

JULY

2024

Brazilian exports of Hides and Skins



Brazilian leather



apexBrasil

MINISTÉRIO DO
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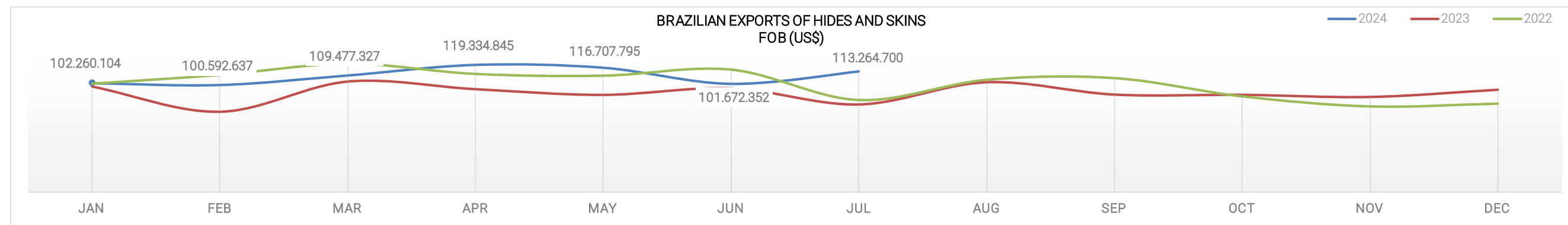
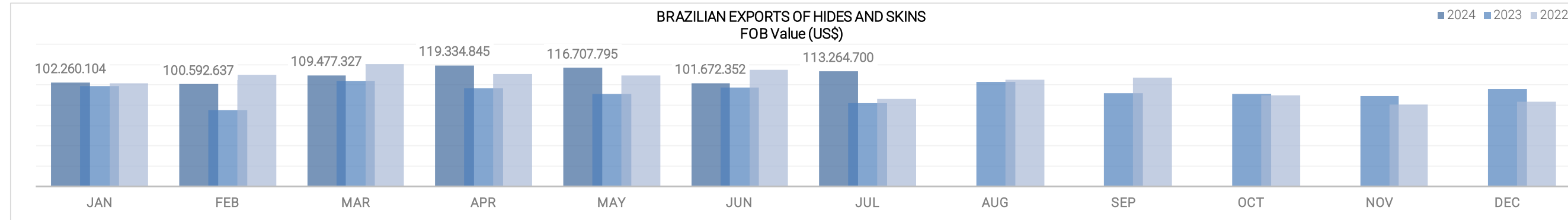
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MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022
JAN	102.260.104	99.097.256	101.697.054	6,5%	3,2%	0,6%	15.257.649	14.458.015	12.063.997	5,0%	5,5%	26,5%	42.748.515	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	109.477.327	103.785.252	120.139.328	8,8%	5,5%	-8,9%	16.044.211	14.083.877	13.625.210	8,5%	13,9%	17,8%	48.628.565	36.974.204	31.859.528	3,8%	31,5%	52,6%
APR	119.334.845	96.588.085	110.738.209	9,0%	23,6%	7,8%	18.574.946	13.705.693	11.773.200	15,8%	35,5%	57,8%	57.622.782	35.449.787	28.030.076	18,5%	62,5%	105,6%
MAY	116.707.795	91.214.382	109.124.938	-2,2%	27,9%	6,9%	17.331.649	12.063.660	11.199.958	-6,7%	43,7%	54,7%	52.820.390	31.339.687	24.982.739	-8,3%	68,5%	111,4%
JUN	101.672.352	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%	48.915.626	34.008.351	32.538.087	-7,4%	43,8%	50,3%
JUL	113.264.700	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		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			
Total	763.309.760	1.116.751.780	1.218.838.305		18,2%	1,4%	114.421.106	158.963.267	140.749.731		27,6%	39,4%	344.371.574	430.611.610	354.537.869		44,7%	76,4%

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 July 2024, registered a value of US\$ 113.3 million, representing increases of 11.4% over the previous month, and 37.8% over the same month last year, when US\$ 82.2 million were exported.

