

MAY

2024

Brazilian exports of Hides and Skins

Brazilian leather



apexBrasil

MINISTÉRIO DO
DESENVOLVIMENTO,
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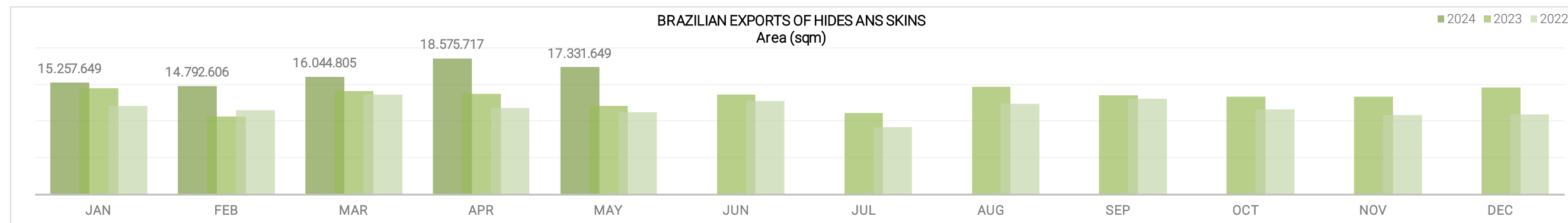
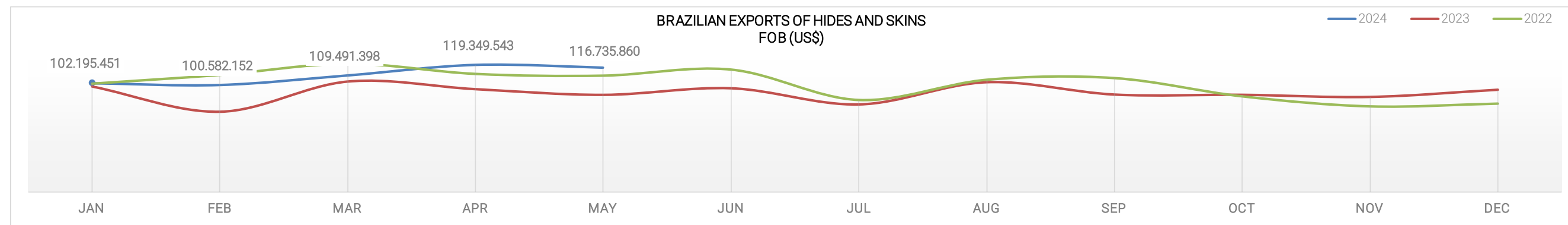
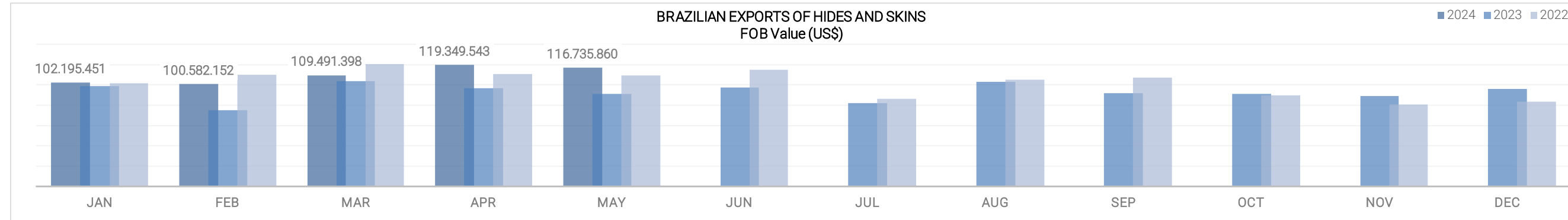
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MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022
JAN	102.195.451	99.097.256	101.697.054	6,4%	3,1%	0,5%	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	100.582.152	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%	46.819.941	29.776.931	25.501.700	9,5%	57,2%	83,6%
MAR	109.491.398	103.785.252	120.139.328	8,9%	5,5%	-8,9%	16.044.805	14.083.877	13.625.210	8,5%	13,9%	17,8%	48.629.159	36.974.204	31.859.528	3,9%	31,5%	52,6%
APR	119.349.543	96.588.085	110.738.209	9,0%	23,6%	7,8%	18.575.717	13.705.693	11.773.200	15,8%	35,5%	57,8%	57.623.403	35.449.787	28.030.076	18,5%	62,5%	105,6%
MAY	116.735.860	91.214.382	109.124.938	-2,2%	28,0%	7,0%	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		97.427.722	114.733.220					13.607.331	12.737.959					34.008.351	32.538.087			
JUL		82.168.631	86.582.958					11.107.588	9.168.223					29.554.021	21.825.224			
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	548.354.404	1.116.751.780	1.218.838.305		17,7%	-0,6%	82.002.426	158.963.267	140.749.731		26,2%	36,3%	248.641.408	430.611.610	354.537.869		42,6%	76,5%

