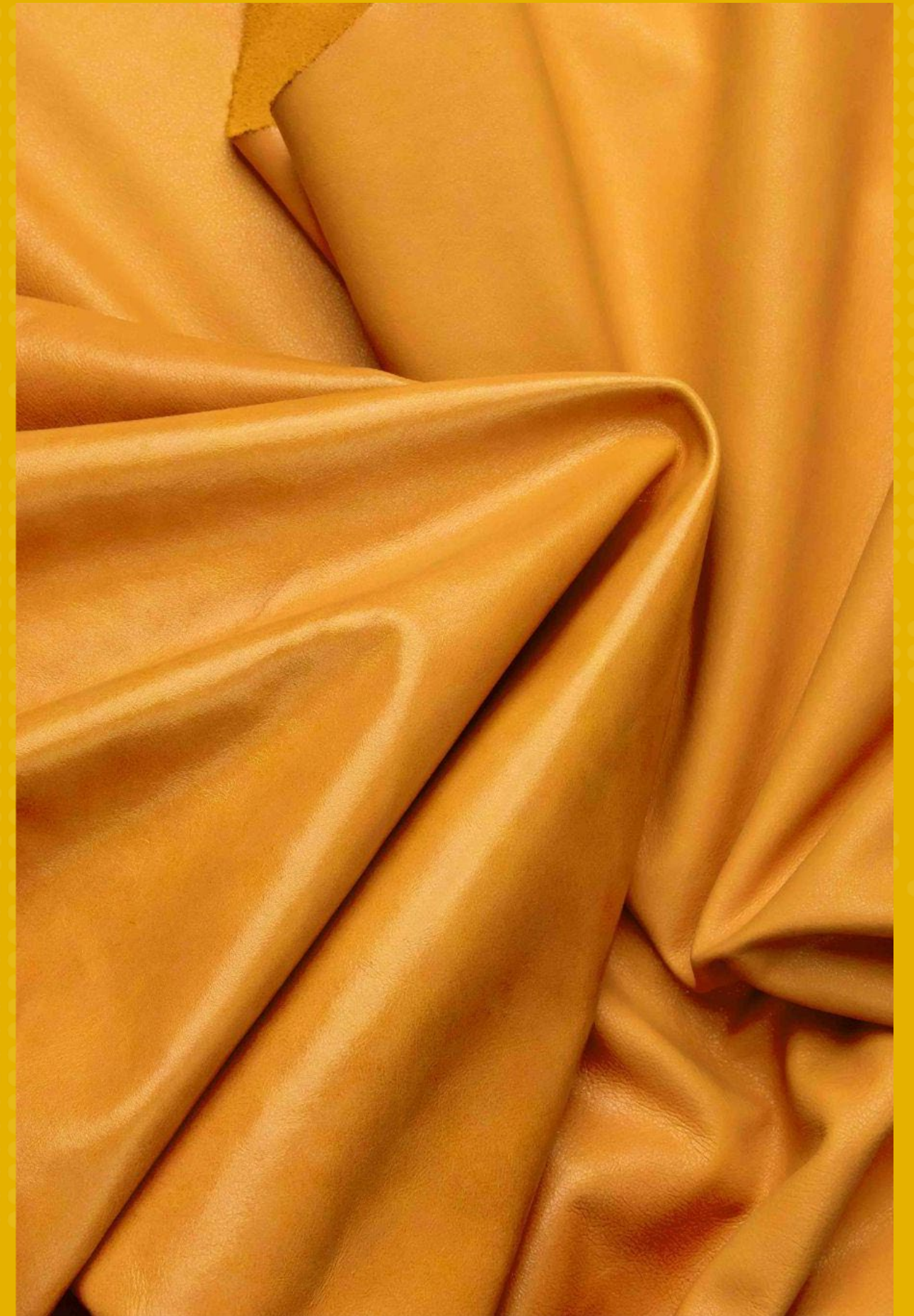


APRIL 2025

Brazilian exports of Hides and Skins



Brazilian leather

apexBrasil

MINISTRY OF
DEVELOPMENT,
INDUSTRY, TRADE
AND SERVICES

BRAZILIAN GOVERNMENT
BRASIL
UNITING AND REBUILDING

 CICB

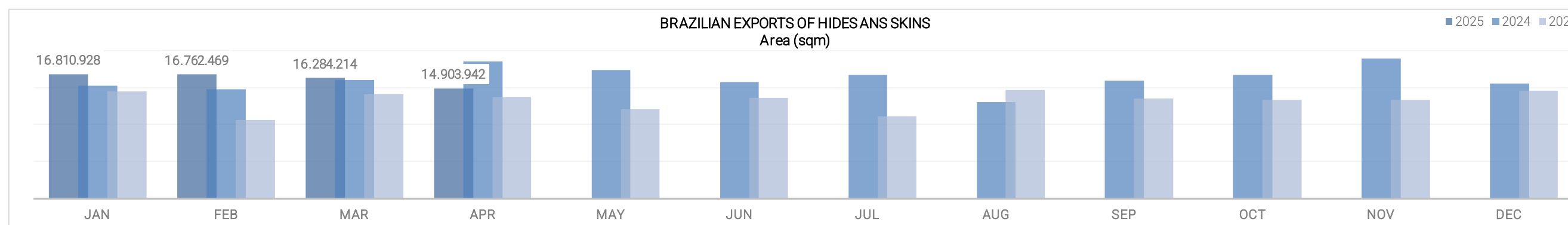
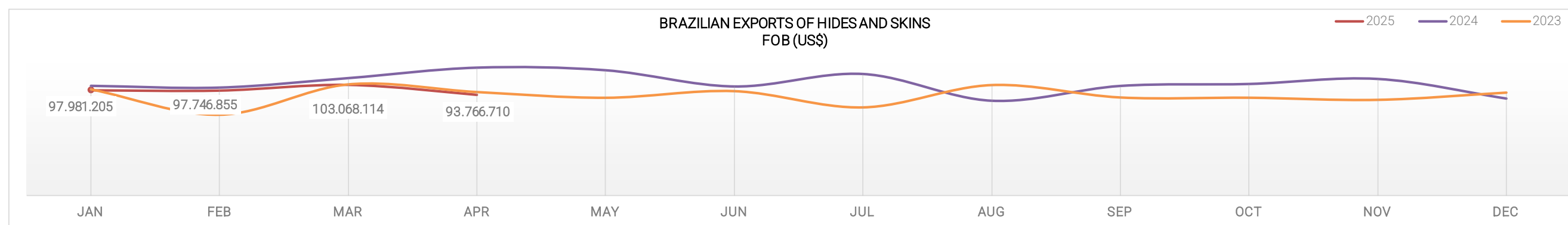
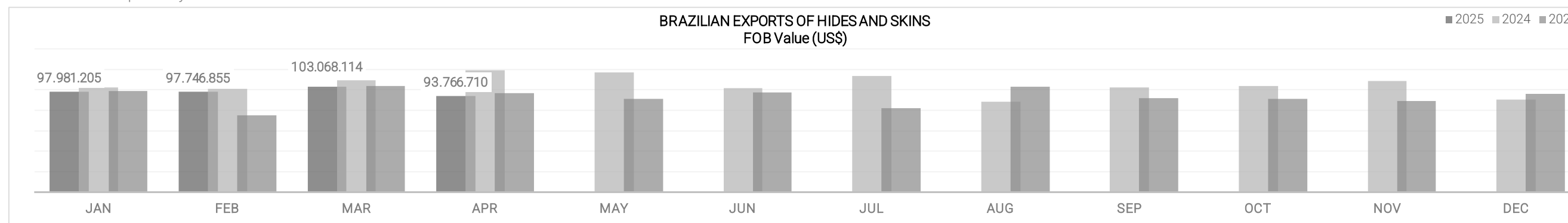
SUMMARY

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MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2025	2024	2023	MONTH 2025	2025/2024	2025/2023	2025	2024	2023	MONTH 2025	2025/2024	2025/2023	2025	2024	2023	MONTH 2025	2025/2024	2025/2023
JAN	97.981.205	102.231.845	99.097.256	8,3%	-4,2%	-1,1%	16.810.928	15.255.504	14.458.015	8,2%	10,2%	16,3%	59.128.620	42.745.080	40.842.514	18,2%	38,3%	44,8%
FEB	97.746.855	100.594.249	75.269.723	-0,2%	-2,8%	29,9%	16.762.469	14.792.606	10.666.731	-0,3%	13,3%	57,1%	57.522.014	46.844.191	29.776.931	-2,7%	22,8%	93,2%
MAR	103.068.114	109.365.779	103.785.252	5,4%	-5,8%	-0,7%	16.284.214	16.036.028	14.083.877	-2,9%	1,5%	15,6%	56.479.794	48.622.942	36.974.204	-1,8%	16,2%	52,8%
APR	93.766.710	119.059.249	96.588.085	-9,0%	-21,2%	-2,9%	14.903.942	18.558.785	13.705.693	-8,5%	-19,7%	8,7%	47.663.113	57.604.688	35.449.787	-15,6%	-17,3%	34,5%