Considering volume, 16.7 million square meters and 46.8 thousand tons were exported, which meant, respectively, increases of 50.0% and 58.3% over the same month in 2023. Compared to June, there was an increase of 5.8% in area, but a 4.3% drop in weight.

The period from January to July totaled US\$ 763.3 million, 18.2% above the same period in 2023, with increases also of 27.6% in area and 44.7% 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-Jul 2024	Jan-Jul 2023	Jan-Jul 2022	2024	2024/2023	Jan-Jul 2024	Jan-Jul 2023	Jan-Jul 2022	2024	2024/2023	Jan-Jul 2024	Jan-Jul 2023	Jan-Jul 2022	2024	2024/2023
1 China + Hong Kong	248.706.664	201.107.752	214.642.996	32,6%	23,7%	49.219.527	38.054.351	30.386.293	43,0%	29,3%	157.010.952	113.715.896	81.105.295	45,6%	38,1%
China	232.551.377	180.424.830	173.671.620	30,5%	28,9%	46.252.958	34.114.421	25.652.554	40,4%	35,6%	148.667.580	103.784.718	69.007.881	43,2%	43,2%
2 United States	105.906.865	106.776.188	142.064.950	13,9%	-0,8%	8.146.673	7.986.670	9.128.094	7,1%	2,0%	7.240.913	7.092.264	7.885.059	2,1%	2,1%
3 Italy	88.171.807	77.287.152	126.345.636	11,6%	14,1%	14.838.297	13.127.515	14.983.507	13,0%	13,0%	47.534.147	41.887.944	49.824.537	13,8%	13,5%
4 Vietnam	81.286.932	37.828.703	40.035.731	10,6%	114,9%	16.367.207	7.585.741	6.892.080	14,3%	115,8%	39.278.306	18.232.576	16.515.597	11,4%	115,4%
5 Mexico	42.393.154	28.427.395	26.114.344	5,6%	49,1%	4.176.106	2.790.387	1.582.038	3,6%	49,7%	5.815.691	3.945.728	1.563.436	1,7%	47,4%
6 Thailand	25.883.240	23.875.054	28.397.265	3,4%	8,4%	3.224.324	2.451.966	2.033.554	2,8%	31,5%	8.428.113	4.479.709	3.438.893	2,4%	88,1%
7 Germany	19.899.178	19.373.612	31.910.217	2,6%	2,7%	1.629.095	1.470.499	2.169.316	1,4%	10,8%	1.371.942	1.247.385	1.797.138	0,4%	10,0%
Hong Kong	16.155.287	20.682.922	40.971.376	2,1%	-21,9%	2.966.569	3.939.930	4.733.739	2,6%	-24,7%	8.343.372	9.931.178	12.097.414	2,4%	-16,0%
8 Hungary	12.076.852	13.107.150	13.508.532	1,6%	-7,9%	1.047.283	1.054.040	913.945	0,9%	-0,6%	874.596	912.006	842.179	0,3%	-4,1%
9 South Korea	10.325.641	30.184.665	14.486.865	1,4%	-65,8%	980.479	2.832.256	1.434.192	0,9%	-65,4%	1.078.741	3.313.928	3.226.917	0,3%	-67,4%
10 Taiwan	9.592.442	9.584.639	11.274.420	1,3%	0,1%	1.976.523	2.369.109	2.794.600	1,7%	-16,6%	6.496.699	6.865.249	6.894.089	1,9%	-5,4%
11 Indonesia	8.432.815	2.619.379	12.970.779	1,1%	221,9%	1.392.928	330.129	1.088.571	1,2%	321,9%	2.459.061	249.239	846.781	0,7%	886,6%
12 Tunisia	8.244.132	6.880.554	5.167.816	1,1%	19,8%	528.664	438.300	322.468	0,5%	20,6%	780.433	676.079	508.334	0,2%	15,4%
