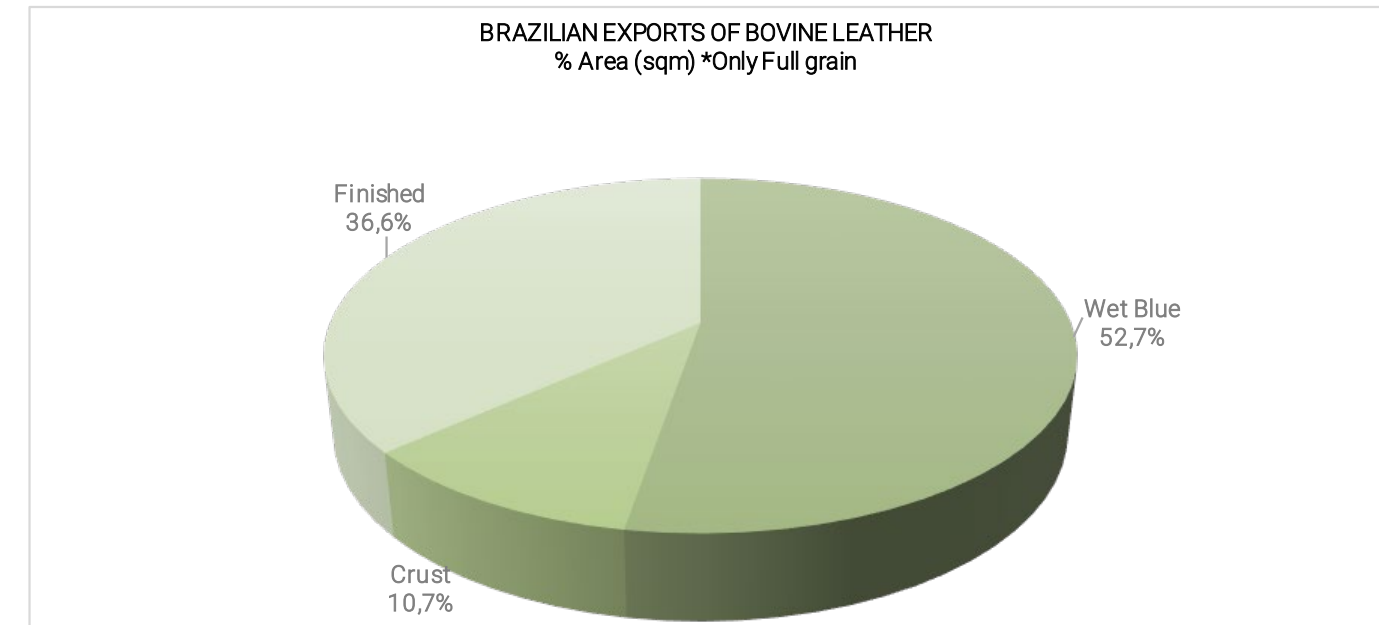
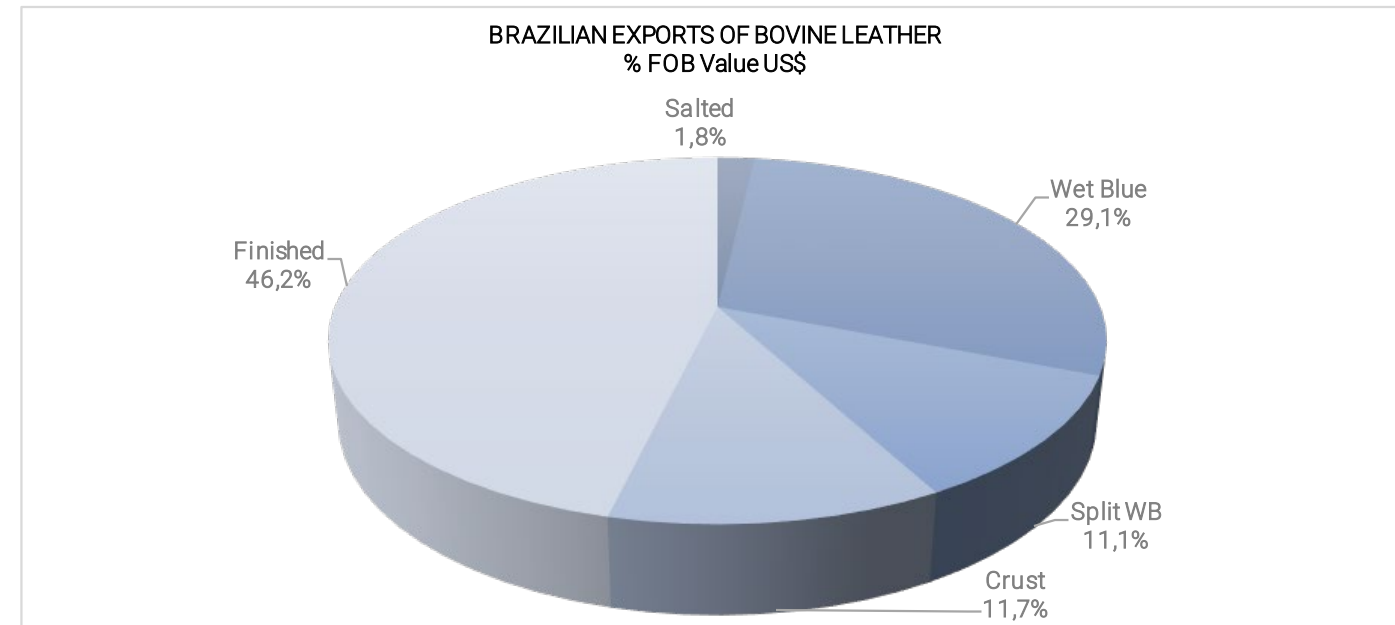
- China (without HK) now has a share in value of 30.8% (previously 30.5%) and 40.9% (40.4%) in area, with increases of 26.3% (+28.9 %) in value and 31.8% (+35.6%) in area;
- United States with a share of 13.6% (13.9%) in value and 6.9% (7.1%) in area, with a drop of 8.3% (-0.8%) in value, and now a drop of 7.5% (+2.0%) in area;
- Italy maintaining a share of 11.6% (11.6%) in value and 13.0% (13.0%) in area, with an increase of 7.4% (+14.1%) in value and 5.2% (+13.0%) in area;

