

SEPTEMBER 2024

Brazilian exports of Hides and Skins



Brazilian leather



apexBrasil

MINISTÉRIO DO
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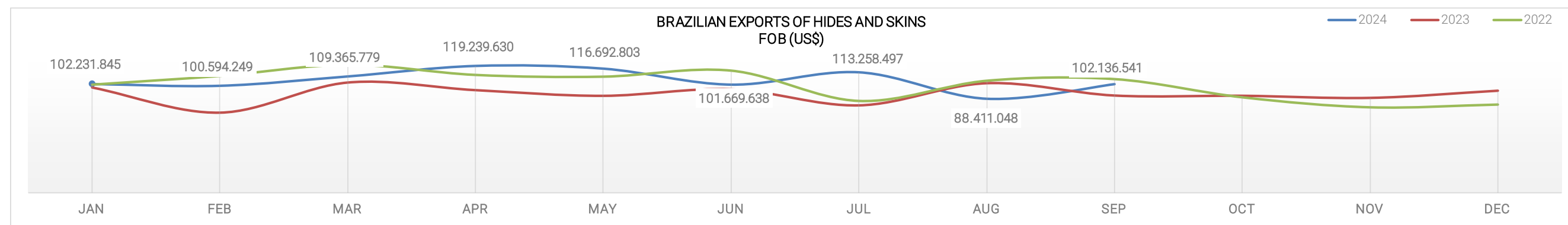
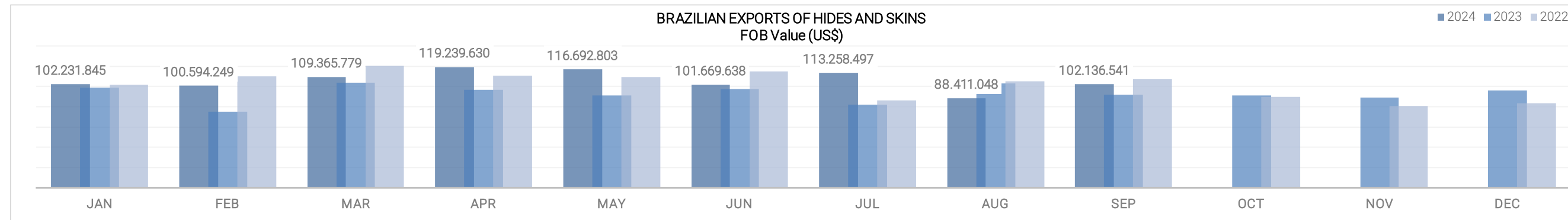
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MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022	2024	2023	2022	MONTH 2024	2024/2023	2024/2022
JAN	102.231.845	99.097.256	101.697.054	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	113.258.497	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	88.411.048	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%	38.318.128	40.916.844	32.250.962	-18,1%	-6,4%	18,8%
SEP	102.136.541	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%	52.577.534	36.476.373	35.798.746	37,2%	44,1%	46,9%
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	953.600.030	1.116.751.780	1.218.838.305		13,5%	-1,2%	143.374.383	158.963.267	140.749.731		21,7%	33,4%	435.231.959	430.611.610	354.537.869		38,0%	65,3%

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 September 2024, registered a value of US\$ 102.1 million, representing increases of 15.5% over the previous month, and 11.6% over the same month last year, when US\$ 91.5 million were exported.

Considering volume, 15.9 million square meters and 52.6 thousand tons were exported, which meant, respectively, increases of 18.1% and 44.1% over the same month in 2023. Compared to August, there was also increases of 22.2% in area and 37.2% in weight.