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 May 2024, registered a value of US\$ 116.7 million, representing reduction of 2.2% compared to the previous month, but increase of 28.0% compared to the same month last year, when US\$ 91.2 million were exported.

Considering volume, 17.3 million square meters and 52.8 thousand tons were exported, which meant, respectively, increases of 43.7% and 68.5% over the same month in 2023. Compared to April, there were drops of 6.7% in area and 8.3% in weight.

The first five months of the year totaled US\$ 548.4 million, 17.7% above the same period in 2023, with increases also of 26.2% in area and 42.6% in weight.

COUNTRIES	FOB VALUE (US\$)			Share	Δ	AREA (sqm)			Share	Δ	WEIGHT (KG)			Share	Δ
	Jan-May 2024	Jan-May 2023	Jan-May 2022	2024	2024/2023	Jan-May 2024	Jan-May 2023	Jan-May 2022	2024	2024/2023	Jan-May 2024	Jan-May 2023	Jan-May 2022	2024	2024/2023
1 China + Hong Kong	177.680.938	145.838.312	162.561.443	32,4%	21,8%	35.521.764	27.605.804	23.024.727	43,3%	28,7%	114.115.395	84.080.352	61.019.935	45,9%	35,7%
China	164.508.051	132.069.528	133.217.831	30,0%	24,6%	33.059.447	24.822.109	19.776.885	40,3%	33,2%	107.144.015	76.780.290	52.938.195	43,1%	39,5%
2 United States	75.850.162	77.950.455	102.748.019	13,8%	-2,7%	5.717.819	5.913.216	6.536.782	7,0%	-3,3%	4.962.721	5.248.930	5.594.569	2,0%	-5,5%
3 Italy	65.966.971	59.211.237	94.033.617	12,0%	11,4%	11.178.160	10.358.955	11.047.780	13,6%	7,9%	36.964.036	34.566.969	36.337.233	14,9%	6,9%
4 Vietnam	54.285.158	23.632.862	28.567.298	9,9%	129,7%	10.973.047	4.796.125	4.788.050	13,4%	128,8%	26.643.430	11.420.236	11.363.731	10,7%	133,3%
5 Mexico	31.842.497	20.859.086	16.984.635	5,8%	52,7%	3.237.521	2.025.119	1.060.228	3,9%	59,9%	4.658.730	2.800.895	1.065.511	1,9%	66,3%
6 Thailand	17.879.312	17.511.692	20.058.820	3,3%	2,1%	2.100.742	1.854.987	1.416.481	2,6%	13,2%	4.994.848	3.643.276	2.165.764	2,0%	37,1%
7 Germany	16.373.048	13.800.454	24.813.499	3,0%	18,6%	1.332.536	1.050.308	1.673.051	1,6%	26,9%	1.125.126	896.586	1.380.774	0,5%	25,5%
Hong Kong	13.172.887	13.768.784	29.343.612	2,4%	-4,3%	2.462.317	2.783.695	3.247.842	3,0%	-11,5%	6.971.380	7.300.062	8.081.740	2,8%	-4,5%
8 Hungary	9.454.546	9.780.872	9.746.052	1,7%	-3,3%	813.736	770.427	667.168	1,0%	5,6%	682.673	673.787	618.870	0,3%	1,3%
9 South Korea	7.498.288	20.849.488	11.676.718	1,4%	-64,0%	727.644	2.003.984	1.138.747	0,9%	-63,7%	857.922	2.528.925	2.440.586	0,3%	-66,1%
10 Taiwan	7.135.316	6.525.616	8.473.921	1,3%	9,3%	1.374.455	1.483.915	1.992.585	1,7%	-7,4%	4.460.756	4.436.737	4.560.170	1,8%	0,5%
11 Slovakia	6.185.978	3.560.877	950.632	1,1%	73,7%	408.690	219.145	47.316	0,5%	86,5%	390.468	221.692	64.106	0,2%	76,1%
