

NOVEMBER 2024

Brazilian exports of Hides and Skins



Brazilian leather



apexBrasil

MINISTÉRIO DO
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E SERVIÇOS

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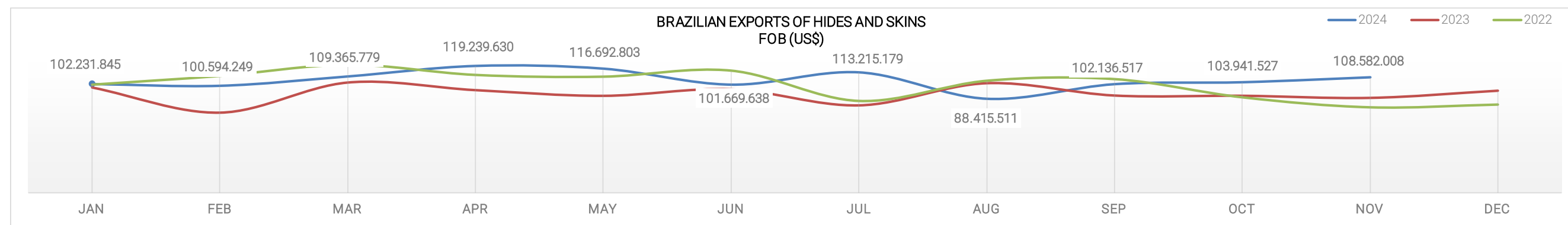
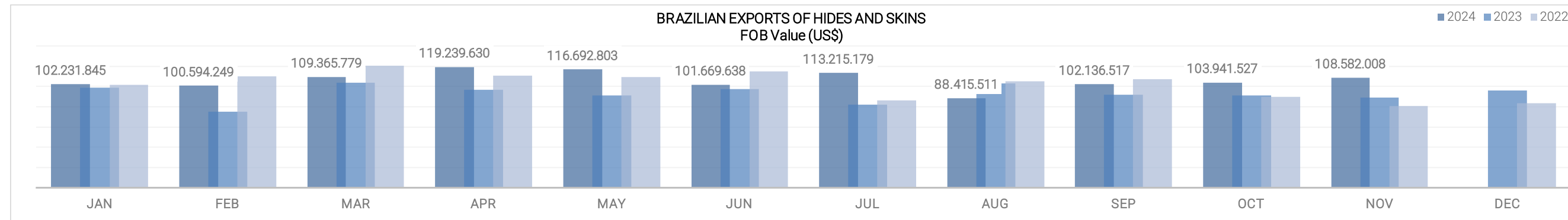
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MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022
JAN	102.231.845	99.097.256	101.697.054	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	100.594.249	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	109.365.779	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	116.692.803	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	113.215.179	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	88.415.511	103.150.225	105.318.890	-21,9%	-14,3%	-16,0%	13.039.334	14.634.581	12.398.155	-21,8%	-10,9%	5,2%	38.318.128	40.916.844	32.250.962	-18,1%	-6,4%	18,8%
SEP	102.136.517	91.485.697	106.870.559	15,5%	11,6%	-4,4%	15.932.394	13.493.620	12.998.266	22,2%	18,1%	22,6%	52.577.394	36.476.373	35.798.746	37,2%	44,1%	46,9%
OCT	103.941.527	91.260.275	89.944.558	1,8%	13,9%	15,6%	16.661.191	13.310.650	11.595.103	4,6%	25,2%	43,7%	52.605.312	36.910.273	30.269.139	0,05%	42,5%	73,8%
NOV	108.582.008	89.258.600	80.665.640	4,5%	21,6%	34,6%	18.888.816	13.305.461	10.767.130	13,4%	42,0%	75,4%	59.837.325	36.828.021	30.454.895	13,7%	62,5%	96,5%
DEC	96.045.932	83.228.588						14.526.060	10.904.167					41.534.604	30.498.876			
Total	1.166.084.686	1.116.751.780	1.218.838.305		14,2%	2,7%	178.924.390	158.963.267	140.749.731		23,9%	37,8%	547.674.456	430.611.610	354.537.869		40,8%	69,0%

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 reported by CICB, referring to the month of November 2024, registered a value of US\$ 108.6 million, representing increases of 4.5% over the previous month, and 21.6% over the same month last year, when US\$ 89.3 million were exported.