13 Uruguay	8.143.100	6.378.440	4.409.089	1,1%	27,7%	1.047.344	781.264	628.123	0,9%	34,1%	4.140.027	2.728.343	2.383.866	1,2%	51,7%
14 Slovakia	8.118.551	4.935.256	977.490	1,1%	64,5%	544.601	310.206	48.837	0,5%	75,6%	512.861	306.391	65.625	0,1%	67,4%
15 Switzerland	6.487.447	2.718.966	1.997.909	0,8%	138,6%	1.386.797	611.763	618.087	1,2%	126,7%	3.423.272	2.262.679	2.334.921	1,0%	51,3%
16 Norway	6.479.978	4.492.213	6.253.695	0,8%	44,2%	440.805	311.589	349.811	0,4%	41,5%	310.897	219.224	248.294	0,1%	41,8%
17 India	5.652.202	4.767.801	8.628.195	0,7%	18,5%	1.459.566	998.357	913.416	1,3%	46,2%	4.156.159	3.234.432	3.261.074	1,2%	28,5%
18 Netherlands	5.511.609	6.331.110	7.586.975	0,7%	-12,9%	546.342	637.888	613.891	0,5%	-14,4%	537.042	618.440	566.959	0,2%	-13,2%
19 Spain	5.316.803	5.395.287	2.875.839	0,7%	-1,5%	1.274.817	1.380.141	946.102	1,11%	-7,6%	3.353.801	3.962.991	2.665.851	1,0%	-15,4%
20 Cambodia	4.496.770	2.123.139	1.215.273	0,6%	111,8%	120.942	176.733	49.009	0,1%	-31,6%	8.264.042	1.372.255	52.499	2,4%	502,2%
21 Turkey	4.368.083	3.830.731	617.351	0,6%	14,0%	25.431	62.106	18.794	0,0%	-59,1%	14.027.281	8.182.515	919.271	4,1%	71,4%
22 Bangladesh	4.003.190	1.206.912	24.489	0,5%	231,7%	314.659	87.260	1.503	0,3%	260,6%	520.551	136.395	1.539	0,2%	281,6%
23 Nigeria	3.894.079	1.411.139	632.626	0,5%	176,0%	0	0	7.699	0,0%	-	12.606.732	4.494.751	1.467.317	3,7%	180,5%
24 Poland	3.792.953	3.583.197	5.409.461	0,5%	5,9%	336.854	328.015	476.313	0,3%	2,7%	288.502	265.531	402.793	0,1%	8,7%
25 Portugal	3.702.686	2.794.178	2.758.192	0,5%	32,5%	302.836	278.087	242.371	0,3%	8,9%	441.723	724.599	538.511	0,1%	-39,0%
26 Argentina	3.565.127	7.060.494	6.752.291	0,5%	-49,5%	238.561	513.347	506.732	0,2%	-53,5%	297.650	611.469	543.844	0,1%	-51,3%
27 Malaysia	3.200.830	3.041.954	4.179.044	0,4%	5,2%	281.532	232.994	280.902	0,2%	20,8%	247.449	184.133	231.823	0,1%	34,4%
28 Colombia	2.564.962	796.710	998.700	0,3%	221,9%	423.294	90.031	91.729	0,4%	370,2%	1.261.628	267.898	232.264	0,4%	370,9%
29 Canada	2.523.188	2.679.714	2.851.549	0,3%	-5,8%	159.022	163.634	166.682	0,1%	-2,8%	184.081	146.801	159.341	0,1%	25,4%
30 France	2.372.752	2.807.593	3.541.661	0,3%	-15,5%	106.416	120.980	139.512	0,1%	-12,0%	160.185	178.063	221.942	0,05%	-10,0%
Others (2024: +38 countries)	18.195.728	22.143.974	24.180.690	2,4%	-17,8%	1.884.181	2.117.537	2.258.739	1,6%	-11,0%	11.268.097	5.430.582	4.519.262	3,3%	107,5%
Total	763.309.760	645.551.051	752.810.070		18,2%	114.421.106	89.692.895	82.086.910		27,6%	344.371.574	237.945.495	195.265.251		44,7%