The period from January to September totaled US\$ 953.6 million, 13.5% above the same period in 2023, with increases also of 21.7% in area and 38.0% 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-Sep 2024	Jan-Sep 2023	Jan-Sep 2022	2024	2024/2023	Jan-Sep 2024	Jan-Sep 2023	Jan-Sep 2022	2024	2024/2023	Jan-Sep 2024	Jan-Sep 2023	Jan-Sep 2022	2024	2024/2023
1 China + Hong Kong	312.795.906	261.808.039	269.117.594	32,8%	19,5%	62.412.270	50.282.327	39.286.501	43,5%	24,1%	200.810.892	152.354.963	108.983.065	46,1%	31,8%
China	293.484.174	235.070.220	220.910.516	30,8%	24,8%	58.724.110	45.286.582	33.421.619	41,0%	29,7%	190.525.011	139.485.511	94.173.736	43,8%	36,6%
2 United States	133.246.797	138.956.083	182.039.707	14,0%	-4,1%	10.193.195	10.518.306	11.924.848	7,1%	-3,1%	9.072.944	9.245.156	10.299.514	2,1%	-1,9%
3 Italy	113.219.265	103.011.992	163.520.348	11,9%	9,9%	19.399.909	17.838.430	20.319.434	13,5%	8,8%	62.006.502	57.835.662	68.473.026	14,2%	7,2%
4 Vietnam	98.340.328	50.366.589	50.464.936	10,3%	95,2%	19.725.980	9.877.057	8.909.850	13,8%	99,7%	47.671.584	23.468.737	21.738.795	11,0%	103,1%
5 Mexico	50.261.904	37.373.147	33.285.303	5,3%	34,5%	4.844.055	3.558.274	1.981.824	3,4%	36,1%	6.717.194	4.915.482	1.938.623	1,5%	36,7%
6 Thailand	32.069.838	31.952.248	35.452.384	3,4%	0,4%	4.072.160	3.295.082	2.593.457	2,8%	23,6%	10.221.438	5.357.992	4.618.674	2,3%	90,8%
7 Germany	25.792.959	25.581.685	41.434.368	2,7%	0,8%	2.109.663	1.974.919	2.813.082	1,5%	6,8%	1.807.303	1.668.202	2.321.542	0,4%	8,3%
Hong Kong	19.311.732	26.737.819	48.207.078	2,0%	-27,8%	3.688.160	4.995.745	5.864.882	2,6%	-26,2%	10.285.881	12.869.452	14.809.329	2,4%	-20,1%
8 Hungary	15.054.341	15.153.043	18.080.292	1,6%	-0,7%	1.332.531	1.228.993	1.210.409	0,9%	8,4%	1.111.215	1.056.610	1.117.695	0,3%	5,2%
9 South Korea	12.573.718	40.608.814	18.766.462	1,3%	-69,0%	1.184.851	3.846.862	1.809.541	0,8%	-69,2%	1.265.253	4.651.261	3.897.809	0,3%	-72,8%
10 Taiwan	11.208.688	11.666.582	14.059.664	1,2%	-3,9%	2.304.355	2.783.640	3.576.106	1,6%	-17,2%	7.463.073	7.881.403	9.043.451	1,7%	-5,3%
11 Indonesia	10.904.368	2.869.641	16.410.192	1,1%	280,0%	1.840.775	358.813	1.423.554	1,3%	413,0%	3.390.957	272.049	1.114.756	0,8%	1146,5%
12 Slovakia	10.549.067	6.209.741	2.411.569	1,1%	69,9%	718.738	395.161	118.373	0,5%	81,9%	666.635	386.267	156.778	0,2%	72,6%
13 Uruguay	10.343.876	9.684.329	6.034.706	1,1%	6,8%	1.310.634	1.190.627	833.855	0,9%	10,1%	4.986.399	3.556.512	3.148.239	1,1%	40,2%
14 Tunisia	9.911.558	9.026.851	6.851.083	1,0%	9,8%	639.348	570.071	424.226	0,4%	12,2%	951.482	879.386	669.275	0,2%	8,2%
15 Norway	8.551.166	6.631.394	11.281.270	0,9%	28,9%	584.668	459.194	647.869	0,4%	27,3%	416.287	321.631	459.571	0,1%	29,4%
16 Spain	7.435.310	7.074.988	3.657.199	0,8%	5,1%	1.756.036	1.779.755	1.206.100	1,2%	-1,3%	4.601.375	5.005.149	3.438.699	1,1%	-8,1%
17 Netherlands	6.606.355	7.401.806	8.926.847	0,7%	-10,7%	661.551	745.273	728.254	0,5%	-11,2%	645.097	722.319	684.799	0,1%	-10,7%
18 India	6.556.087	5.873.405	10.902.690	0,7%	11,6%	1.614.902	1.285.724	1.245.596	1,1%	25,6%	4.651.641	4.257.201	4.373.934	1,1%	9,3%
19 Switzerland	6.487.447	3.710.242	2.388.090	0,7%	74,9%	1.386.797	872.892	725.052	1,0%	58,9%	3.423.272	3.127.111	2.837.851	0,8%	9,5%
20 Bangladesh	6.160.493	1.663.449	319.609	0,6%	270,3%	472.618	121.278	18.782	0,3%	289,7%	746.399	180.490	23.032	0,2%	313,5%
21 Nigeria	5.781.584	2.323.959	1.289.751	0,6%	148,8%	0	0	7.699	0,0%	-	18.667.621	7.209.847	3.161.818	4,3%	158,9%
22 Cambodia	5.390.233	2.406.429	1.426.897	0,6%	124,0%	199.943	189.300	63.606	0,1%	5,6%	9.226.497	1.381.837	82.555	2,1%	567,7%
23 Turkey	5.314.226	4.704.131	833.412	0,6%	13,0%	25.431	73.450	26.833	0,02%	-65,4%	17.531.122	10.046.136	1.282.555	4,0%	74,5%
24 Argentina	4.535.561	8.254.492	8.979.452	0,5%	-45,1%	337.555	586.101	702.418	0,2%	-42,4%	392.871	690.360	698.634	0,1%	-43,1%
25 Poland	4.168.674	4.186.365	7.260.529	0,4%	-0,4%	369.857	382.218	652.203	0,3%	-3,2%	311.966	314.860	542.414	0,1%	-0,9%
26 Portugal	4.156.853	3.709.272	3.335.330	0,4%	12,1%	345.572	343.003	289.853	0,2%	0,7%	560.007	804.675	643.324	0,1%	-30,4%
27 Malaysia	4.000.749	3.659.592	6.475.209	0,4%	9,3%	363.810	280.002	444.222	0,3%	29,9%	309.766	223.917	361.633	0,1%	38,3%
28 France	3.409.428	3.474.812	3.777.839	0,4%	-1,9%	157.772	148.428	148.471	0,1%	6,3%	232.936	223.078	237.090	0,1%	4,4%
29 Canada	3.214.329	3.360.844	3.674.103	0,3%	-4,4%	197.872	204.088	215.155	0,1%	-3,0%	222.682	185.889	204.980	0,1%	19,8%
30 Colombia	3.127.529	1.125.927	1.298.878	0,3%	177,8%	475.751	132.275	124.860	0,3%	259,7%	1.794.880	391.448	314.530	0,41%	358,5%
Others (2024: +41 countries)	22.431.393	26.357.082	31.243.806	2,4%	-14,9%	2.335.784	2.499.553	3.011.298	1,6%	-6,6%	13.354.669	6.723.082	6.446.298	3,1%	98,6%
Total	953.600.030	840.186.973	964.999.519		13,5%	143.374.383	117.821.096	107.483.331		21,7%	435.231.959	315.338.712	263.314.959		38,0%