Considering volume, 18.9 million square meters and 59.8 thousand tons were shipped, which meant, respectively, increases of 42.0% and 62.5% over the same month in 2023. Compared to October, there was also increases of 13.4% in area and 13.7% in weight.

The period from January to November totaled US\$ 1.17 billion, 14.2% above the same period in 2023, with increases also of 23.9% in area and 40.8% in weight.

COUNTRIES	FOB VALUE (US\$)			Share	Δ	AREA (sqm)			Share	Δ	WEIGHT (KG)		
	Jan-Nov 2024	Jan-Nov 2023	Jan-Nov 2022	2024	2024/2023	Jan-Nov 2024	Jan-Nov 2023	Jan-Nov 2022	2024	2024/2023	Jan-Nov 2024	Jan-Nov 2023	Jan-Nov 2022
1 China + Hong Kong	392.784.111	318.186.228	314.146.345	33,7%	23,4%	80.573.347	61.196.517	46.858.014	45,0%	31,7%	262.042.636	185.985.435	133.601.344
China	370.679.631	286.008.426	257.847.237	31,8%	29,6%	76.500.988	55.166.310	39.574.409	42,8%	38,7%	250.849.727	170.026.696	114.723.939
2 United States	156.056.465	166.037.186	209.187.975	13,4%	-6,0%	11.953.801	12.521.876	13.871.095	6,7%	-4,5%	11.204.174	11.010.725	12.047.749
3 Italy	137.084.383	125.502.481	193.385.352	11,8%	9,2%	23.896.158	21.908.144	25.127.936	13,4%	9,1%	76.544.852	70.494.205	85.769.706
4 Vietnam	121.383.909	67.892.407	59.974.768	10,4%	78,8%	24.424.859	13.399.874	10.815.689	13,7%	82,3%	59.615.554	32.739.118	26.489.783
5 Mexico	63.680.613	47.456.882	42.105.197	5,5%	34,2%	6.031.940	4.432.789	2.759.519	3,4%	36,1%	8.072.867	6.023.815	2.945.146
6 Thailand	37.987.240	38.058.363	43.246.506	3,3%	-0,2%	4.949.998	4.015.120	3.200.357	2,8%	23,3%	12.245.546	6.987.563	5.297.064
7 Germany	33.956.843	30.824.882	46.886.953	2,9%	10,2%	2.805.655	2.407.979	3.193.751	1,6%	16,5%	2.408.532	2.039.532	2.641.486
Hong Kong	22.104.480	32.177.802	56.299.108	1,9%	-31,3%	4.072.359	6.030.207	7.283.605	2,3%	-32,5%	11.192.909	15.958.739	18.877.405
8 Hungary	16.799.214	16.926.950	22.113.544	1,4%	-0,8%	1.500.458	1.395.543	1.488.164	0,8%	7,5%	1.250.251	1.193.113	1.356.697
9 Sout Korea	15.576.608	46.092.928	24.880.091	1,3%	-66,2%	1.464.237	4.378.430	2.418.507	0,8%	-66,6%	1.512.097	5.411.185	4.766.333
10 Taiwan	13.374.232	13.394.498	17.611.281	1,1%	-0,2%	2.788.846	3.046.829	4.339.754	1,6%	-8,5%	9.158.369	8.676.119	11.033.442
11 Uruguay	13.078.606	11.269.599	8.191.884	1,1%	16,1%	1.645.175	1.427.750	1.429.753	0,9%	15,2%	5.541.076	4.622.707	4.081.771
12 Slovakia	12.849.742	8.086.451	3.199.564	1,1%	58,9%	889.877	523.078	162.422	0,5%	70,1%	815.129	502.164	202.605
13 Tunisia	11.005.438	10.623.709	8.217.380	0,9%	3,6%	716.657	667.837	516.269	0,4%	7,3%	1.064.126	1.035.457	817.463
14 Indonesia	10.963.368	3.268.548	17.104.856	0,9%	235,4%	1.815.923	414.843	1.494.611	1,0%	337,7%	3.230.363	312.478	1.168.146
15 Norway	10.309.175	8.490.334	12.704.393	0,9%	21,4%	708.911	589.663	735.247	0,4%	20,2%	509.595	413.952	523.057
16 Spain	9.068.597	9.920.257	4.950.074	0,8%	-8,6%	2.079.989	2.389.012	1.644.647	1,2%	-12,9%	5.318.168	6.495.922	4.684.333
17 Nigeria	8.523.705	2.897.757	1.758.826	0,7%	194,1%	0	0	7.699	0,0%	#DIV/0!	27.306.159	9.135.965	4.266.764
18 India	8.055.807	6.716.379	11.773.806	0,7%	19,9%	1.948.138	1.489.220	1.344.579	1,1%	30,8%	5.575.438	4.903.163	4.746.210
19 Netherlands	7.621.984	8.054.893	9.804.778	0,7%	-5,4%	782.200	827.612	821.749	0,4%	-5,5%	755.900	794.423	806.742
20 Bangladesh	7.527.469	3.405.431	534.311	0,6%	121,0%	567.385	245.657	32.179	0,3%	131,0%	868.898	344.813	40.449
21 Cambodia	6.776.658	2.921.449	1.592.937	0,6%	132,0%	280.000	230.178	69.970	0,2%	21,6%	10.250.310	1.825.046	89.642
22 Switzerland	6.459.156	5.621.197	2.889.151	0,6%	14,9%	1.372.437	1.318.061	840.279	0,8%	4,1%	3.381.489	4.227.747	3.381.181
23 Argentina	6.103.173	9.139.367	10.676.393	0,5%	-33,2%	471.649	647.901	833.615	0,26%	-27,2%	527.372	781.937	820.931
24 Turkey	5.637.918	5.256.550	1.079.749	0,5%	7,3%	25.431	97.796	30.029	0,0%	-74,0%	18.997.433	11.649.069	1.699.536
25 Malaysia	5.321.341	4.045.924	7.634.550	0,5%	31,5%	469.969	309.245	520.897	0,3%	52,0%	404.753	248.001	423.728
26 Portugal	4.668.990	4.529.749	4.035.178	0,4%	3,1%	409.912	415.493	342.698	0,2%	-1,3%	760.705	909.179	764.333
27 Poland	4.517.219	4.759.717	8.412.986	0,4%	-5,1%	400.444	427.628	763.069	0,2%	-6,4%	336.277	358.389	634.581
28 Colombia	4.492.863	2.155.510	1.450.233	0,4%	108,4%	738.787	301.402	133.837	0,4%	145,1%	2.555.409	1.144.375	339.137
29 France	4.025.824	4.400.855	4.096.239	0,3%	-8,5%	187.571	187.925	160.477	0,1%	-0,2%	275.202	282.791	257.016
30 Canada	3.616.360	3.970.572	4.371.055	0,3%	-8,9%	220.455	244.510	258.450	0,1%	-9,8%	298.314	222.053	241.799
Others (2024: +42 countries)	26.777.675	30.798.795	37.593.362	2,3%	-13,1%	2.804.181	2.979.295	3.630.302	1,6%	-5,9%	14.847.462	8.306.565	8.100.819
Total	1.166.084.686	1.020.705.848	1.135.609.717		14,2%	178.924.390	144.437.207	129.845.564		23,9%	547.674.456	389.077.006	324.038.993