12 Tunisia	5.465.474	4.569.320	2.953.126	1,0%	19,6%	356.287	293.206	197.968	0,4%	21,5%	516.227	445.200	304.756	0,2%	16,0%
13 Norway	5.374.905	3.919.570	3.773.250	1,0%	37,1%	366.511	267.189	209.190	0,4%	37,2%	259.103	189.277	151.486	0,1%	36,9%
14 Switzerland	5.228.530	1.863.368	1.366.964	1,0%	180,6%	1.099.518	396.780	434.088	1,3%	177,1%	2.648.078	1.550.083	1.652.774	1,1%	70,8%
15 Uruguay	4.968.837	4.708.861	2.704.655	0,9%	5,5%	600.143	559.725	421.289	0,7%	7,2%	2.279.081	2.109.742	1.560.535	0,9%	8,0%
16 Indonesia	4.814.064	2.303.956	9.220.869	0,9%	108,9%	746.211	287.223	753.277	0,9%	159,8%	1.047.907	216.271	586.152	0,4%	384,5%
17 India	4.086.200	3.112.562	5.671.899	0,7%	31,3%	1.110.561	584.446	536.927	1,4%	90,0%	3.146.029	1.801.976	1.939.486	1,3%	74,6%
18 Netherlands	3.689.396	4.110.688	5.738.828	0,7%	-10,2%	366.660	422.781	467.082	0,4%	-13,3%	362.585	408.906	427.709	0,1%	-11,3%
19 Bangladesh	3.568.128	885.143	609	0,7%	303,1%	246.317	66.889	26	0,3%	268,2%	324.300	110.062	30	0,1%	194,7%
20 Turkey	3.518.468	2.212.065	99.693	0,6%	59,1%	10.951	62.106	12.008	0,01%	-82,4%	11.324.474	4.582.498	9.953	4,6%	147,1%
21 Cambodia	3.466.180	1.381.227	860.423	0,6%	150,9%	84.640	122.336	37.535	0,1%	-30,8%	6.397.571	742.934	39.287	2,6%	761,1%
22 Spain	3.325.257	3.860.643	2.144.339	0,6%	-13,9%	901.688	1.050.775	703.432	1,1%	-14,2%	2.353.518	3.105.036	1.885.898	0,9%	-24,2%
23 Poland	2.697.262	2.716.296	4.203.547	0,5%	-0,7%	243.032	251.151	366.508	0,3%	-3,2%	205.659	202.266	305.732	0,1%	1,7%
24 Portugal	2.576.812	2.132.499	1.910.667	0,5%	20,8%	210.989	207.235	155.545	0,3%	1,8%	319.395	542.928	351.239	0,1%	-41,2%
25 Argentina	2.487.403	5.334.545	4.219.856	0,5%	-53,4%	153.840	373.168	340.409	0,2%	-58,8%	191.310	422.793	328.240	0,1%	-54,8%
26 Malaysia	2.434.226	2.158.842	2.651.642	0,4%	12,8%	216.653	166.849	181.219	0,3%	29,8%	188.476	132.179	150.516	0,1%	42,6%
27 Nigeria	2.104.815	793.811	380.898	0,4%	165,2%	0	0	7.699	0,0%	-	7.338.200	2.614.596	733.097	3,0%	180,7%
28 Canada	1.845.096	1.682.285	1.999.986	0,3%	9,7%	117.837	100.654	119.159	0,1%	17,1%	146.972	93.208	109.955	0,1%	57,7%
29 Colombia	1.724.804	496.179	617.519	0,3%	247,6%	286.648	45.633	48.574	0,3%	528,2%	864.758	138.814	115.366	0,3%	523,0%
30 France	1.589.086	1.945.251	2.409.742	0,3%	-18,3%	69.617	85.986	93.472	0,1%	-19,0%	103.419	124.559	150.419	0,04%	-17,0%
Others (2024: +35 countries)	13.237.247	16.246.636	17.950.726	2,4%	-18,5%	1.428.209	1.551.859	1.702.406	1,7%	-8,0%	8.768.241	4.331.410	3.488.061	3,5%	102,4%
Total	548.354.404	465.954.698	551.493.892		17,7%	82.002.426	64.977.976	60.180.728		26,2%	248.641.408	174.383.123	140.901.940		42,6%