MAY		116.642.884	91.214.382					17.328.197	12.063.660					52.802.187	31.339.687			
JUN		101.630.692	97.427.722					15.751.595	13.607.331					48.916.009	34.008.351			
JUL		113.183.342	82.168.631					16.664.501	11.107.588					46.789.650	29.554.021			
AUG		88.415.511	103.150.225					13.039.334	14.634.581					38.318.128	40.916.844			
SEP		102.126.294	91.485.697					15.932.097	13.493.620					52.577.119	36.476.373			
OCT		103.941.527	91.260.275					16.661.191	13.310.650					52.605.312	36.910.273			
NOV		108.597.301	89.258.600					18.888.816	13.305.461					59.837.325	36.828.021			
DEC		90.436.983	96.045.932					15.543.504	14.526.060					50.038.521	41.534.604			
Total	392.562.884	1.256.225.656	1.116.751.780		-9,0%	4,8%	64.761.553	194.452.158	158.963.267		0,2%	22,4%	220.793.541	597.701.152	430.611.610		12,8%	54,4%

Source: SECEX - Prepared by: CICB



■ ANALYSIS OF TOTAL EXPORTS

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Exports of hides and skins, according to data from SECEX (Secretariat of Foreign Trade) of the Ministry of Development, Industry, Trade and Services and analyzed by the CICB, reached US\$ 93.8 million in April 2025.