Source: MDIC/SECEX - Prepared by: CICB

■ ANALYSIS OF DESTINATIONS

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

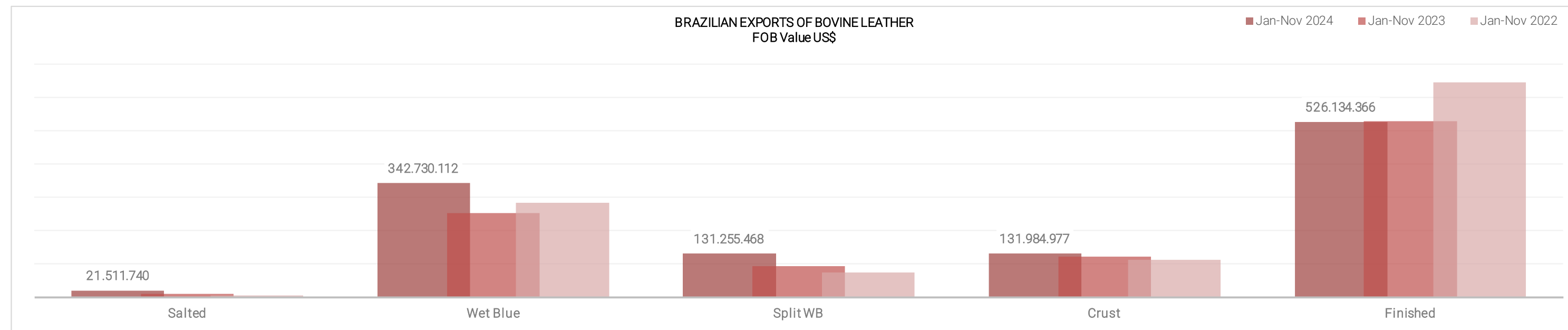
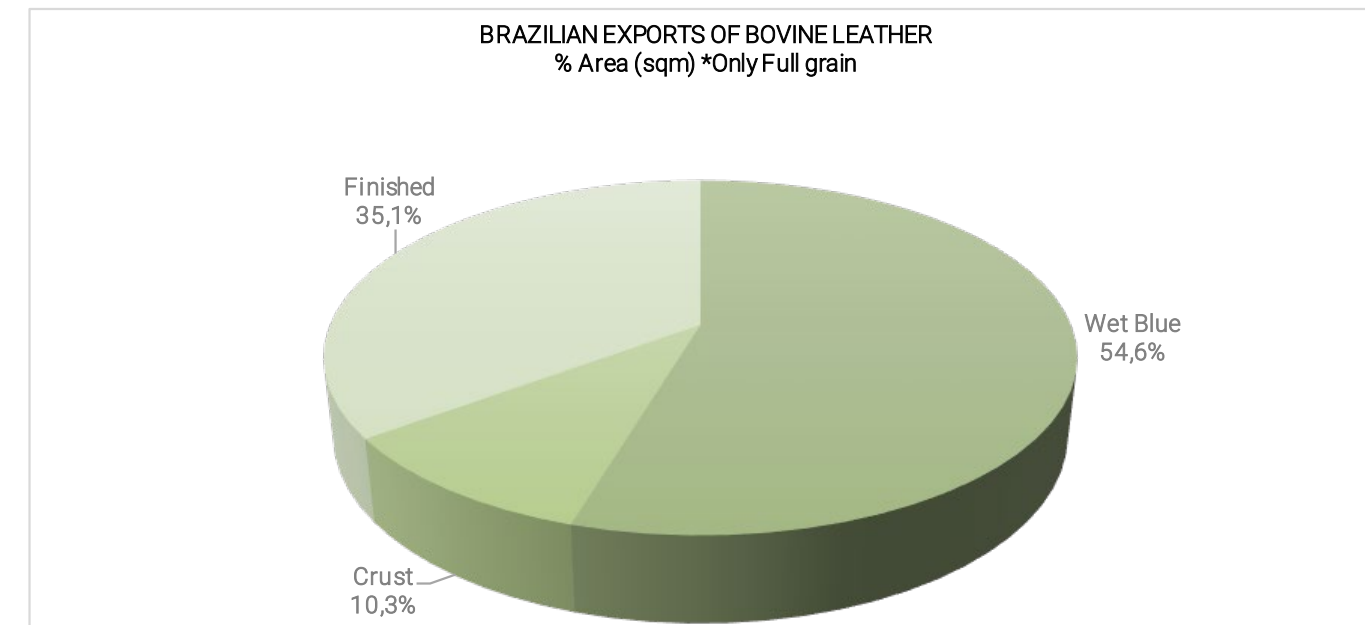
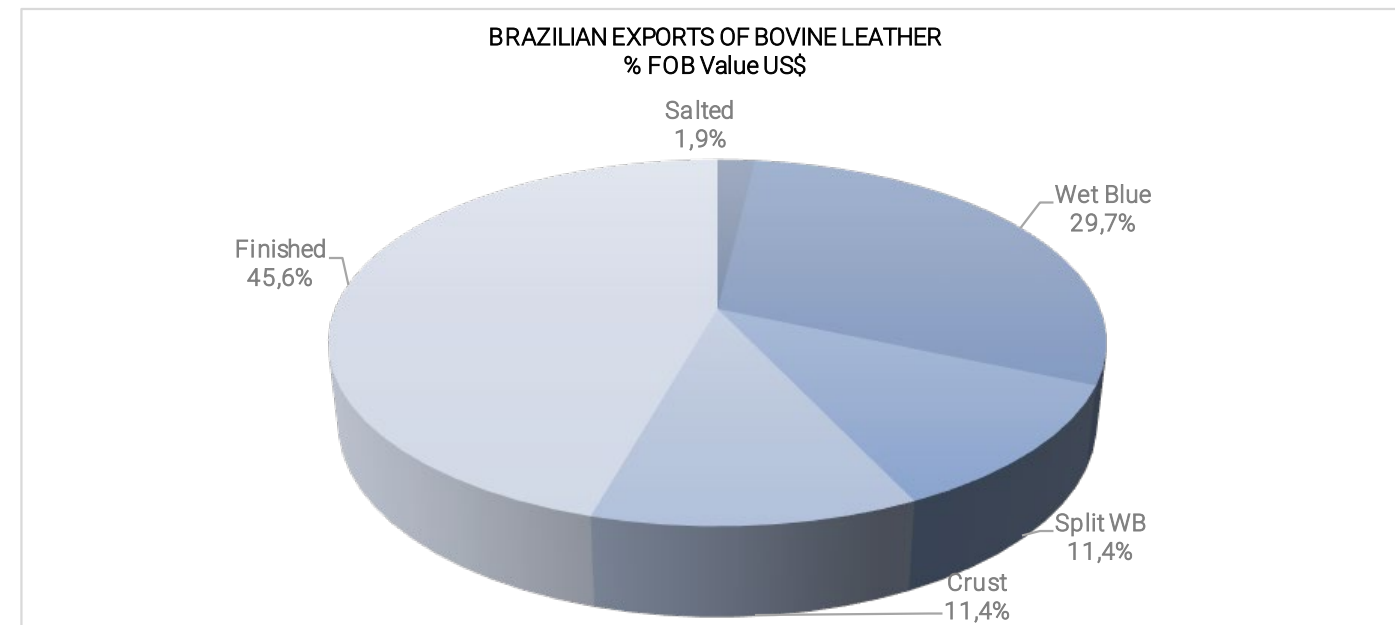
- China (without HK) has a share in value of 31.8% (previously 31.4%) and 42.8% (42.1%) in area, with increases of 29.6% (+28.0%) in value and 38.7% (+34.5%) in area;
- United States with a share of 13.4% (13.6%) in value and 6.7% (6.9%) in area, with drops of 6.0% (-6.6%) in value and 4.5% (-5.4%) in area;
- Italy with a share of 11.8% (11.6%) in value and 13.4% (13.2%) in area, with increases of 9.2% (+5.7%) in value and 9.1% (+3.7%) in area;