Source: MDIC/SECEX - Prepared by: CICB

■ ANALYSIS OF DESTINATIONS

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

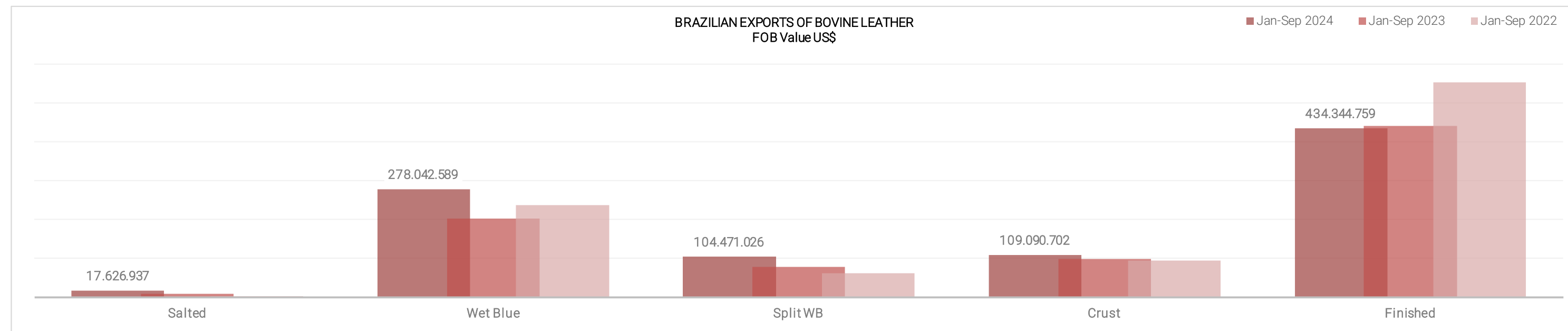
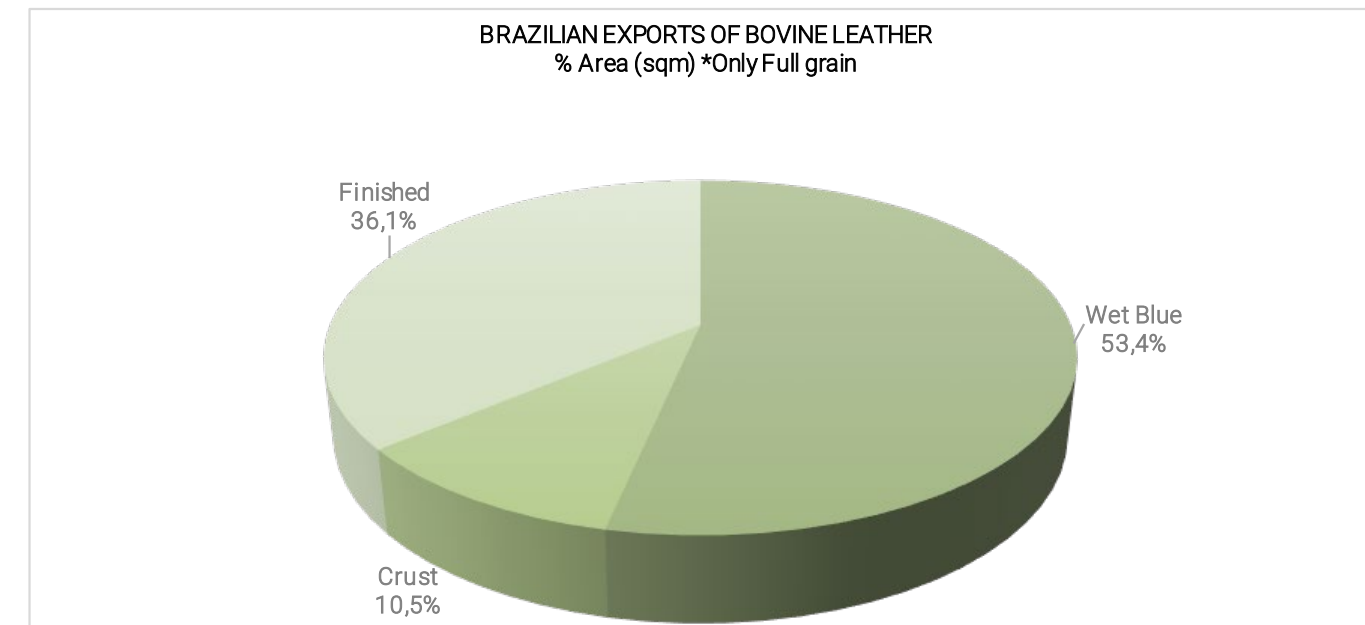
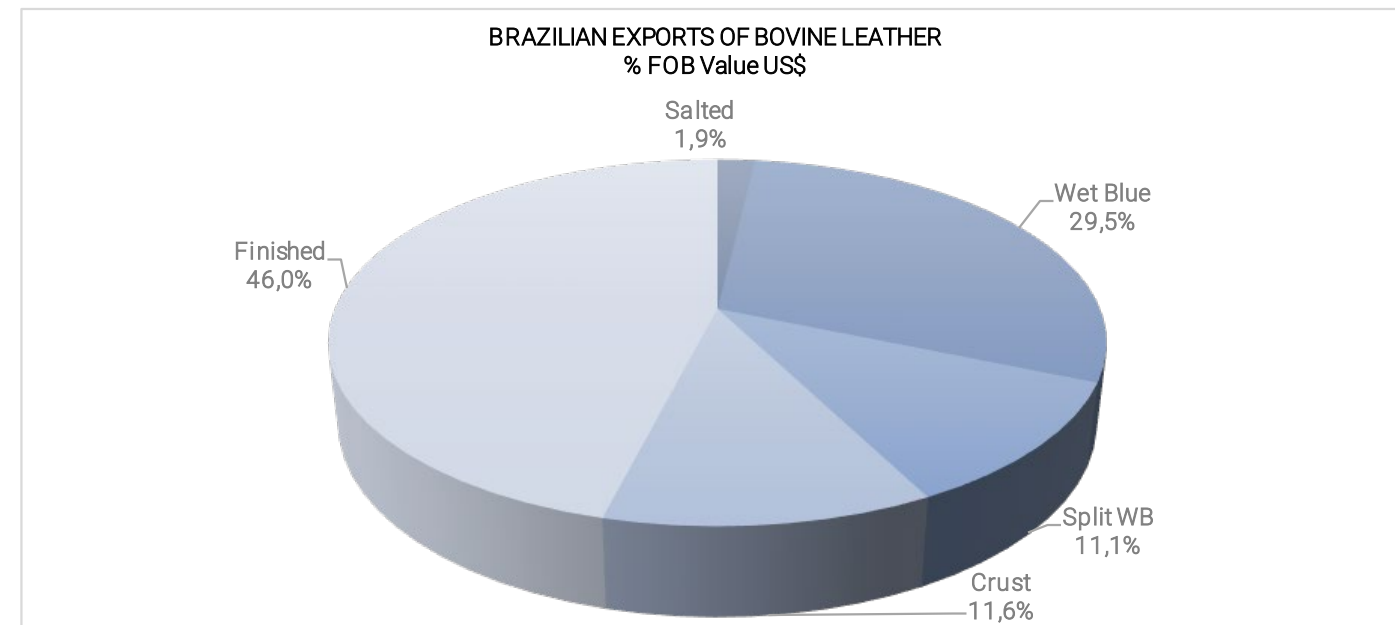
- China (without HK) maintains a share in value of 30.8% (previously 30.8%) and now 41.0% (40.9%) in area, with increases of 24.8% (+26.3 %) in value and 29.7% (+31.8%) in area;
- United States with a share of 14.0% (13.6%) in value and 7.1% (6.9%) in area, with drops of 4.1% (-8.3%) in value and 3.1 (-7.5%) in area;
- Italy with a share of 11.9% (11.6%) in value and 13.5% (13.0%) in area, with increases of 9.9% (+7.4%) in value and 8.8% (+5.2%) in area;

