

AUGUST 2025

Brazilian exports of Hides and Skins

Brazilian leather

apexBrasil

MINISTRY OF
DEVELOPMENT,
INDUSTRY, TRADE
AND SERVICES

BRAZILIAN GOVERNMENT
BRASIL
UNITING AND REBUILDING

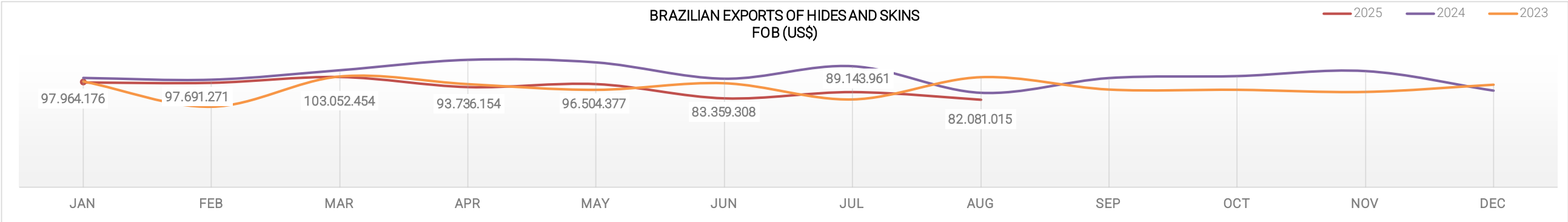
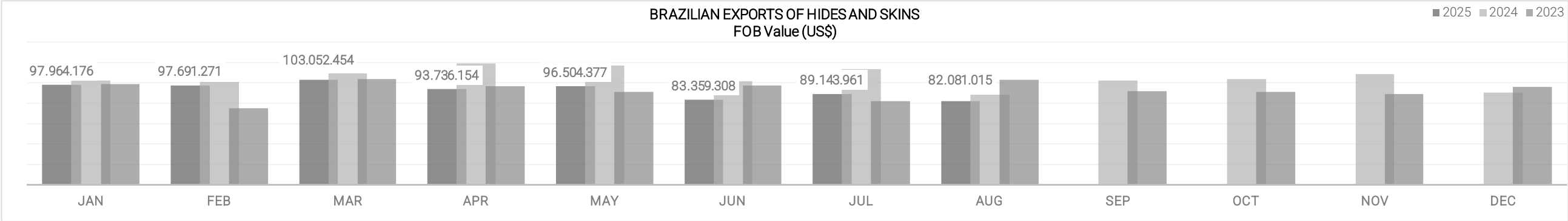
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MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2025	2024	2023	MONTH 2025	2025/2024	2025/2023	2025	2024	2023	MONTH 2025	2025/2024	2025/2023	2025	2024	2023	MONTH 2025	2025/2024	2025/2023
JAN	97.964.176	102.231.845	99.097.256	8,3%	-4,2%	-1,1%	16.803.758	15.255.504	14.458.015	8,1%	10,1%	16,2%	59.127.692	42.745.080	40.842.514	18,2%	38,3%	44,8%
FEB	97.691.271	100.594.249	75.269.723	-0,3%	-2,9%	29,8%	16.755.825	14.792.606	10.666.731	-0,3%	13,3%	57,1%	57.507.076	46.844.191	29.776.931	-2,7%	22,8%	93,1%
MAR	103.052.454	109.365.779	103.785.252	5,5%	-5,8%	-0,7%	16.281.617	16.036.028	14.083.877	-2,8%	1,5%	15,6%	56.479.794	48.622.942	36.974.204	-1,8%	16,2%	52,8%
APR	93.736.154	119.059.249	96.588.085	-9,0%	-21,3%	-3,0%	14.902.245	18.558.785	13.705.693	-8,5%	-19,7%	8,7%	47.661.286	57.604.688	35.449.787	-15,6%	-17,3%	34,4%
MAY	96.504.377	116.642.884	91.214.382	3,0%	-17,3%	5,8%	14.809.643	17.328.197	12.063.660	-0,6%	-14,5%	22,8%	44.951.452	52.802.187	31.339.687	-5,7%	-14,9%	43,4%
JUN	83.359.308	101.521.633	97.427.722	-13,6%	-17,9%	-14,4%	13.414.081	15.744.226	13.607.331	-9,4%	-14,8%	-1,4%	40.291.621	48.911.073	34.008.351	-10,4%	-17,6%	18,5%
JUL	89.143.961	113.124.002	82.168.631	6,9%	-21,2%	8,5%	14.238.928	16.661.127	11.107.588	6,1%	-14,5%	28,2%	45.280.820	46.784.480	29.554.021	12,4%	-3,2%	53,2%
AUG	82.081.015	88.415.511	103.150.225	-7,9%	-7,2%	-20,4%	13.459.540	13.039.334	14.634.581	-5,5%	3,2%	-8,0%	45.292.837	38.318.128	40.916.844	0,0%	18,2%	10,7%
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	743.532.716	1.256.057.257	1.116.751.780		-12,6%	-0,7%	120.665.637	194.441.415	158.963.267		-5,3%	15,7%	396.592.578	597.691.046	430.611.610		3,6%	42,2%

Source: SECEX - Prepared by: CICB



■ ANALYSIS OF TOTAL EXPORTS

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Exports of hides and skins in August 2025, according to data from SECEX (Secretariat of Foreign Trade) of the Ministry of Development, Industry, Commerce and Services and analyzed by CICB, reached US\$ 82.1 million.