China and Italy saw important improvements in purchasing indexes from Brazil, compared to the previous month. The United States remained practically stable, and should end the year with the drops accumulated so far.

Among the TOP10 leather destinations, Vietnam continues to show the biggest evolution of the year, despite reducing the pace in November: +78.8% (+88.2%) in value and +82.3% (+91.9 %) in area. South Korea had a slight improvement, but continues to be the worst performance for Brazil this year: -66.2% (-67.7%) in value and -66.6% (-67.6%) in area.

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Nov 2024	Jan-Nov 2023	Jan-Nov 2022	2024/2023	2024/2022	Jan-Nov 2024	Jan-Nov 2023	Jan-Nov 2022	2024/2023	2024/2022	Jan-Nov 2024	Jan-Nov 2023	Jan-Nov 2022	2024/2023	2024/2022
Salted	21.511.740	10.737.638	5.346.676	100,3%	302,3%	-	-	-	-	-	67.435.234	26.062.294	9.794.751	158,7%	588,5%
Wet Blue	342.730.112	251.748.180	282.810.124	36,1%	21,2%	72.354.283	52.243.326	40.876.681	38,5%	77,0%	294.391.620	210.657.876	172.124.913	39,7%	71,0%
Split WB	131.255.468	94.646.552	75.608.847	38,7%	73,6%	45.969.118	35.690.195	32.743.934	28,8%	40,4%	130.622.012	101.509.948	91.528.625	28,7%	42,7%
Crust	131.984.977	122.575.920	112.702.561	7,7%	17,1%	13.588.801	11.288.975	8.447.781	20,4%	60,9%	13.148.937	10.899.794	8.621.001	20,6%	52,5%
Finished	526.134.366	527.946.244	644.965.004	-0,3%	-18,4%	46.470.312	44.801.367	47.070.658	3,7%	-1,3%	40.600.540	39.013.450	41.005.302	4,1%	-1,0%
Total	1.153.616.663	1.007.654.534	1.121.433.212	14,5%	2,9%	178.382.514	144.023.863	129.139.054	23,9%	38,1%	546.198.343	388.143.362	323.074.592	40,7%	69,1%