Source: MDIC/SECEX - Prepared by: CICB

■ ANALYSIS OF DESTINATIONS

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

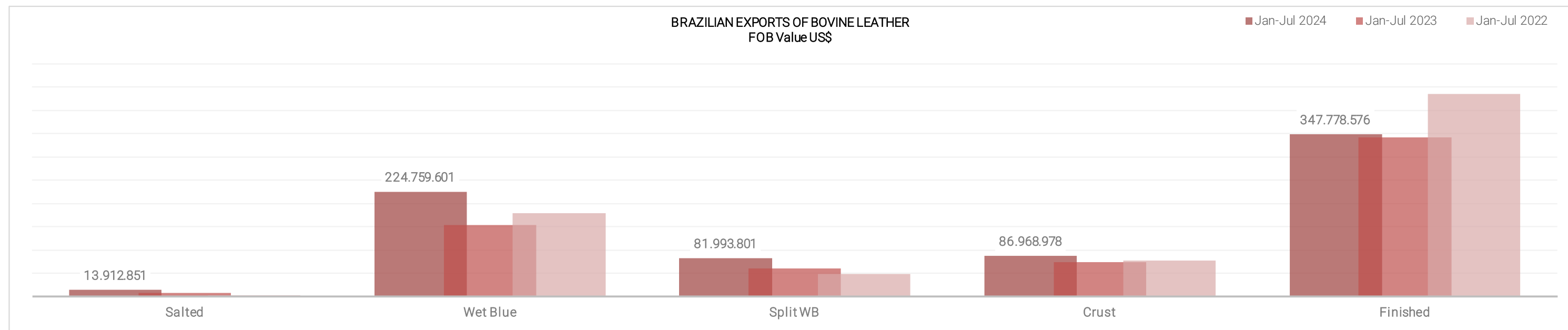
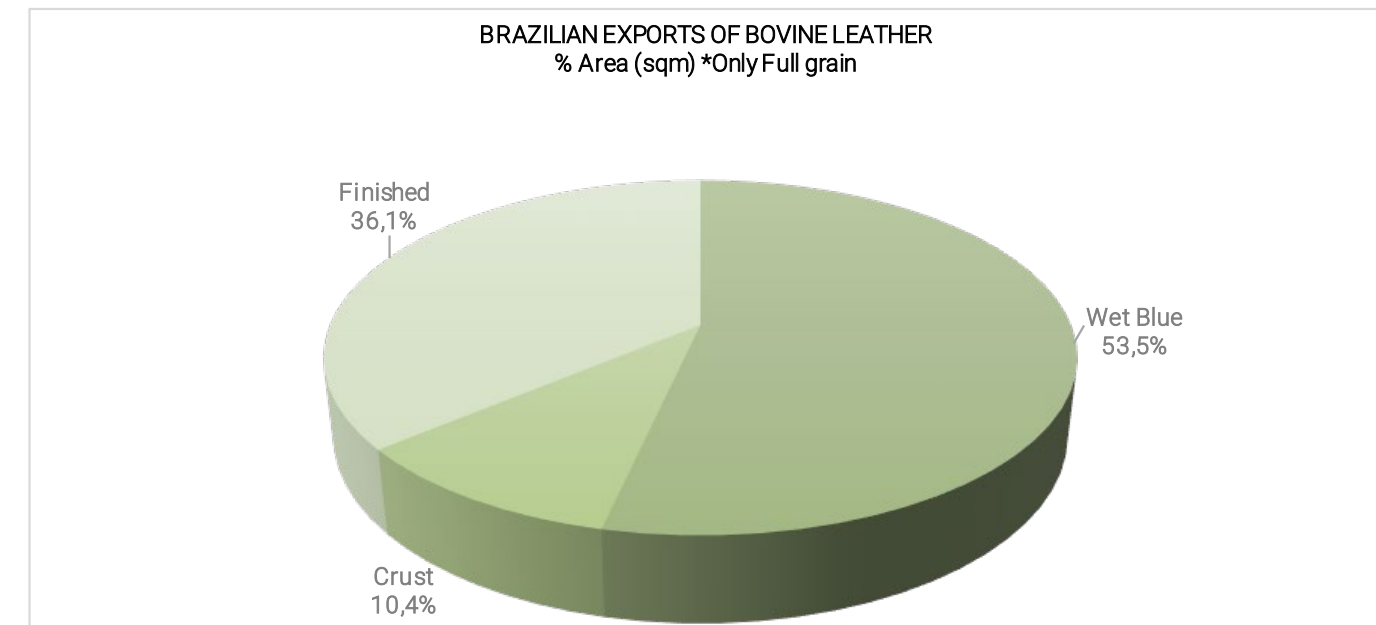
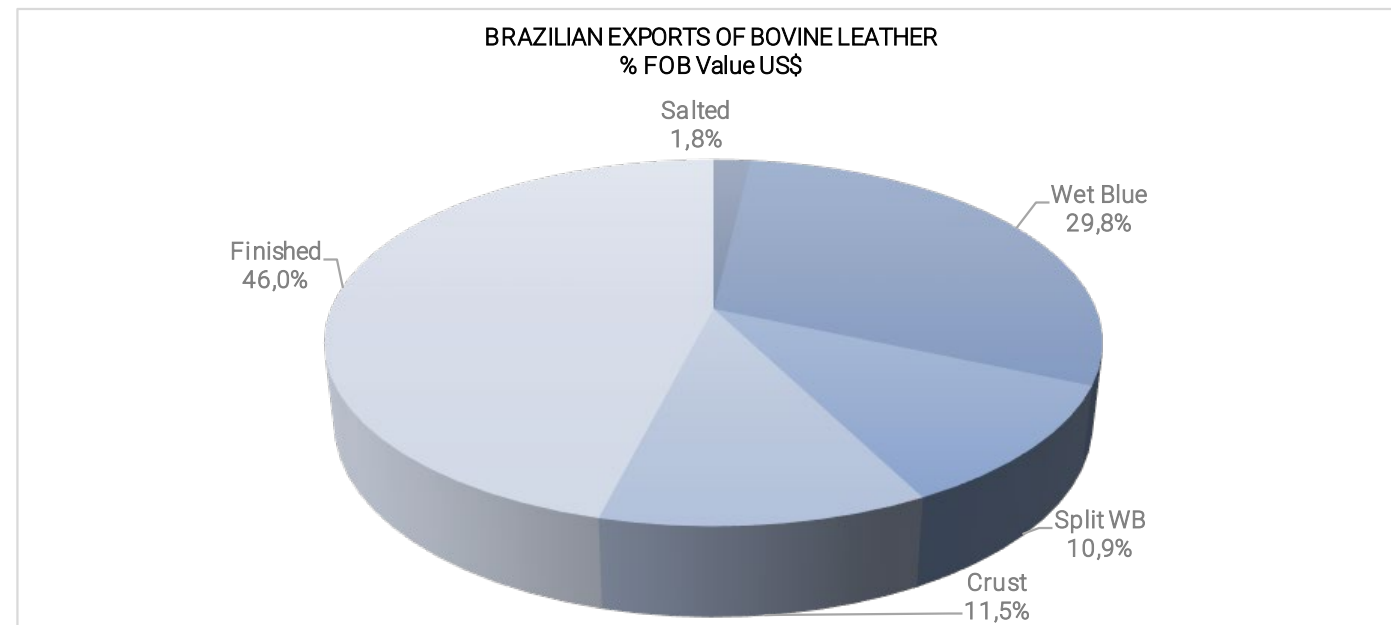
- China (without HK) now has a share in value of 30.5% (previously 29.9%) and 40.4% (40.1%) in area, with increases of 28.9% (+24.7 %) in value and 35.6% (+33.3%) in area;
- United States with a share of 13.9% (13.4%) in value and 7.1% (6.8%) in area, with a drop of 0.8% (-7.3%) in value, and now an increase of 2.0% (-5.9%) in area;
- Italy with a share of 11.6% (12.5%) in value and 13.0% (14.0%) in area, with an increase of 14.1% (+13.6%) in value and 13.0% (+10.9%) in area;