The United States and Italy improved their indexes for Brazilian leather purchases with the September results. China, despite maintaining its participation practically unchanged, had a slight worsening in its indexes.

Among the other TOP10 countries, the positive highlight continues to be exports to Vietnam, with an increase of 95.2% in value and 99.7% in area. The two worst results in the period are for South Korea (-69.0% in value and -69.2% in area) and Hong Kong (-27.8% and -26.2%).

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Sep 2024	Jan-Sep 2023	Jan-Sep 2022	2024/2023	2024/2022	Jan-Sep 2024	Jan-Sep 2023	Jan-Sep 2022	2024/2023	2024/2022	Jan-Sep 2024	Jan-Sep 2023	Jan-Sep 2022	2024/2023	2024/2022
Salted	17.626.937	9.205.426	4.172.670	91,5%	322,4%	-	-	-	-	-	55.137.954	21.487.899	7.461.128	156,6%	639,0%
Wet Blue	278.042.589	203.474.500	237.437.174	36,6%	17,1%	56.702.116	41.833.241	32.571.340	35,5%	74,1%	230.724.245	168.051.181	136.722.843	37,3%	68,8%
Split WB	104.471.026	77.632.113	62.539.098	34,6%	67,0%	36.681.311	29.559.144	27.553.462	24,1%	33,1%	103.867.524	83.849.867	76.284.514	23,9%	36,2%
Crust	109.090.702	99.487.125	95.478.234	9,7%	14,3%	11.178.548	9.020.350	7.086.410	23,9%	57,7%	10.809.499	8.781.538	7.240.192	23,1%	49,3%
Finished	434.344.759	439.858.964	553.357.676	-1,3%	-21,5%	38.343.328	37.083.641	39.955.467	3,4%	-4,0%	33.399.173	32.362.241	34.835.391	3,2%	-4,1%
Total	943.576.013	829.658.128	952.984.852	13,7%	-1,0%	142.905.303	117.496.376	107.166.679	21,6%	33,3%	433.938.395	314.532.726	262.544.068	38,0%	65,3%