This value represents decreases of 9.0% compared to the previous month and 21.2% compared to the same period last year, when exports totaled US\$ 119.1 million.

In terms of volume, 14.9 million square meters and 47.7 thousand tons were exported, which represent reductions of 19.7% and 17.3%, respectively, compared to April 2024. Compared to March of this year, there were decreases of 8.5% in the area and 15.6% in weight.

The first four months of the year totaled US\$ 392.6 million, 9.0% below the same period in 2024, but with increases of 0.2% in area and 12.8% in weight.

BRAZILIAN EPORTS OF HIDES AND SKINS - DESTINATIONS

2025

COUNTRIES	FOB VALUE (US\$)			Share	Δ	AREA (sqm)			Share	Δ	WEIGHT (KG)			Share	Δ
	Jan-Apr 2025	Jan-Apr 2024	Jan-Apr 2023	2025	2025/2024	Jan-Apr 2025	Jan-Apr 2024	Jan-Apr 2023	2025	2025/2024	Jan-Apr 2025	Jan-Apr 2024	Jan-Apr 2023	2025	2025/2024
1 China + Hong Kong	128.177.899	139.185.659	121.695.903	32,7%	-7,9%	30.567.474	27.899.042	23.388.589	47,2%	9,6%	100.878.855	89.932.538	72.256.699	45,7%	12,2%
China	122.007.930	129.458.256	111.943.576	31,1%	-5,8%	29.482.511	26.142.424	21.313.448	45,5%	12,8%	98.138.427	84.851.454	66.748.708	44,4%	15,7%
2 United States	51.276.596	59.535.172	62.030.855	13,1%	-13,9%	4.134.585	4.536.356	4.728.953	6,4%	-8,9%	3.608.664	3.903.564	4.200.810	1,6%	-7,6%
3 Italy	51.141.806	49.679.130	47.724.181	13,0%	2,9%	9.873.401	8.485.384	8.472.188	15,2%	16,4%	32.977.114	27.228.186	28.656.017	14,9%	21,1%
4 Vietnam	39.106.388	44.457.227	17.899.321	10,0%	-12,0%	7.623.879	8.943.954	3.633.630	11,8%	-14,8%	18.864.470	22.087.741	8.824.628	8,5%	-14,6%
5 Mexico	18.546.806	25.448.730	16.544.038	4,7%	-27,1%	1.586.666	2.582.247	1.529.476	2,5%	-38,6%	1.965.990	3.859.269	2.042.351	0,9%	-49,1%
6 Nigeria	11.918.124	1.740.605	468.794	3,0%	584,7%	0	0	0	0,0%	-	31.561.945	6.110.150	1.528.750	14,3%	416,5%
7 Germany	9.592.298	13.278.134	11.518.550	2,4%	-27,8%	923.921	1.090.784	854.934	1,4%	-15,3%	961.517	907.477	731.456	0,4%	6,0%
8 Thailand	8.612.742	13.954.727	14.948.572	2,2%	-38,3%	1.011.006	1.635.597	1.570.133	1,6%	-38,2%	1.206.436	3.714.301	2.994.937	0,5%	-67,5%
Hong Kong	6.169.969	9.727.403	9.752.327	1,6%	-36,6%	1.084.963	1.756.618	2.075.141	1,7%	-38,2%	2.740.428	5.081.084	5.507.991	1,2%	-46,1%
9 South Korea	5.742.132	6.391.083	16.341.713	1,5%	-10,2%	576.972	620.115	1.578.526	0,9%	-7,0%	603.926	731.728	1.959.327	0,3%	-17,5%
10 Noruega	5.511.493	4.262.776	3.003.421	1,4%	29,3%	377.935	294.006	204.175	0,6%	28,5%	280.910	207.624	145.250	0,1%	35,3%
11 Slovakia	5.017.033	5.040.833	2.967.487	1,3%	-0,5%	372.379	331.897	182.712	0,6%	12,2%	329.411	316.947	185.375	0,1%	3,9%