The three main destinations for national exports saw improvements in their value and volume indexes in July. As a result, we now have only a slight monetary drop in exports to the North Americans (-0.8%), with the other accumulated positive comparisons.

Among the other TOP10 countries, the two best performances are exports to Vietnam (+114.9% in value and +115.8% in area), and Mexico (+49.1% and +49.7%).

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Jul 2024	Jan-Jul 2023	Jan-Jul 2022	2024/2023	2024/2022	Jan-Jul 2024	Jan-Jul 2023	Jan-Jul 2022	2024/2023	2024/2022	Jan-Jul 2024	Jan-Jul 2023	Jan-Jul 2022	2024/2023	2024/2022
Salted	13.912.851	7.171.602	2.845.531	94,0%	388,9%	-	-	-	-	-	42.969.134	16.177.383	4.707.982	165,6%	812,7%
Wet Blue	224.759.601	154.154.844	178.955.419	45,8%	25,6%	45.405.633	31.059.678	23.163.068	46,2%	96,0%	183.350.853	123.543.407	96.523.909	48,4%	90,0%
Split WB	81.993.801	60.965.656	48.655.577	34,5%	68,5%	29.222.073	23.349.689	21.848.706	25,1%	33,7%	81.747.945	66.190.141	60.392.916	23,5%	35,4%
Crust	86.968.978	74.094.785	77.621.079	17,4%	12,0%	8.815.980	6.541.718	5.710.132	34,8%	54,4%	8.543.433	6.497.342	5.823.463	31,5%	46,7%
Finished	347.778.576	341.573.179	435.518.488	1,8%	-20,1%	30.633.272	28.505.748	31.145.194	7,5%	-1,6%	26.831.630	24.998.746	27.231.104	7,3%	-1,5%
Total	755.413.807	637.960.066	743.596.094	18,4%	1,6%	114.076.958	89.456.833	81.867.100	27,5%	39,3%	343.442.995	237.407.019	194.679.374	44,7%	76,4%

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 July, compared to the same period of the previous year:

- Wet blue shows a share of 29.8% (30.6%) in value and 53.5% (54.5%) in area, with increases of 45.8% (+42.2%) in value, and 46.2% (+42.6%) in area;
- Split WB with a share of 10.9% (10.6%) in value, with a monetary increase of 34.5% (+30.8%) and 25.1% (+22.3%) in area;
- Crust maintaining a share of 11.5% (11.5%) in value and 10.4% (10.2%) in area, with an increase of 17.4% (+20.1%) and 34, 8% (+37.6%), respectively;

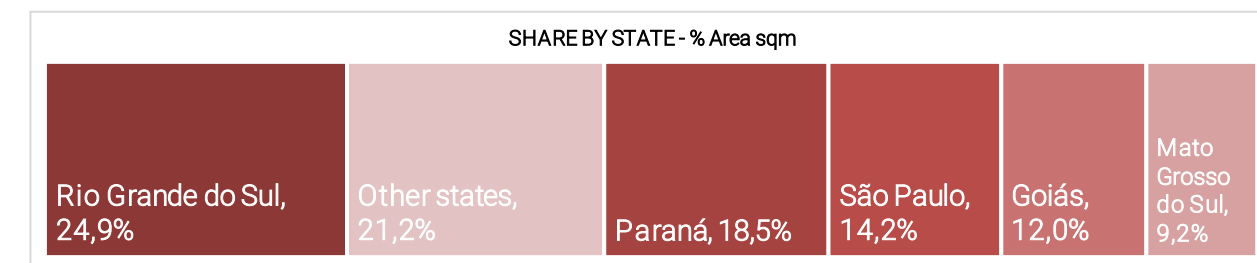
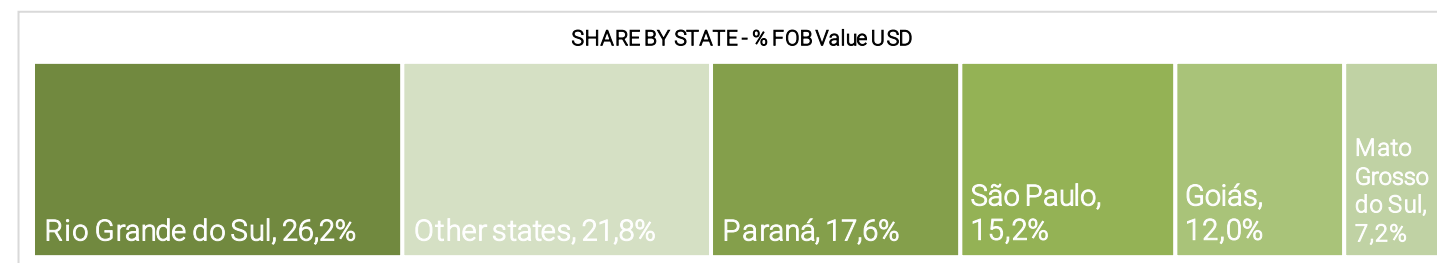
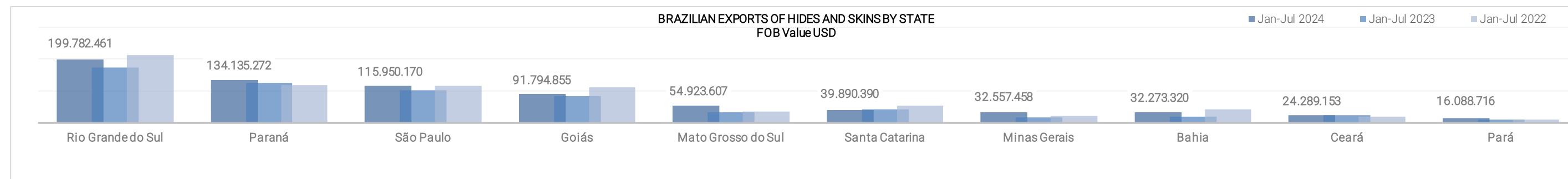
- Finished leather with 46.0% (45.5%) share in value and 36.1% (35.3%) in area, now with increases of 1.8% (-2.1%) in value, and of 7.5% (+2.9%) in area.