■ ANALYSIS OF DESTINATIONS

The three main destinations for Brazilian leather show the following information in the first five months of the year:

- China (without HK) maintains a share in value of 30.0% (previously 30.0%) and with 40.3% (40.4%) in area, with increases of 24.6% (+15.6 %) in value and 33.2% (+22.7%) in area.
- The United States also maintains a share of 13.8% (13.8%) in value and 7.0% (7.0%) in area, with drops of 2.7% (-4.0%) in value and 3.3% (-4.1%) in area.
- Italy with a share of 12.0% (11.5%) in value, and 13.6% (13.1%) in area, now with an improvement of 11.4% (+4.4%) in value and 7.9% (+0.3%).

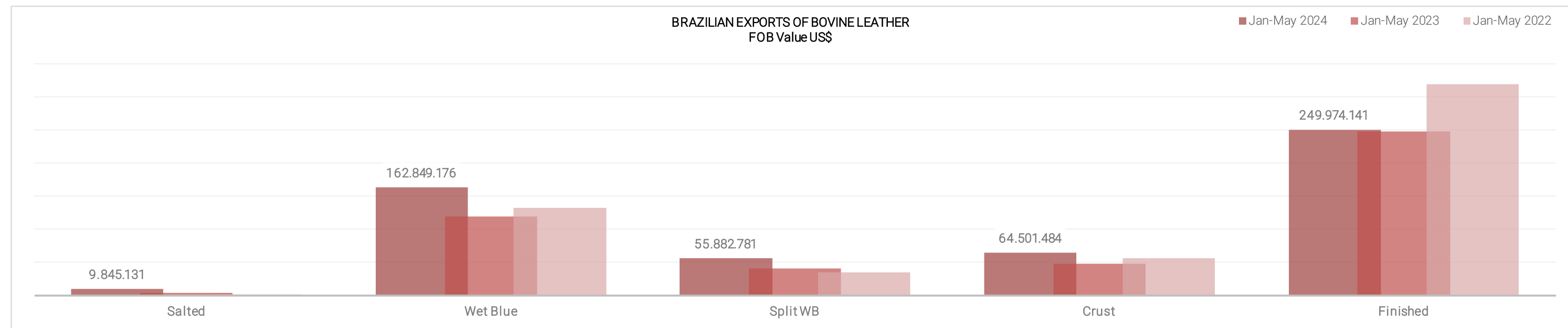