12 Spain	4.885.780	3.077.090	2.964.474	1,2%	58,8%	1.159.142	813.578	819.824	1,8%	42,5%	2.797.044	2.103.174	2.386.755	1,3%	33,0%
13 Hungary	4.658.638	7.138.253	6.606.062	1,2%	-34,7%	464.777	607.685	518.517	0,7%	-23,5%	381.276	507.152	451.287	0,2%	-24,8%
14 Tunisia	4.444.222	4.293.546	3.539.324	1,1%	3,5%	284.700	279.028	230.218	0,4%	2,0%	444.637	406.929	345.287	0,2%	9,3%
15 Uruguay	4.266.560	4.189.233	3.368.181	1,1%	1,8%	480.552	514.073	387.067	0,7%	-6,5%	1.256.086	1.847.489	1.420.096	0,6%	-32,0%
16 India	4.033.199	2.961.713	2.198.563	1,0%	36,2%	1.296.576	869.578	401.300	2,0%	49,1%	3.203.798	2.402.944	1.243.421	1,5%	33,3%
17 Taiwan	3.443.570	4.932.529	4.961.651	0,9%	-30,2%	759.821	950.766	1.170.692	1,2%	-20,1%	2.397.191	2.820.300	3.492.122	1,1%	-15,0%
18 Argentina	2.853.587	1.967.060	4.523.844	0,7%	45,1%	256.184	117.106	295.124	0,4%	118,8%	359.979	156.519	350.561	0,2%	130,0%
19 Netherlands	2.662.662	3.079.035	3.566.781	0,7%	-13,5%	284.400	309.250	368.381	0,4%	-8,0%	277.394	304.435	359.318	0,1%	-8,9%
20 Bangladesh	2.401.810	2.711.223	885.143	0,6%	-11,4%	224.103	188.681	66.889	0,3%	18,8%	348.532	250.046	110.062	0,2%	39,4%
21 Colombia	2.018.132	1.551.932	217.906	0,5%	30,0%	397.036	260.945	9.679	0,6%	52,2%	1.275.988	794.562	30.803	0,6%	60,6%
22 Cambodia	1.877.901	2.704.447	1.060.520	0,5%	-30,6%	74.038	72.512	104.078	0,1%	2,1%	4.331.160	5.003.984	452.483	2,0%	-13,4%
23 Poland	1.763.524	2.165.744	2.281.844	0,4%	-18,6%	170.706	193.604	210.502	0,3%	-11,8%	141.343	164.877	171.003	0,1%	-14,3%
24 Portugal	1.507.278	2.000.698	1.568.161	0,4%	-24,7%	126.812	169.555	153.891	0,2%	-25,2%	254.378	284.512	413.636	0,1%	-10,6%
25 France	1.409.681	1.074.283	1.415.228	0,4%	31,2%	66.358	49.354	65.038	0,1%	34,5%	99.920	70.965	91.732	0,05%	40,8%
26 South Africa	1.270.406	1.066.501	1.615.518	0,3%	19,1%	159.190	125.474	158.483	0,2%	26,9%	241.198	161.077	268.088	0,1%	49,7%
27 Dominican Republic	1.261.328	818.716	685.211	0,3%	54,1%	193.133	117.295	97.897	0,3%	64,7%	708.705	408.097	304.043	0,3%	73,7%
28 Canada	1.207.798	1.516.756	1.285.498	0,3%	-20,4%	77.151	96.835	78.829	0,1%	-20,3%	68.479	129.340	70.662	0,03%	-47,1%
29 Turkey	1.116.571	2.953.737	1.753.387	0,3%	-62,2%	10.054	10.951	62.106	0,02%	-8,2%	4.709.166	9.596.615	3.582.070	2,1%	-50,9%
30 Indonesia	1.098.887	3.693.859	2.278.377	0,3%	-70,3%	176.703	558.347	286.161	0,3%	-68,4%	406.545	724.352	214.450	0,2%	-43,9%
Others (2025: +37 countries)	9.738.033	14.380.691	12.821.808	2,5%	-32,3%	1.051.899	1.918.924	1.286.324	1,6%	-45,2%	3.851.484	8.680.007	3.759.957	1,7%	-55,6%
Total	392.562.884	431.251.122	374.740.316		-9,0%	64.761.553	64.642.923	52.914.316		0,2%	220.793.541	195.816.901	143.043.436		12,8%