After showing improvements in July, the three main destinations for national exports worsened their value and volume indexes this month. Accumulated shipments to the USA returned to negative levels, while China and Italy still show growth compared to the same period in 2023.

Among the other countries in the TOP10, the two best performances continue to be shipments to Vietnam and Mexico, while strong falls are in South Korea (-69.1% in value and -69.2% in area) and Hong Kong (-25.5% and -27.6%).

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Aug 2024	Jan-Aug 2023	Jan-Aug 2022	2024/2023	2024/2022	Jan-Aug 2024	Jan-Aug 2023	Jan-Aug 2022	2024/2023	2024/2022	Jan-Aug 2024	Jan-Aug 2023	Jan-Aug 2022	2024/2023	2024/2022
Salted	15.468.219	8.410.864	3.629.723	83,9%	326,2%	-	-	-	-	-	47.946.145	19.379.304	6.335.945	147,4%	656,7%
Wet Blue	245.137.604	181.654.697	206.042.493	34,9%	19,0%	49.489.665	36.969.800	27.521.054	33,9%	79,8%	200.575.453	147.767.396	114.753.617	35,7%	74,8%
Split WB	93.843.256	68.627.533	55.292.695	36,7%	69,7%	33.159.558	26.201.671	24.618.851	26,6%	34,7%	93.425.154	74.441.530	68.065.861	25,5%	37,3%
Crust	98.784.069	86.761.827	85.565.462	13,9%	15,4%	10.073.200	7.794.279	6.286.714	29,2%	60,2%	9.751.367	7.635.999	6.453.969	27,7%	51,1%
Finished	389.484.257	394.202.035	497.302.117	-1,2%	-21,7%	34.358.890	33.084.239	35.802.623	3,9%	-4,0%	30.006.022	28.940.946	31.232.520	3,7%	-3,9%
<b>Total</b>	<b>842.717.405</b>	<b>739.656.956</b>	<b>847.832.490</b>	<b>13,9%</b>	<b>-0,6%</b>	<b>127.081.313</b>	<b>104.049.989</b>	<b>94.229.242</b>	<b>22,1%</b>	<b>34,9%</b>	<b>381.704.141</b>	<b>278.165.175</b>	<b>226.841.912</b>	<b>37,2%</b>	<b>68,3%</b>