Source: MDIC/SECEX - Prepared by: CICB



■ ANALYSIS OF TYPES OF LEATHER

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

- Wet blue shows a share of 29.5% (29.1%) in value and 53.4% (52.7%) in area, with increases of 36.6% (+34.9%) in value, and 35.5% (+33.9%) in area;
- Split WB maintains a share of 11.1% (11.1%) in value, with a monetary increase of 34.6% (+36.7%) and 24.1% (+26.6%) in area;
- Crust with a share of 11.6% (11.7%) in value and 10.5% (10.7%) in area, with increases of 9.7% (+13.9%) and 23.9% (+29.2%), respectively;

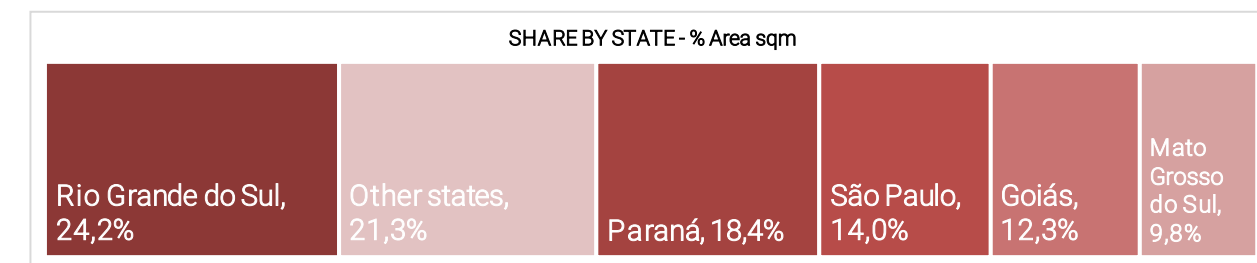
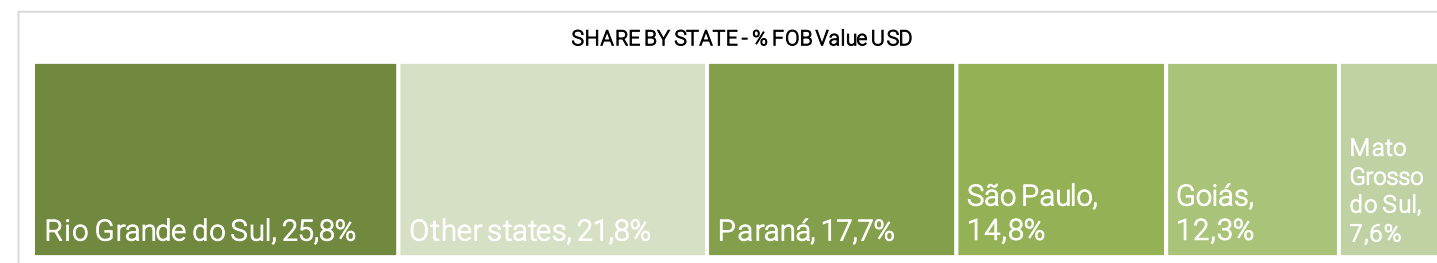
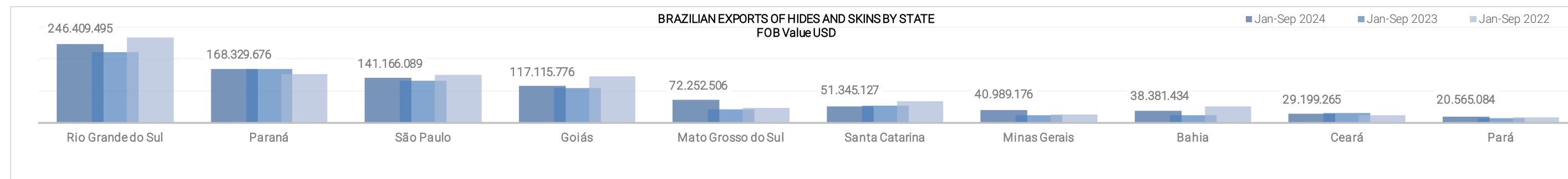
- Finished with 46.0% (+46.2%) share in value and 36.1% (36.6%) in area, with a reduction of 1.3% (-1.2%) in value, however increase of 3.4% (+3.9%) in area.