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

- Wet blue has a share of 29.7% (29.4%) in value and 54.6% (53.7%) in area, with increases of 36.1% (+35.4%) in value, and also 38.5% (+35.4%) in area;

- Split WB now with a share of 11.4% (11.1%) in value, with a monetary increase of 38.7% (+36.4%) and 28.8% (+26.3%) in area ;

- Crust with a share of 11.4% (11.6%) in value and 10.3% (10.5%) in area, with increases of 7.7% (+10.0%) and 20.4% (+24.0%), respectively;

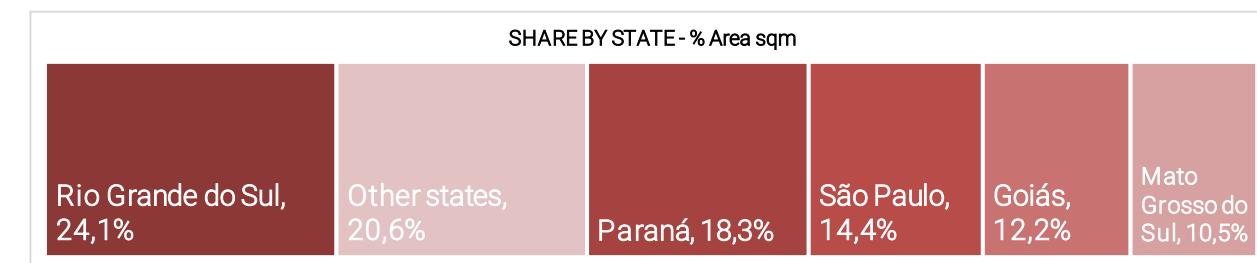
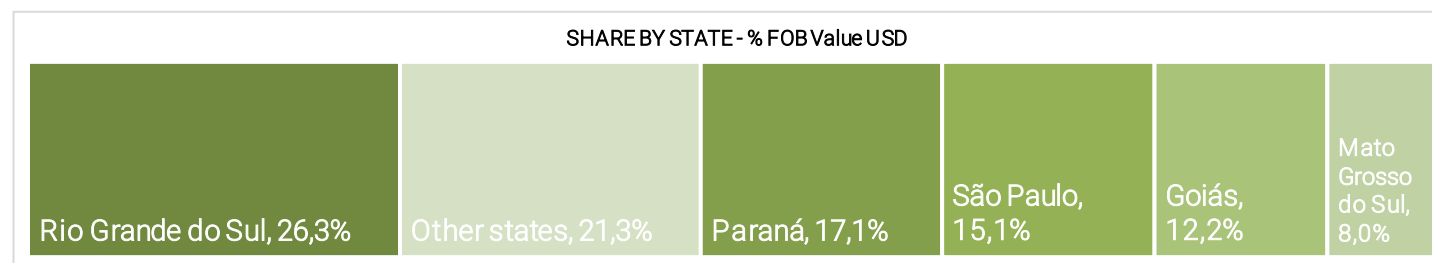
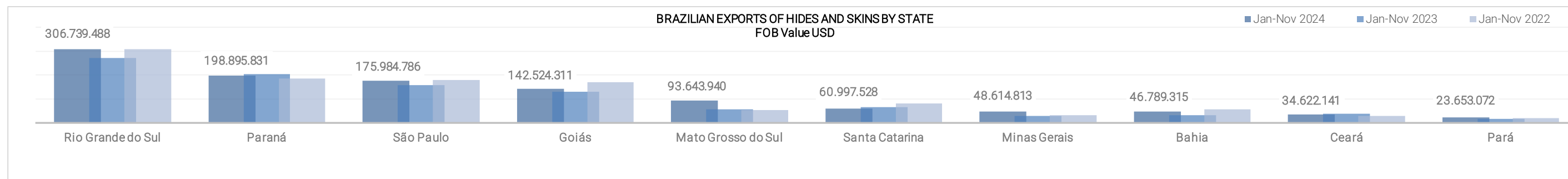
- Finished with 45.6% (46.0%) share in value and 35.1% (35.9%) in area, with a slight reduction of 0.3% (-1.3%) in value, however, increase of 3.7% (+2.9%) in area.