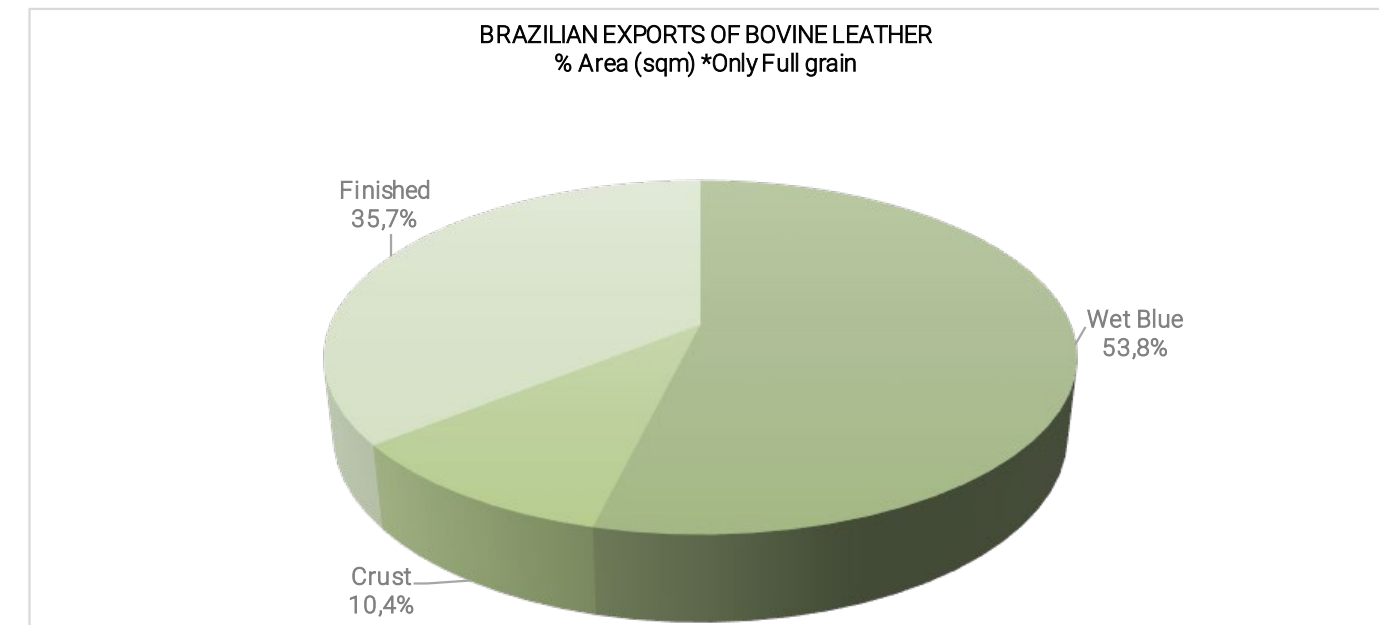
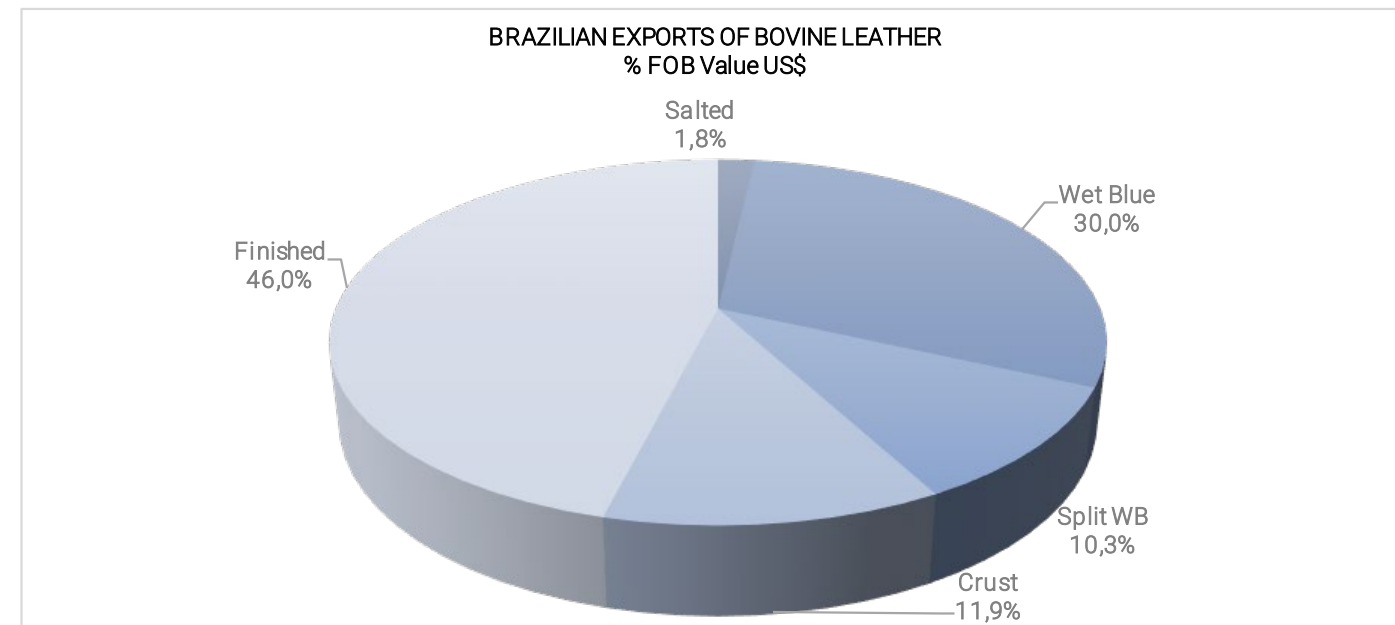
Brazilian exports in May strengthened Italy's participation, being the only one to have an improvement in share among the three main destinations.

China improved its value and volume indexes for imports from Brazil, despite maintaining its share practically unchanged. The United States still has declines in the year, but indexes have been improving and should reach positive levels in the coming months.

This month we will highlight the negative performance among the TOP15, which is due to South Korea, with strong drops in value (-64.0%), area (-63.7%) and weight (-66.1 %).