Source: MDIC/SECEX - Prepared by: CICB



## ■ ANALYSIS OF TYPES OF LEATHER

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

- Wet blue shows a share of 29.1% (29.8%) in value and 52.7% (53.5%) in area, with increases of 34.9% (+45.8%) in value, and 33.9% (+46.2%) in area;
- Split WB with a share of 11.1% (10.9%) in value, with a monetary increase of 36.7% (+34.5%) and 26.6% (+25.1%) in area;
- Crust with a share of 11.7% (11.5%) in value and 10.7% (10.4%) in area, with increases of 13.9% (+17.4%) and 29.2% (+34.8%), respectively;

- Finished leather with 46.2% (46.0%) share in value and 36.6% (36.1%) in area, now again having a drop of 1.2% (+1.8%) in value, with an increase of 3.9% (+7.5%) in area.

The split wb was the exception of the month, showing improvements in the indexes on the result accumulated until July. The other types of leather suffered worse with August shipments.

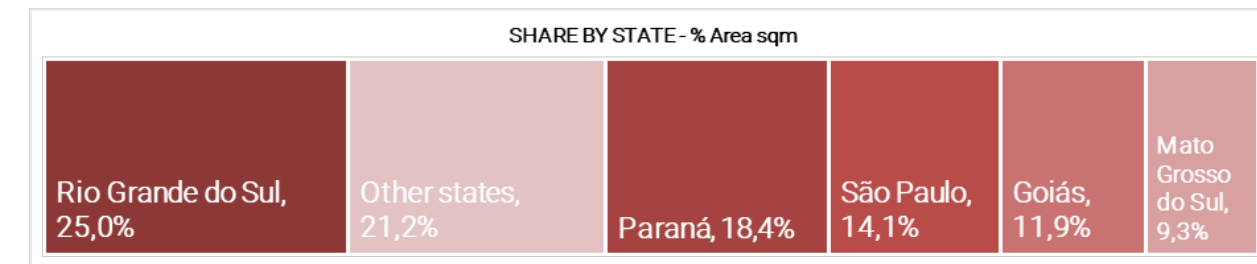
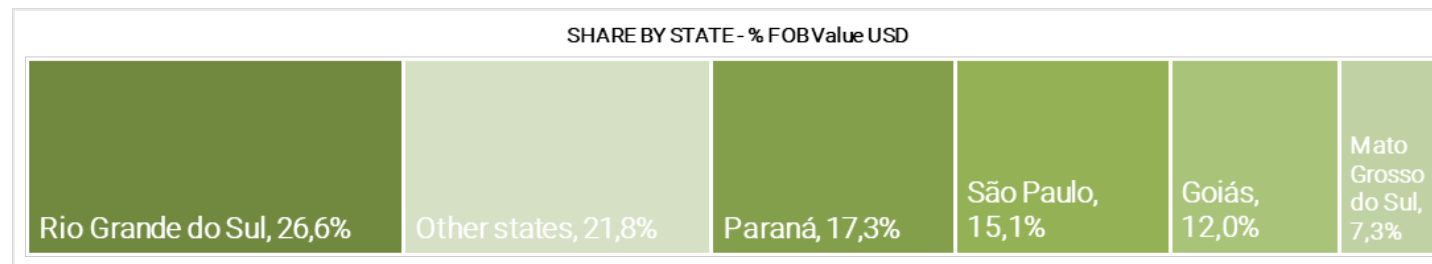
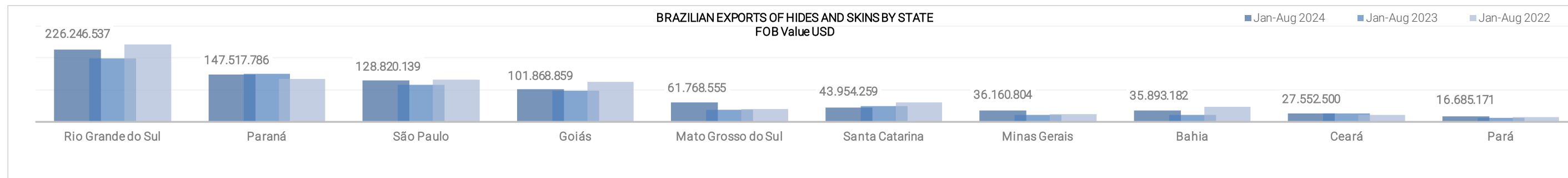
It is worth highlighting that finished and crust leathers, despite their declines in the month, improved their share of the total, due to double-digit reductions in wet blue shipments.