Wet blue leather returned to shipments above 7 million square meters in September. It was the second largest volume shipped in the year. In terms of value, the recovery was also strong, after falling in August. Finished leather improved over August shipments, despite still being below 4 million square meters.

Salted hides had once again large shipments in September, exceeding the same month in 2023 by three times.

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-Sep 2024	Jan-Sep 2023	Jan-Sep 2022	2024	2024/2023		Jan-Sep 2024	Jan-Sep 2023	Jan-Sep 2022	2024	2024/2023		Jan-Sep 2024	Jan-Sep 2023	Jan-Sep 2022	2024	2024/2023	
1 Rio Grande do Sul	246.409.495	220.674.186	267.005.629	25,8%	11,7%	34.704.063	27.563.468	27.713.088	24,2%	25,9%	80.914.344	61.230.463	52.288.335	18,6%	32,1%			
2 Paraná	168.329.676	168.966.485	152.269.433	17,7%	-0,4%	26.412.130	27.055.303	19.605.722	18,4%	-2,4%	80.923.255	75.114.002	51.230.384	18,6%	7,7%			
3 São Paulo	141.166.089	131.003.097	150.885.325	14,8%	7,8%	20.130.416	15.899.146	14.869.387	14,0%	26,6%	57.915.541	33.421.792	28.606.387	13,3%	73,3%			
4 Goiás	117.115.776	109.774.170	145.242.068	12,3%	6,7%	17.644.224	15.691.153	16.529.647	12,3%	12,4%	56.862.794	46.643.515	46.404.061	13,1%	21,9%			
5 Mato Grosso do Sul	72.252.506	42.376.506	46.021.473	7,6%	70,5%	13.988.141	9.254.774	6.691.190	9,8%	51,1%	47.416.037	32.102.329	24.812.297	10,9%	47,7%			
6 Santa Catarina	51.345.127	54.812.906	67.548.805	5,4%	-6,3%	7.015.407	6.502.539	7.344.584	4,9%	7,9%	17.009.809	13.063.374	20.627.368	3,9%	30,2%			
7 Minas Gerais	40.989.176	24.404.253	27.410.292	4,3%	68,0%	7.634.424	4.495.145	3.449.510	5,3%	69,8%	18.543.000	8.946.409	6.480.806	4,3%	107,3%			
8 Bahia	38.381.434	25.160.114	50.980.431	4,0%	52,5%	5.067.722	3.596.542	5.984.357	3,5%	40,9%	14.961.836	6.846.965	9.864.435	3,4%	118,5%			
9 Ceará	29.199.265	30.039.567	23.592.478	3,1%	-2,8%	2.881.205	2.712.925	1.555.808	2,0%	6,2%	4.584.272	3.823.589	1.867.474	1,1%	19,9%			
10 Pará	20.565.084	15.683.778	17.587.065	2,2%	31,1%	4.338.368	3.328.546	2.556.734	3,0%	30,3%	22.470.637	16.046.630	12.752.606	5,2%	40,0%			
11 Mato Grosso	10.897.082	4.517.846	5.928.466	1,1%	141,2%	2.109.058	1.001.542	762.466	1,5%	110,6%	8.350.677	3.354.707	2.861.176	1,9%	148,9%			
12 Rio de Janeiro	3.558.171	4.023.388	3.686.056	0,4%	-11,6%	52.156	138.072	62.721	0,04%	-62,2%	164.985	325.821	37.921	0,04%	-49,4%			
13 Amazonas	3.410.714	232.400	747.152	0,4%	1367,6%	695.467	47.121	82.011	0,5%	1375,9%	3.507.230	234.310	418.995	0,8%	1396,8%			
14 Pernambuco	3.155.240	2.321.861	1.047.077	0,3%	35,9%	62.743	37.279	34.458	0,04%	68,3%	8.989.815	5.678.635	1.455.014	2,1%	58,3%			
15 Rio Grande do Norte	2.778.307	2.755.585	1.219.926	0,3%	0,8%	0	0	0	0,0%	-	9.348.060	6.353.590	2.270.700	2,1%	47,1%			
16 Piauí	1.464.926	1.456.329	2.475.158	0,2%	0,6%	76.446	75.344	140.593	0,1%	1,5%	43.814	43.255	87.994	0,01%	1,3%			
17 Rondônia	1.112.801	143.375	0	0,1%	676,1%	298.300	37.068	0	0,2%	704,7%	1.079.999	131.676	0	0,2%	720,2%			
18 Maranhão	948.959	377.854	136.070	0,1%	151,1%	221.121	86.508	18.577	0,2%	155,6%	953.571	225.015	14.612	0,2%	323,8%			
19 Distrito Federal	241.870	585.874	358.836	0,03%	-58,7%	42.850	120.659	56.920	0,03%	-64,5%	213.783	641.495	286.500	0,05%	-66,7%			
20 Espírito Santo	138.390	10.550	18.692	0,01%	1211,8%	133	105	173	0,000%	26,7%	373.891	65	95	0,1%	575116,9%			
21 Alagoas	91.180	0	0	0,01%	-	0	0	0	0,00%	-	473.600	0	0	0,1%	-			
22 Amapá	47.574	31.371	705.611	0,005%	51,6%	0	0	0	0,0%	-	131.000	131.000	816.555	0,03%	0,0%			
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	132.111	0,0%	-100,0%	0	177.857	25.319	0,0%	-100,0%	0	874.075	131.210	0,0%	-100,0%			
Total	953.600.030	840.186.973	964.999.519	100,0%	13,5%	143.374.383	117.821.096	107.483.331	100,0%	21,7%	435.231.959	315.338.712	263.314.959	100,0%	38,0%			