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-May 2024	Jan-May 2023	Jan-May 2022	2024/2023	2024/2022	Jan-May 2024	Jan-May 2023	Jan-May 2022	2024/2023	2024/2022	Jan-May 2024	Jan-May 2023	Jan-May 2022	2024/2023	2024/2022
Salted	9.845.131	4.320.674	1.471.047	127,9%	569,3%	-	-	-	-	-	31.090.273	9.554.219	2.196.234	225,4%	1315,6%
Wet Blue	162.849.176	119.246.197	132.890.430	36,6%	22,5%	32.945.312	24.088.391	16.967.969	36,8%	94,2%	134.955.253	96.580.428	69.792.700	39,7%	93,4%
Split WB	55.882.781	41.081.230	34.808.734	36,0%	60,5%	20.552.964	15.831.552	16.115.199	29,8%	27,5%	56.531.018	45.340.014	44.386.934	24,7%	27,4%
Crust	64.501.484	47.867.884	56.559.593	34,7%	14,0%	6.383.608	4.176.575	4.140.586	52,8%	54,2%	6.174.909	4.247.362	4.193.442	45,4%	47,3%
Finished	249.974.141	247.837.392	318.570.089	0,9%	-21,5%	21.871.701	20.709.295	22.775.435	5,6%	-4,0%	19.153.528	18.202.199	19.870.113	5,2%	-3,6%
Total	543.052.713	460.353.377	544.299.893	18,0%	-0,2%	81.753.585	64.805.813	59.999.189	26,2%	36,3%	247.904.981	173.924.222	140.439.423	42,5%	76,5%

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

- Wet blue shows a share of 30.0% (29.1%) in value and 53.8% (53.0%) in area, with increases of 36.6% (+26.5%) in value, and 36.8% (+25.8%) in area.
- Split WB with a share of 10.3% (10.5%) in value, with a monetary increase of 36.0% (+36.5%) and 29.8% (+28.4%) in area.
- Crust with a share of 11.9% (12.0%) in value and 10.4% (10.5%) in area, with an increase of 34.7% (+40.1%) and 52, 8% (+62.5%), respectively.

- Finished with 46.0% (46.5%) share in value and 35.7% (36.4%) in area, now with an increase of 0.9% (-0.2%) in value, and of 5.6% (+5.3%) in area.

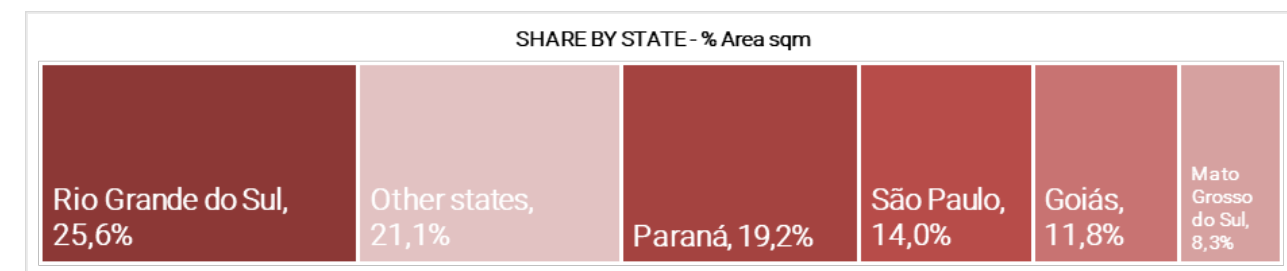
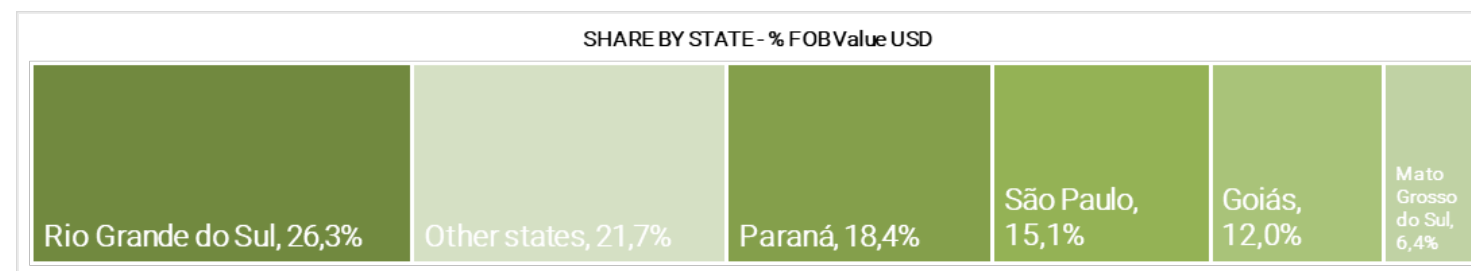
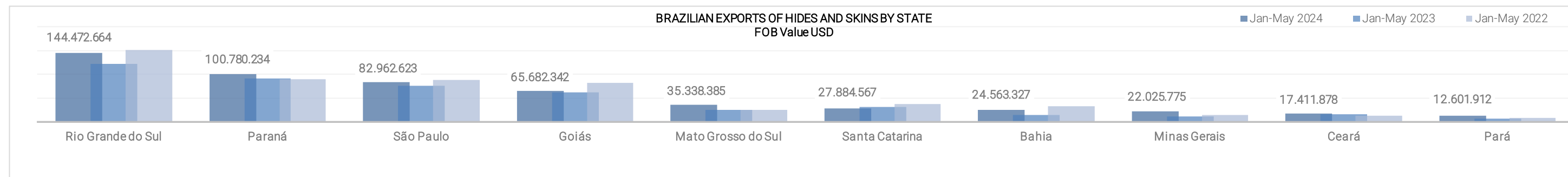
With the 0.9% increase in the value of finished leather, over the same five months in 2023, we now have all types of leather with increases in the year to date.