Source: MDIC/SECEX - Prepared by: CICB

■ ANALYSIS OF DESTINATIONS

The three main destinations for Brazilian leather presented the following data in the year:

China (excluding Hong Kong) has a share of 31.1% (previously 31.4%) in value and 45.5% (46.3%) in area, now with a decrease of 5.8% (+2.1%) in value and an increase of 12.8% (+27.3%) in area.

The United States retakes second place in the ranking, with 13.1% (12.9%) of share in value and 6.4% (6.3%) in area, still with decreases of 13.9% (-16.8%) in value and 8.9% (-10.3%) in area.

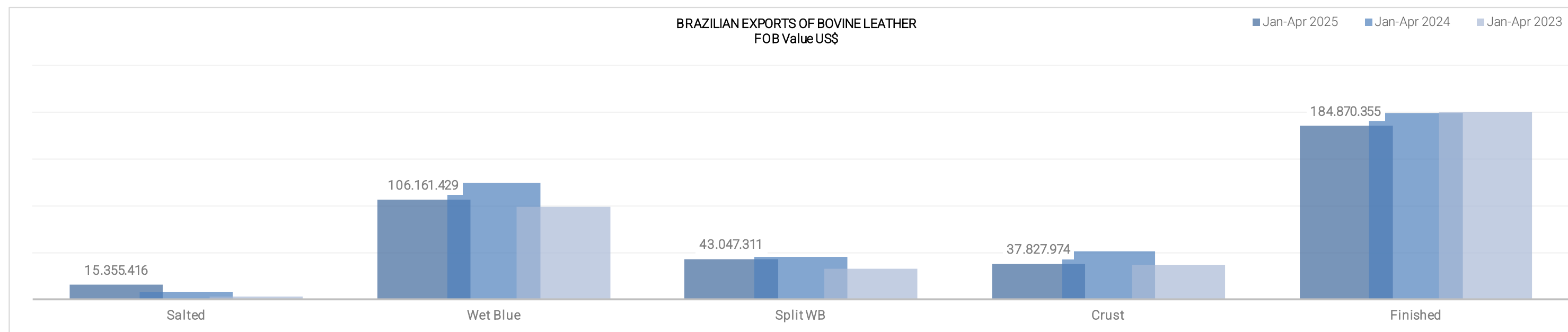
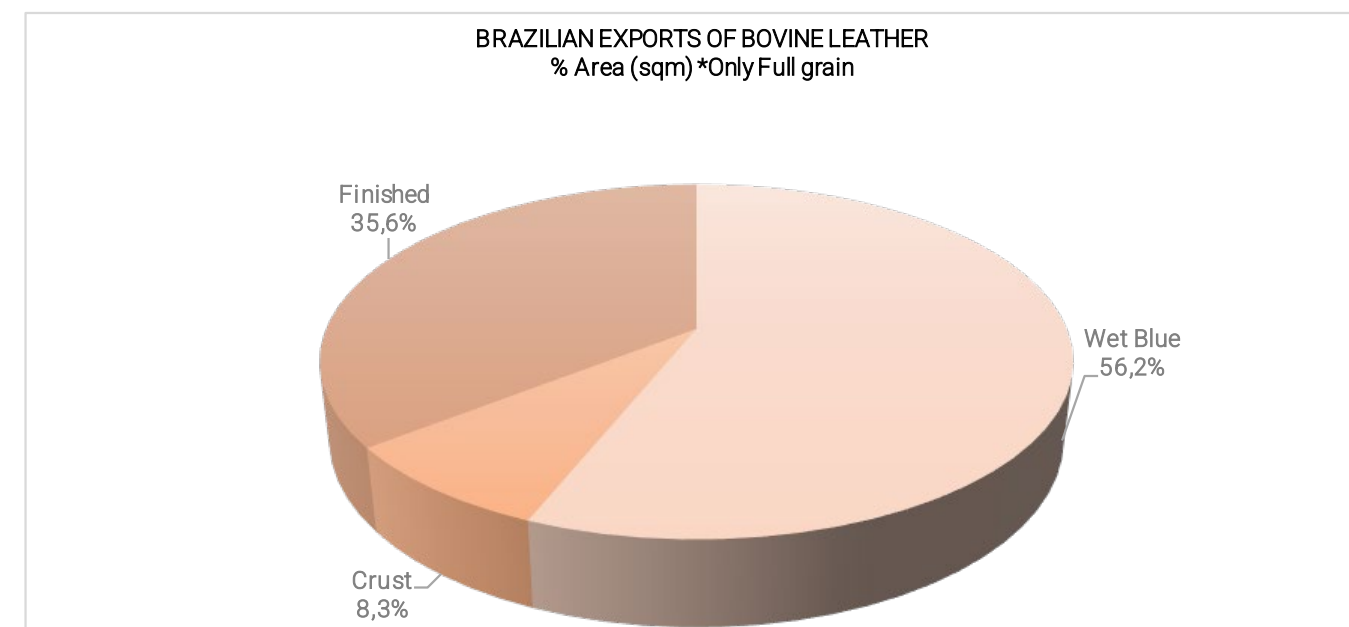
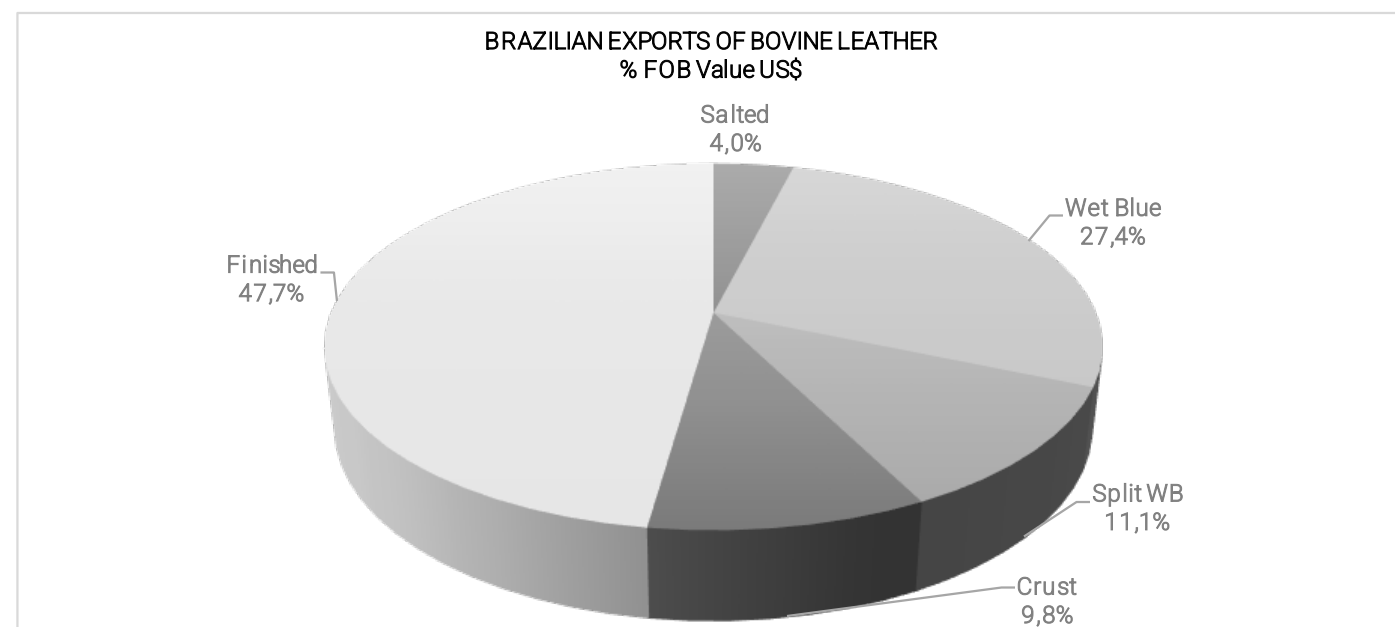
Italy in third, with a share of 13.0% (13.4%) in value and 15.2% (15.3%) in area, has a growth of 2.9% (+9.5%) in value and 16.4% (+20.0%) in area.