July saw the highest monthly value and volume of finished leather exported. As a result, the share of this type of leather improved overall, after consecutive months of declines, in contrast to the rise in exports of wet blue.

Crust also performed well, with the second highest monthly volume of the year.

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-Jul 2024	Jan-Jul 2023	Jan-Jul 2022	2024	2024/2023		Jan-Jul 2024	Jan-Jul 2023	Jan-Jul 2022	2024	2024/2023		Jan-Jul 2024	Jan-Jul 2023	Jan-Jul 2022	2024	2024/2023	
1 Rio Grande do Sul	199.782.461	173.437.419	212.638.786	26,2%	15,2%	28.491.934	21.654.673	21.996.639	24,9%	31,6%	65.125.906	48.022.201	41.446.076	18,9%	35,6%			
2 Paraná	134.135.272	124.873.951	119.382.227	17,6%	7,4%	21.217.987	19.686.236	14.952.284	18,5%	7,8%	65.728.649	54.449.965	38.364.476	19,1%	20,7%			
3 São Paulo	115.950.170	103.082.820	115.019.883	15,2%	12,5%	16.224.406	12.647.984	10.983.837	14,2%	28,3%	47.898.449	27.284.027	19.987.403	13,9%	75,6%			
4 Goiás	91.794.855	84.205.103	110.669.111	12,0%	9,0%	13.704.666	11.952.891	12.511.521	12,0%	14,7%	43.740.131	35.489.157	35.040.695	12,7%	23,2%			
5 Mato Grosso do Sul	54.923.607	33.075.325	35.132.620	7,2%	66,1%	10.519.466	7.173.601	4.757.932	9,2%	46,6%	35.009.669	25.168.300	17.405.006	10,2%	39,1%			
6 Santa Catarina	39.890.390	43.402.150	54.187.632	5,2%	-8,1%	5.406.844	4.973.345	5.670.415	4,7%	8,7%	13.546.931	9.746.264	15.943.381	3,9%	39,0%			
7 Minas Gerais	32.557.458	16.846.488	21.072.428	4,3%	93,3%	6.055.195	3.149.507	2.680.192	5,3%	92,3%	14.863.631	6.423.163	4.318.011	4,3%	131,4%			
8 Bahia	32.273.320	19.637.652	42.757.613	4,2%	64,3%	4.199.583	3.016.651	5.014.141	3,7%	39,2%	12.114.880	5.398.217	8.473.214	3,5%	124,4%			
9 Ceará	24.289.153	24.873.280	18.534.892	3,2%	-2,3%	2.483.663	2.304.717	1.207.979	2,2%	7,8%	3.870.323	3.413.455	1.452.228	1,1%	13,4%			
10 Pará	16.088.716	9.681.687	10.679.559	2,1%	66,2%	3.402.026	1.964.467	1.387.692	3,0%	73,2%	17.222.957	9.647.022	6.725.224	5,0%	78,5%			
11 Mato Grosso	8.666.015	3.123.101	4.970.714	1,1%	177,5%	1.619.929	667.068	617.119	1,4%	142,8%	6.438.792	2.249.346	2.438.866	1,9%	186,3%			
12 Amazonas	2.807.706	123.462	747.152	0,4%	2174,1%	550.646	24.727	82.011	0,5%	2126,9%	2.802.990	119.440	418.995	0,8%	2246,8%			
13 Rio de Janeiro	2.513.946	2.839.906	2.759.797	0,3%	-11,5%	40.156	75.146	52.345	0,04%	-46,6%	158.540	197.461	33.106	0,0%	-19,7%			
14 Pernambuco	2.397.603	1.747.958	659.845	0,3%	37,2%	62.743	31.779	23.817	0,1%	97,4%	6.618.805	4.091.355	616.603	1,9%	61,8%			
15 Rio Grande do Norte	2.110.985	2.075.337	898.060	0,3%	1,7%	0	0	0	0,0%	-	7.120.330	4.749.590	1.649.500	2,1%	49,9%			
16 Piauí	1.294.635	1.068.344	1.736.723	0,2%	21,2%	67.208	55.215	96.950	0,1%	21,7%	38.441	32.626	53.679	0,01%	17,8%			