Crust, despite having double-digit increases in the year, had worsening in its value and volume indexes, with the May results. The other types improved.

Salted hides still indicate increases in shipments, compared to the corresponding month of 2023. However, they show declines compared to the previous month.

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-May 2024	Jan-May 2023	Jan-May 2022	2024	2024/2023		Jan-May 2024	Jan-May 2023	Jan-May 2022	2024	2024/2023		Jan-May 2024	Jan-May 2023	Jan-May 2022	2024	2024/2023	
1 Rio Grande do Sul	144.472.664	121.425.084	150.258.271	26,3%	19,0%	20.980.386	15.233.298	15.974.809	25,6%	37,7%	47.288.241	34.516.660	30.447.358	19,0%	37,0%			
2 Paraná	100.780.234	91.883.331	89.012.277	18,4%	9,7%	15.772.626	13.977.483	10.881.283	19,2%	12,8%	50.405.446	38.902.494	27.297.940	20,3%	29,6%			
3 São Paulo	82.962.623	75.161.478	87.332.061	15,1%	10,4%	11.460.755	9.462.622	8.376.994	14,0%	21,1%	34.651.333	20.228.178	14.903.571	13,9%	71,3%			
4 Goiás	65.682.342	61.767.432	82.668.925	12,0%	6,3%	9.668.918	8.913.171	9.464.921	11,8%	8,5%	31.451.480	27.380.349	26.561.662	12,6%	14,9%			
5 Mato Grosso do Sul	35.338.385	25.321.423	25.891.371	6,4%	39,6%	6.779.619	5.483.824	3.534.713	8,3%	23,6%	22.712.628	19.858.734	12.680.911	9,1%	14,4%			
6 Santa Catarina	27.884.567	32.131.739	38.090.400	5,1%	-13,2%	3.686.353	3.719.486	3.850.426	4,5%	-0,9%	9.174.772	7.525.625	10.323.670	3,7%	21,9%			
7 Bahia	24.563.327	14.393.822	33.067.698	4,5%	70,7%	3.409.407	2.146.908	3.521.354	4,2%	58,8%	9.242.664	3.967.073	5.612.260	3,7%	133,0%			
8 Minas Gerais	22.025.775	11.732.444	14.646.381	4,0%	87,7%	4.103.814	2.211.410	1.872.599	5,0%	85,6%	10.181.136	4.787.778	2.901.432	4,1%	112,6%			
9 Ceará	17.411.878	16.163.117	12.482.724	3,2%	7,7%	1.706.412	1.432.703	863.109	2,1%	19,1%	2.523.639	2.056.079	1.165.576	1,0%	22,7%			
10 Pará	12.601.912	7.260.659	8.080.503	2,3%	73,6%	2.589.689	1.466.434	1.046.993	3,2%	76,6%	13.424.319	7.227.964	5.021.160	5,4%	85,7%			
11 Mato Grosso	5.860.353	2.498.941	4.205.575	1,1%	134,5%	1.075.083	534.751	530.783	1,3%	101,0%	4.402.481	1.824.870	2.130.798	1,8%	141,2%			
12 Amazonas	1.930.629	0	747.152	0,4%	-	378.542	0	82.011	0,5%	-	1.947.730	0	418.995	0,8%	-			
13 Rio de Janeiro	1.583.394	2.207.028	2.181.402	0,3%	-28,3%	25.694	67.216	45.663	0,03%	-61,8%	131.488	193.955	30.258	0,1%	-32,2%			
14 Pernambuco	1.556.552	1.099.736	458.031	0,3%	41,5%	50.371	27.131	17.487	0,1%	85,7%	4.495.805	2.231.862	215.592	1,8%	101,4%			
15 Rio Grande do Norte	1.521.687	1.035.960	289.371	0,3%	46,9%	0	0	0	0,0%	-	5.164.330	2.446.130	529.500	2,1%	111,1%			
16 Piauí	816.158	644.551	1.419.703	0,1%	26,6%	43.369	33.245	81.060	0,1%	30,5%	24.610	19.912	45.005	0,01%	23,6%			
17 Rondônia	649.536	81.610	0	0,1%	695,9%	176.507	21.104	0	0,2%	736,4%	642.710	74.680	0	0,3%	760,6%			