Only the United States improved its indexes with Brazilian exports in April. China and Italy recorded worsening, leading exports to a drop in the month. Despite the improvement, shipments to the United States still continue to fall in values and volumes. China started to record a decrease in the value imported from Brazil, maintaining a positive index in volume. And Italy maintains positive indexes in both aspects.

Among the other countries in the TOP10, we have growth only in leather exports to Norway, with +29.3% in value and +28.5% in area.

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Apr 2025	Jan-Apr 2024	Jan-Apr 2023	2025/2024	2025/2023	Jan-Apr 2025	Jan-Apr 2024	Jan-Apr 2023	2025/2024	2025/2023	Jan-Apr 2025	Jan-Apr 2024	Jan-Apr 2023	2025/2024	2025/2023
Salted	15.355.416	8.055.028	3.101.462	90,6%	395,1%	-	-	-	-	-	43.267.514	25.661.299	6.683.233	68,6%	547,4%
Wet Blue	106.161.429	124.051.348	98.417.245	-14,4%	7,9%	27.876.024	25.356.768	20.276.966	9,9%	37,5%	115.091.146	103.823.697	81.763.007	10,9%	40,8%
Split WB	43.047.311	45.294.672	32.878.738	-5,0%	30,9%	14.803.154	16.533.185	12.763.966	-10,5%	16,0%	42.152.131	45.601.953	36.502.828	-7,6%	15,5%
Crust	37.827.974	51.435.248	36.652.170	-26,5%	3,2%	4.112.918	5.071.264	3.121.124	-18,9%	31,8%	3.898.252	4.908.330	3.184.647	-20,6%	22,4%
Finished	184.870.355	198.469.484	199.240.539	-6,9%	-7,2%	17.654.365	17.495.486	16.634.048	0,9%	6,1%	15.619.719	15.301.515	14.574.059	2,1%	7,2%
Total	387.262.485	427.305.780	370.290.154	-9,4%	4,6%	64.446.461	64.456.703	52.796.104	-0,02%	22,1%	220.028.762	195.296.794	142.707.774	12,7%	54,2%

Source: MDIC/SECEX - Prepared by: CICB



■ ANALYSIS OF TYPES OF LEATHER

Brazilian exports of bovine hides by type showed the following changes in the first four months of 2025, compared to the same interval of the previous year:

Wet blue, with a share of 27.4% (28.1%) in value and 56.2% (57.3%) in area, with decreases of 14.4% (-6.8%) in value and an increase of 9.9% (+19.9%) in area.

Split WB, with 11.1% (11.0%) of participation in value, shows decreases of 5.0% (+8.1%) in value and 10.5% (+1.2%) in area.

Crust, with a share of 9.8% (9.7%) in value and 8.3% (8.3%) in area, shows reductions of 26.5% (-23.9%) in value and 18.9% (-14.5%) in area.