This month, crust leather saw declines compared to the previous month and also year-on-year, while other leather types saw double-digit growth, particularly wet blue and split wb.

Salted hides have slowed their growth rate, however, year-to-date, they still have twice the value of last year and almost triple the weight.

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-Nov 2024	Jan-Nov 2023	Jan-Nov 2022	2024	2024/2023		Jan-Nov 2024	Jan-Nov 2023	Jan-Nov 2022	2024	2024/2023		Jan-Nov 2024	Jan-Nov 2023	Jan-Nov 2022	2024	2024/2023	
1 Rio Grande do Sul	306.739.488	270.124.881	308.393.910	26,3%	13,6%	43.059.336	33.846.486	32.655.687	24,1%	27,2%	100.749.964	74.785.728	61.944.001	18,4%	34,7%			
2 Paraná	198.895.831	202.751.443	186.418.514	17,1%	-1,9%	32.785.246	32.357.985	24.682.732	18,3%	1,3%	104.203.209	90.452.780	66.273.101	19,0%	15,2%			
3 São Paulo	175.984.786	156.801.014	179.726.351	15,1%	12,2%	25.677.357	19.535.875	17.915.637	14,4%	31,4%	71.241.227	41.796.193	34.947.599	13,0%	70,4%			
4 Goiás	142.524.311	129.119.211	169.832.143	12,2%	10,4%	21.810.906	18.792.034	19.821.131	12,2%	16,1%	71.530.071	57.009.527	56.406.851	13,1%	25,5%			
5 Mato Grosso do Sul	93.643.940	55.640.446	53.410.708	8,0%	68,3%	18.768.275	11.953.964	8.205.042	10,5%	57,0%	64.880.153	41.669.510	30.959.526	11,8%	55,7%			
6 Santa Catarina	60.997.528	66.043.416	80.473.706	5,2%	-7,6%	8.554.880	8.089.375	9.067.485	4,8%	5,8%	20.903.570	16.931.811	25.658.300	3,8%	23,5%			
7 Minas Gerais	48.614.813	30.042.440	31.470.086	4,2%	61,8%	9.040.988	5.556.142	3.958.249	5,1%	62,7%	21.868.804	10.823.259	7.330.346	4,0%	102,1%			
8 Bahia	46.789.315	31.655.367	56.735.739	4,0%	47,8%	6.355.453	4.493.652	7.012.034	3,6%	41,4%	18.734.585	9.476.307	12.021.877	3,4%	97,7%			
9 Ceará	34.622.141	38.649.701	29.487.311	3,0%	-10,4%	3.411.299	3.768.750	2.006.949	1,9%	-9,5%	5.496.348	5.658.021	2.877.774	1,0%	-2,9%			
10 Pará	23.653.072	17.633.692	20.177.575	2,0%	34,1%	5.199.363	3.749.810	2.994.104	2,9%	38,7%	26.786.088	18.182.469	15.074.193	4,9%	47,3%			
11 Mato Grosso	13.567.841	6.483.400	6.945.962	1,2%	109,3%	2.675.436	1.372.002	1.025.598	1,5%	95,0%	10.744.779	4.845.667	3.589.306	2,0%	121,7%			
12 Rio de Janeiro	4.820.044	5.490.176	4.672.704	0,4%	-12,2%	77.452	210.774	73.921	0,04%	-63,3%	235.045	505.018	43.003	0,04%	-53,5%			
13 Pernambuco	3.752.752	2.597.331	1.206.949	0,3%	44,5%	63.623	40.362	34.458	0,04%	57,6%	10.894.076	6.235.490	1.995.584	2,0%	74,7%			
14 Amazonas	3.365.064	331.183	747.152	0,3%	916,1%	695.467	62.272	82.011	0,4%	1016,8%	3.507.230	310.737	418.995	0,6%	1028,7%			
15 Rio Grande do Norte	3.294.511	3.146.297	1.440.648	0,3%	4,7%	0	0	0	0,0%	-	11.073.060	7.751.890	2.774.700	2,0%	42,8%			
16 Piauí	1.680.810	1.560.659	2.753.456	0,1%	7,7%	86.700	80.431	157.241	0,0%	7,8%	104.628	46.003	97.313	0,02%	127,4%			
17 Maranhão	1.261.857	575.079	167.162	0,1%	119,4%	302.250	94.032	23.032	0,2%	221,4%	1.706.392	247.458	19.028	0,3%	589,6%			
18 Rondônia	1.186.285	202.813	0	0,1%	484,9%	317.158	47.554	0	0,2%	566,9%	1.153.911	181.431	0	0,2%	536,0%			
19 Distrito Federal	241.870	585.874	597.159	0,02%	-58,7%	42.850	120.659	104.591	0,02%	-64,5%	213.783	641.495	522.840	0,04%	-66,7%			
20 Espírito Santo	226.834	13.942	29.061	0,02%	1527,0%	342	135	277	0,0%	153,3%	605.974	82	157	0,1%	738892,7%			
21 Alagoas	140.481	0	0	0,01%	-	0	0	0	0,00%	-	748.100	0	0	0,1%	-			
22 Amapá	65.026	31.371	789.945	0,01%	107,3%	0	0	0	0,0%	-	210.500	131.000	953.255	0,04%	60,7%			
23 Paraíba	14.898	52.191	0	0,001%	-71,5%	0	0	0	0,0%	-	82.950	106.000	0	0,02%	-21,7%			
24 Not declared*	1.188	0	1.365	0,0%	-	9	0	66	0,0%	-	9	0	34	0,0%	-			
25 Tocantins	0	1.173.921	132.111	0,0%	-100,0%	0	264.913	25.319	0,0%	-100,0%	0	1.289.130	131.210	0,0%	-100,0%			
Total	1.166.084.686	1.020.705.848	1.135.609.717	100,0%	14,2%	178.924.390	144.437.207	129.845.564	100,0%	23,9%	547.674.456	389.077.006	324.038.993	100,0%	40,8%			