18 Maranhão	409.741	273.655	76.418	0,1%	49,7%	51.978	60.060	10.981	0,1%	-13,5%	369.889	133.130	9.453	0,1%	177,8%			
19 Distrito Federal	241.870	324.468	159.228	0,04%	-25,5%	42.850	67.665	25.363	0,1%	-36,7%	213.783	357.065	127.690	0,1%	-40,1%			
20 Espírito Santo	59.589	10.550	12.544	0,01%	464,8%	44	105	113	0,0%	-58,1%	192.915	65	62	0,1%	296692,3%			
21 Not Declared*	1.188	0	1.365	0,000%	-	9	0	66	0,0%	-	9	0	34	0,0%	-			
22 Amapá	0	0	412.492	0,0%	-	0	0	0	0,0%	-	0	0	479.013	0,0%	-			
23 Paraíba	0	37.830	0	0,0%	-100,0%	0	0	0	0,0%	-	0	78.000	0	0,0%	-100,0%			
24 Tocantins	0	499.840	0	0,0%	-100,0%	0	119.360	0	0,0%	-100,0%	0	572.520	0	0,0%	-100,0%			
Total	548.354.404	465.954.698	551.493.892	100,0%	17,7%	82.002.426	64.977.976	60.180.728	100,0%	26,2%	248.641.408	174.383.123	140.901.940	100,0%	42,6%			

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, from January to May, presented the following highlights:

- Among the TOP10, Minas Gerais now becomes the state with the highest growth in value, with +87.7%, followed by Pará (+73.6%) and Bahia (+70.7%). Santa Catarina is the only one still with a negative index for the year.
- The sequence is repeated in volume. Minas Gerais, with +85.6%, also has the biggest increase in area, with +85.6%, followed by Pará (+76.6%) and Bahia (+58.8%). Santa Catarina stabilized the area index, with -0.9%, and should reach a positive level with June results.
- Among the other states, we have significant increases in Rondônia (+695.9% in value and +736.4% in area) and in Mato Grosso (+134.5% in value and +101.0% in area).
- The ranking remains with the same positions in values and volumes.

■ CLOSING REMARKS

Despite the drop compared to the previous month, May exports maintain significant developments in values and volumes compared to the corresponding months of 2023.

Shipments to Italy, which until March showed drops in values and volumes, are now showing improvements in the annual comparison, indicating that the situation, although still quite uncertain on the European continent, is now following a path with more favorable possibilities.

We cannot fail to also comment on the important expansion in shipments to Vietnam, which more than doubled in the year to May, increasing share to 9.9% and approaching the third main market in the ranking.

Despite the strong impact on the main shipments areas of Rio Grande do Sul exports in May due to flooding in the state, by sea, road and air, affecting total exports by around 14%, the Rio Grande do Sul leather sector maintained shipments within the monthly average from 2024, which meant that the share remained practically unchanged until now. The biggest impact was on the state's total imports, which registered drops of more than 41% in the month.