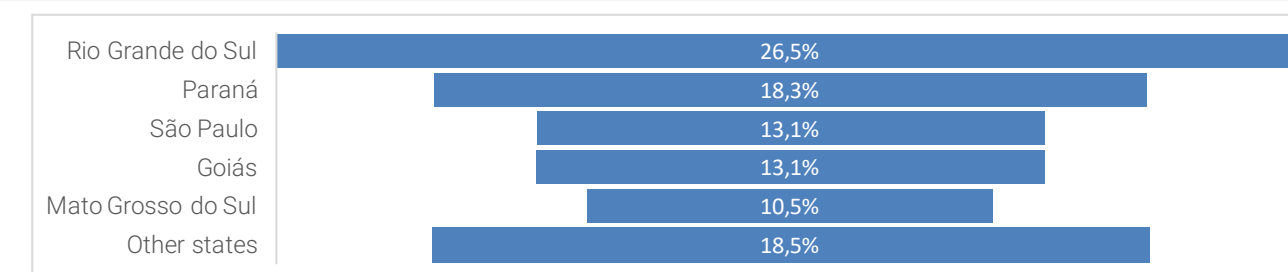
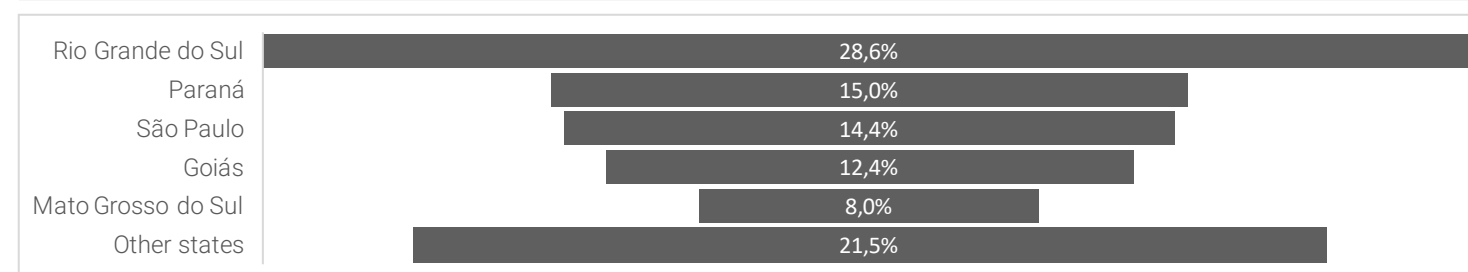
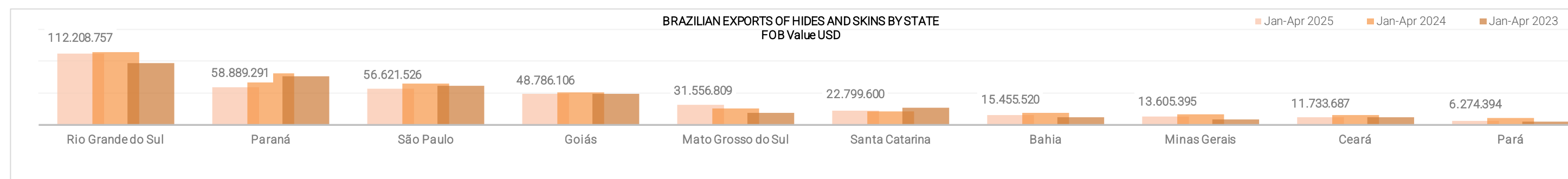
Finished leather, with a share of 47.7% (47.2%) in value and 35.6% (34.4%) in area, fell 6.9% (-5.6%), but increased 0.9% (+3.3%) in area.

With the low results of exports in April, now the wet blue splits also started to have a drop in value in the year to date. In volume, we have an increase in wet blue and finished leathers.

In April, salted hides slowed the pace of growth, mainly in volume, but still registered increases compared to the same month last year.