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, in the first three quarters, presented the following highlights:

- Among the TOP10, monetary drops occurred in the states of Santa Catarina (-6.3%), Ceará (-2.8%) and Paraná (-0.4%). The biggest increases are in Mato Grosso do Sul (+70.5%), Minas Gerais (+68.0%) and Bahia (+52.5%).
- Considering the traded area, only Paraná has a reduction, with -2.4%. The other states in the TOP10 show growth, with emphasis on Minas Gerais, with +69.8%;
- Among the other states, Amazonas continues to have the biggest growth of the year in value and area;
- The ranking of states now has Paraná with the largest weight exported in the year, with a small difference for Rio Grande do Sul. In terms of value and area, the leadership continues to be held by companies from Rio Grande do Sul.

■ CLOSING REMARKS

There was a recovery in exports in September, with indexes again showing double-digit increases over the corresponding month of last year, after the weak month of August.

This month's increase of 11.6%, year-on-year, brought the value back above 100 million dollars. In volume, growth was even better, with +18.1% in area and +44.1% in weight, causing shipments to be close to or even above the monthly average for the year.

The biggest recovery of the month was in wet blue leather exports, which in terms of value and area were close to a 50% increase, even allowing for the second largest volume shipped of the year.

Despite the unoptimistic climate full of political and economic uncertainty and the wars in the Middle East and Ukraine, with a high impact on Europe, we registered improvements in shipment indexes to Italy in September, which is the main buyer of Brazilian wet blue leather in the region.

The most important issues in recent weeks have been the gigantic package to accelerate consumption in China, in addition to the release of oil production in Saudi Arabia. Both measures are positive, however, they come at a difficult time to assess their geopolitical reach, given global inaccuracies.