In shipments of skins from other animals, the highlight is equidae, which have already surpassed last year's shipments, with an increase of 56.0% in value.



	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-Aug 2024	Jan-Aug 2023	Jan-Aug 2022	2024	2024/2023		Jan-Aug 2024	Jan-Aug 2023	Jan-Aug 2022	2024	2024/2023		Jan-Aug 2024	Jan-Aug 2023	Jan-Aug 2022	2024	2024/2023	
1 Rio Grande do Sul	226.246.537	198.278.874	242.928.985	26,6%	14,1%	31.921.329	24.639.097	25.159.452	25,0%	29,6%	73.659.000	54.979.247	47.292.809	19,2%	34,0%			
2 Paraná	147.517.786	149.743.816	134.105.708	17,3%	-1,5%	23.478.747	23.677.194	16.951.745	18,4%	-0,8%	72.311.682	65.663.055	43.195.780	18,9%	10,1%			
3 São Paulo	128.820.139	116.727.505	132.148.441	15,1%	10,4%	18.025.041	14.207.835	12.914.900	14,1%	26,9%	51.855.080	30.070.566	24.353.201	13,6%	72,4%			
4 Goiás	101.868.859	98.726.612	126.078.616	12,0%	3,2%	15.176.583	14.111.623	14.278.133	11,9%	7,5%	48.037.873	41.867.871	39.912.320	12,6%	14,7%			
5 Mato Grosso do Sul	61.768.555	37.875.352	40.996.225	7,3%	63,1%	11.849.903	8.220.216	5.767.320	9,3%	44,2%	39.782.198	28.407.982	21.173.426	10,4%	40,0%			
6 Santa Catarina	43.954.259	49.181.221	61.021.358	5,2%	-10,6%	6.078.775	5.749.028	6.545.917	4,8%	5,7%	15.206.413	11.305.045	18.459.086	4,0%	34,5%			
7 Minas Gerais	36.160.804	21.402.041	24.478.712	4,2%	69,0%	6.761.137	3.906.138	3.059.933	5,3%	73,1%	16.317.373	7.936.973	5.255.537	4,3%	105,6%			
8 Bahia	35.893.182	22.321.522	46.807.039	4,2%	60,8%	4.717.142	3.285.685	5.405.580	3,7%	43,6%	13.433.736	6.055.825	8.944.048	3,5%	121,8%			
9 Ceará	27.552.500	26.604.668	21.229.378	3,2%	3,6%	2.721.815	2.434.125	1.385.900	2,1%	11,8%	4.341.325	3.556.400	1.596.195	1,1%	22,1%			
10 Pará	16.685.171	12.706.841	14.256.932	2,0%	31,3%	3.511.755	2.646.451	2.013.003	2,8%	32,7%	17.923.224	12.830.323	10.006.889	4,7%	39,7%			
11 Mato Grosso	9.572.292	3.881.706	5.388.357	1,1%	146,6%	1.841.626	835.913	682.984	1,4%	120,3%	7.295.789	2.852.424	2.637.271	1,9%	155,8%			
12 Amazonas	3.410.714	171.699	747.152	0,4%	1886,4%	695.467	31.682	82.011	0,5%	2095,1%	3.507.230	160.080	418.995	0,9%	2090,9%			
13 Rio de Janeiro	3.139.146	3.463.480	3.244.931	0,4%	-9,4%	47.456	111.116	57.291	0,04%	-57,3%	162.384	261.739	35.600	0,04%	-38,0%			
14 Pernambuco	2.846.132	2.049.710	769.627	0,3%	38,9%	62.743	31.779	23.817	0,05%	97,4%	7.963.235	5.150.472	1.104.273	2,1%	54,6%			
15 Rio Grande do Norte	2.449.084	2.594.588	1.146.413	0,3%	-5,6%	0	0	0	0,0%	-	8.262.060	5.930.590	2.130.700	2,2%	39,3%			
16 Piauí	1.373.053	1.194.722	1.736.723	0,2%	14,9%	71.165	61.417	96.950	0,1%	15,9%	40.925	36.006	53.679	0,01%	13,7%			
17 Rondônia	1.056.411	143.375	0	0,1%	636,8%	286.101	37.068	0	0,2%	671,8%	1.021.546	131.676	0	0,3%	675,8%			
18 Maranhão	762.395	293.237	136.070	0,1%	160,0%	152.212	63.087	18.577	0,1%	141,3%	770.149	153.490	14.612	0,2%	401,8%			
19 Distrito Federal	241.870	494.279	235.120	0,03%	-51,1%	42.850	100.060	36.593	0,03%	-57,2%	213.783	532.435	184.720	0,1%	-59,8%			
20 Espírito Santo	67.871	10.550	15.606	0,01%	543,3%	133	105	143	0,000%	26,7%	192.961	65	78	0,1%	296763,1%			
21 Alagoas	56.220	0	0	0,01%	-	0	0	0	0,00%	-	278.950	0	0	0,1%	-			
22 Amapá	17.452	0	634.510	0,002%	-	0	0	0	0,0%	-	79.500	0	725.675	0,02%	-			
23 Not declared*	1.188	0	1.365	0,000%	-	9	0	66	0,0%	-	9	0	34	0,0%	-			
24 Paraíba	0	52.191	0	0,0%	-100,0%	0	0	0	0,0%	-	0	106.000	0	0,0%	-100,0%			
25 Tocantins	0	783.287	21.692	0,0%	-100,0%	0	177.857	4.750	0,0%	-100,0%	0	874.075	21.285	0,0%	-100,0%			
<b>Total</b>	<b>851.461.620</b>	<b>748.701.276</b>	<b>858.128.960</b>	<b>100,0%</b>	<b>13,7%</b>	<b>127.441.989</b>	<b>104.327.476</b>	<b>94.485.065</b>	<b>100,0%</b>	<b>22,2%</b>	<b>382.656.425</b>	<b>278.862.339</b>	<b>227.516.213</b>	<b>100,0%</b>	<b>37,2%</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, from January to August, presented the following highlights:

- Among the TOP10, the state of Paraná now joins Santa Catarina in the monetary decline, with -1.5% and -10.6%, respectively. Minas Gerais has the highest growth, with +69.0%, with Mato Grosso do Sul (+63.1%) and Bahia (+60.8%) coming close.
- Considering the shipped area, Paraná has a slight drop of 0.8%, with the other states in the TOP10 showing growth;
- Among the other states, Amazonas continues to show significant growth, with Mato Grosso in 11th place;
- The ranking of states now has Rio Grande do Sul also leading in weight, leaving Paraná in second place in the three indexes.

## ■ CLOSING REMARKS

In August, we have the first drop of the year in value and volume indicators, compared to the corresponding month of last year.

Going through the main markets, we can conclude that the underperformance of August's exports had its most significant origin in shipments to the United States and Italy, while in China there was a certain stability in the indexes, even allowing for an increase in share.

With the exception of split wb, the other types of leather saw drops in shipments over August 2023, where wet blue and finished leather saw double-digit percentage reductions. Despite the increase in split, with a significant 40.0% in value and 23.6% in volume, the share of around 10% of this type of leather was not enough to sustain the declines of the others.

The consequences of the summer in the northern hemisphere, which traditionally harm all activities, except those linked to tourism, had an impact on national exports in the month of August. Additionally, this year, wars, economic, political and geopolitical uncertainties and climate disasters increase global challenges.

The world of leather shows cautious optimism regarding the second half of the year, with expectations also regarding the results of the large commercial platforms, which began in September with ACLE in Shanghai, and continues with Lineapelle, in Milan. -