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 November, presented the following highlights:

- Among the TOP10, monetary drops occurred in the states of Ceará (-10.4%), Santa Catarina (-7.6%) and Paraná (-1.9%). The biggest increases are in Mato Grosso do Sul (+68.3%), Minas Gerais (+61.8%) and Bahia (+47.8%).
- Considering the traded area, only Ceará has a reduction, with -9.5%. The other states in the TOP10 show growth, with emphasis on Minas Gerais, with +62.7%.

The highlight this year continues to be Mato Grosso, in 11th place, which doubles its exports in value, approaching the double also in area;

The ranking of states keeps Rio Grande do Sul first in value and area, with Paraná leading in weight. Goiás surpassed São Paulo in weight, now placing third.

■ CLOSING REMARKS

Brazilian exports of hides and skins reached high volumes in November, recording the largest weight shipped in a month, and also the largest area since May 2017.

These higher volumes coincide with the growth in the share of wet blue leather in total exports, rising from 48.5% in 2023, to 54.6% in the accumulated area shipped this year. There was also an increase in participation in value, rising from 34.7% to 41.1%.

Considering markets, it is clear that the best developments occur in shipments to Asia. China once again increased its participation in Brazilian exports, with improvements in value and volume indexes, compared to the accumulated until October.

Italy had important growth in imports from Brazil in the year to date, while the United States is expected to close the year with drops in purchases of national leather.

Despite the improvement in sales to Italy, the specialized press reports that November was registered with activity well below what is considered normal in the tanning sector in Europe, mainly in the north of the country.

Some companies are even suspending the receipt of orders, after customers, mainly in the automotive segment, canceled some orders. Some organizations are already preparing to close for an entire month during the Christmas season, when they normally only shut down for 7 to 10 days.