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-Apr 2025	Jan-Apr 2024	Jan-Apr 2023	2025	2025/2024		Jan-Apr 2025	Jan-Apr 2024	Jan-Apr 2023	2025	2025/2024		Jan-Apr 2025	Jan-Apr 2024	Jan-Apr 2023	2025	2025/2024	
1 Rio Grande do Sul	112.208.757	114.184.089	96.507.357	28,6%	-1,7%	17.150.947	16.730.258	12.223.207	26,5%	2,5%	39.144.749	37.850.939	27.977.917	17,7%	3,4%			
2 Paraná	58.889.291	80.851.475	75.833.802	15,0%	-27,2%	11.883.207	12.701.024	11.821.883	18,3%	-6,4%	42.538.966	40.076.194	33.939.569	19,3%	6,1%			
3 São Paulo	56.621.526	64.411.124	61.379.235	14,4%	-12,1%	8.471.147	8.837.836	7.947.660	13,1%	-4,1%	23.657.507	27.291.176	17.294.976	10,7%	-13,3%			
4 Goiás	48.786.106	50.752.049	49.334.081	12,4%	-3,9%	8.500.355	7.487.546	7.120.153	13,1%	13,5%	27.493.093	23.745.773	22.578.591	12,5%	15,8%			
5 Mato Grosso do Sul	31.556.809	25.569.521	19.378.962	8,0%	23,4%	6.787.448	4.993.578	4.299.521	10,5%	35,9%	25.126.156	16.110.912	15.547.264	11,4%	56,0%			
6 Santa Catarina	22.799.600	21.301.476	26.888.503	5,8%	7,0%	3.325.668	2.888.123	3.059.496	5,1%	15,1%	8.678.240	7.273.216	6.081.401	3,9%	19,3%			
7 Bahia	15.455.520	19.458.107	11.748.426	3,9%	-20,6%	1.866.729	2.567.904	1.804.684	2,9%	-27,3%	10.238.224	7.019.979	3.356.144	4,6%	45,8%			
8 Minas Gerais	13.605.395	16.278.981	8.895.181	3,5%	-16,4%	2.133.806	3.049.721	1.666.122	3,3%	-30,0%	8.414.001	7.610.942	3.777.261	3,8%	10,6%			
9 Ceará	11.733.687	15.150.400	12.324.676	3,0%	-22,6%	1.164.448	1.526.324	1.057.133	1,8%	-23,7%	1.947.681	2.321.595	1.498.897	0,9%	-16,1%			
10 Pará	6.274.394	11.377.853	5.729.892	1,6%	-44,9%	1.918.555	2.333.799	1.183.340	3,0%	-17,8%	13.378.962	12.123.779	5.760.773	6,1%	10,4%			
11 Mato Grosso	5.919.865	4.890.086	2.096.922	1,5%	21,1%	1.281.167	902.862	438.319	2,0%	41,9%	5.543.394	3.636.566	1.508.480	2,5%	52,4%			
12 Espírito Santo	2.229.668	13.969	7.744	0,6%	15861,5%	43	44	80	0,0%	-2,3%	5.206.733	53.125	49	2,4%	9700,9%			
13 Rio de Janeiro	2.102.364	1.251.414	1.899.376	0,5%	68,0%	24.436	21.742	40.541	0,04%	12,4%	12.219	129.423	71.150	0,01%	-90,6%			
14 Piauí	1.366.492	712.119	473.907	0,3%	91,9%	68.259	37.716	24.429	0,1%	81,0%	705.505	21.342	14.786	0,3%	3205,7%			
15 Rio Grande do Norte	1.244.092	1.278.711	684.391	0,3%	-2,7%	0	0	0	0,0%	-	3.960.300	4.469.890	1.641.100	1,8%	-11,4%			
16 Pernambuco	758.667	1.206.585	690.588	0,2%	-37,1%	3.938	49.777	24.811	0,01%	-92,1%	2.610.972	3.482.534	1.062.306	1,2%	-25,0%			
17 Rondônia	464.890	538.875	0	0,1%	-13,7%	124.169	146.938	0	0,2%	-15,5%	461.378	538.333	0	0,2%	-14,3%			
18 Paraíba	209.340	0	0	0,1%	-	0	0	0	0,0%	-	749.960	0	0	0,3%	-			
19 Maranhão	205.037	294.158	89.742	0,1%	-30,3%	57.231	22.164	26.696	0,1%	158,2%	398.801	282.744	61.097	0,2%	41,0%			
20 Alagoas	131.384	0	0	0,03%	-	0	0	0	0,0%	-	526.700	0	0	0,2%	-			
21 Amazonas	0	1.693.083	0	0,0%	-100,0%	0	337.182	0	0,0%	-100,0%	0	1.737.670	0	0,0%	-100,0%			
22 Distrito Federal	0	35.859	277.691	0,0%	-100,0%	0	8.376	56.881	0,0%	-100,0%	0	40.760	299.155	0,0%	-100,0%			
23 Not declared*	0	1.188	0	0,0%	-100,0%	0	9	0	0,0%	-100,0%	0	9	0	0,0%	-100,0%			
23 Tocantins	0	0	499.840	0,0%	-	0	0	119.360	0,0%	-	0	0	572.520	0,0%	-			
Total	392.562.884	431.251.122	374.740.316	100,0%	-9,0%	64.761.553	64.642.923	52.914.316	100,0%	0,2%	220.793.541	195.816.901	143.043.436	100,0%	12,8%			

Source: SECEX - Prepared by CICB *Advanced shipping, without prior information on the state of origin by the exporter



■ ANALYSIS OF STATES

In the first four months of the year, exports from Brazilian states presented the following highlights:

Among the top 10, Mato Grosso do Sul continues with the highest increase of the year, with +23.4% (+37.4%), while Pará continues with the biggest drop, with -44.9% (-42.8%). The state of Santa Catarina also recorded an increase in value, of +7.0%.

Regarding the area shipped, we have double-digit increases in Mato Grosso do Sul, with +35.9%, Santa Catarina with +15.1% and Goiás with +13.5%. The other states in the TOP10 show decreases.

Among the other states in the ranking and leather exporters, we highlight Rio de Janeiro, which shows growth of 68.0% in value and 12.4% in area.

The state ranking remains unchanged, with Rio Grande do Sul in first place in value (28.6% share) and area (26.5%), followed by Paraná (15.0% and 18.3%, respectively), São Paulo (14.4% and 13.1%) and Goiás (12.4% and 13.1%).

■ CLOSING REMARKS

April's exports indicate that the sector is already beginning to feel the effects of a slowdown in shipments, mainly influenced by the tariff war affecting its main Asian destination.

China recorded a drop in the value of Brazilian leather imports in April. Although the exported volume is still positive, there was a deterioration in the area and weight indexes compared to the accumulated results until March.

Shipments of wet blue leather and splits, which last year ended with an increase of more than 30% in value and volume, are now showing retractions, putting negative pressure on the overall performance of exports. Only the exported area of wet blue leather continues to grow.

In April, production in China and Southeast Asian countries contracted, reflecting the decrease in international orders. South Korea and Taiwan were also negatively impacted by the developments of the tariff war, and the level of business confidence retreated, reaching the lowest level since 2020.

Additionally, in Europe, uncertainties continue regarding geopolitical and tariff issues, which are intensified mainly by the lack of a concrete solution to the war in Ukraine. The excessive appreciation of the euro has also negatively impacted European exports, further exacerbating the crisis in the tanning industry. -