17 Rondônia	811.823	143.375	0	0,1%	466,2%	218.858	37.068	0	0,2%	490,4%	789.371	131.676	0	0,2%	499,5%			
18 Maranhão	652.077	293.237	98.223	0,1%	122,4%	112.804	63.087	13.520	0,1%	78,8%	601.276	153.490	10.916	0,2%	291,7%			
19 Distrito Federal	241.870	385.410	216.110	0,03%	-37,2%	42.850	79.666	33.557	0,04%	-46,2%	213.783	421.045	167.570	0,1%	-49,2%			
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	41.187	0	0	0,01%	-	0	0	0	0,00%	-	195.250	0	0	0,1%	-			
22 Amapá	17.452	0	610.032	0,00%	-	0	0	0	0,0%	-	79.500	0	698.905	0,02%	-			
23 Not declared*	1.188	0	1.365	0,00%	-	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	572.305	21.692	0,0%	-100,0%	0	134.962	4.750	0,0%	-100,0%	0	651.630	21.285	0,0%	-100,0%			
Total	763.309.760	645.551.051	752.810.070	100,0%	18,2%	114.421.106	89.692.895	82.086.910	100,0%	27,6%	344.371.574	237.945.495	195.265.251	100,0%	44,7%			

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 July, presented the following highlights:

- Among the TOP10, the states of Santa Catarina and Ceará still show drops in values, with -8.1% and -2.3%, respectively.
- Minas Gerais has significant growth, with +93.3%. Considering the traded area, now all states among the TOP10 show growth, with Minas Gerais also highlighted (+92.3%);
- Among the other states, Mato Grosso is close to tripling the value exported, also exceeding double the volume. Amazonas has the biggest growth of the year and rises to 12th position;
- The year-to-date ranking has not changed, with Rio Grande do Sul leading in value and area, followed by Paraná.

■ CLOSING REMARKS

After closing the first half of 2024 with growing exports, although with a reduction in the pace of June, the data returned to double-digit growth in the month of July.

The value registered the highest monthly growth of the year, with +37.8%, compared to the same month last year. Despite the weak base of July 2023, when we had the second worst month of the year, the absolute value of July 2024 was the third best of the year, so that the concern about a reduction in the pace of exports, at least so far, it didn't happen.

Despite the decrease in shipments of wet blue leather in July, remaining well below that year's monthly average in value and volume, there was a growth of 78% in value and 78.5% in area over the same month of last year.

In addition to this influence of wet blue, finished leather had its best performance of the year, both in value and area, contributing strongly to the month's exports.

The recovery of shipments to the United States was extremely important, where finished leather has a greater share. As a result, they now present stability in value and growth in area and weight, even if shortened.

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