This value represents decreases of 7.9% compared to the previous month, and 7.2% compared to the same month last year, when exports totaled US\$ 88.4 million.

In volume, 13.5 million square meters and 45.3 thousand tons were exported, which represent increases of 3.2% and 18.2%, respectively, compared to August 2024. Compared to July of this year, there was a drop of 5.5% in the area and a slight increase of 0.03% in the weight.

The period from January to August this year totaled US\$ 743.5 million, 12.6% below the same interval in 2024, also with a decrease of 5.3% in area, but an increase of 3.6% in weight.

COUNTRIES	FOB VALUE (US\$)			Share		AREA (sqm)			Share		WEIGHT (KG)			Share	
	Jan-Aug 2025	Jan-Aug 2024	Jan-Aug 2023	2025	2025/2024	Jan-Aug 2025	Jan-Aug 2024	Jan-Aug 2023	2025	2025/2024	Jan-Aug 2025	Jan-Aug 2024	Jan-Aug 2023	2025	2025/2024
1 China + Hong Kong	230.030.047	279.923.438	231.233.323	30,9%	-17,8%	54.771.078	55.383.334	44.024.952	45,4%	-1,1%	175.225.697	176.199.047	133.002.615	44,2%	-0,6%
China	220.033.590	262.401.468	207.703.418	29,6%	-16,1%	52.748.534	52.145.994	39.551.071	43,7%	1,2%	169.958.604	167.133.666	121.562.587	42,9%	1,7%
2 United States	104.936.597	115.891.126	126.471.382	14,1%	-9,5%	8.728.342	8.844.361	9.562.374	7,2%	-1,3%	7.871.461	7.941.136	8.448.910	2,0%	-0,9%
3 Italy	83.236.281	98.480.230	91.765.478	11,2%	-15,5%	15.746.327	16.575.155	15.755.238	13,0%	-5,0%	51.562.169	52.390.532	50.879.589	13,0%	-1,6%
4 Vietnam	77.382.155	88.433.648	44.007.938	10,4%	-12,5%	15.199.843	17.797.248	8.734.655	12,6%	-14,6%	37.115.727	42.757.273	21.031.282	9,4%	-13,2%
5 Mexico	41.454.779	47.038.121	33.625.998	5,6%	-11,9%	3.601.035	4.546.229	3.231.841	3,0%	-20,8%	4.497.428	6.273.225	4.520.127	1,1%	-28,3%
6 Nigeria	20.861.462	4.609.034	1.854.182	2,8%	352,6%	10	0	0	0,0%	-	51.812.462	14.921.911	5.853.478	13,1%	247,2%
7 South Korea	17.260.149	10.920.476	35.396.783	2,3%	58,1%	1.720.913	1.033.099	3.352.826	1,4%	66,6%	1.668.374	1.124.443	4.074.419	0,4%	48,4%
8 Germany	16.387.650	22.307.952	21.920.923	2,2%	-26,5%	1.593.690	1.836.268	1.684.118	1,3%	-13,2%	2.035.251	1.560.254	1.427.908	0,5%	30,4%
9 Thailand	15.777.590	28.927.667	27.696.371	2,1%	-45,5%	1.912.211	3.633.126	2.866.214	1,6%	-47,4%	2.470.969	9.297.063	4.852.833	0,6%	-73,4%
Hong Kong	9.996.457	17.521.970	23.529.905	1,3%	-42,9%	2.022.544	3.237.340	4.473.881	1,7%	-37,5%	5.267.093	9.065.381	11.440.028	1,3%	-41,9%
10 Spain	9.965.696	6.316.080	5.983.343	1,3%	57,8%	2.484.600	1.495.447	1.548.245	2,1%	66,1%	6.435.184	3.919.093	4.443.659	1,6%	64,2%
11 Hungary	8.475.654	12.808.522	13.887.651	1,1%	-33,8%	840.550	1.123.934	1.123.291	0,7%	-25,2%	697.197	938.242	968.606	0,2%	-25,7%
12 Norway	8.359.510	7.270.398	5.792.348	1,1%	15,0%	567.482	500.977	403.410	0,5%	13,3%	426.478	353.341	283.661	0,1%	20,7%
13 Uruguay	8.251.740	10.088.776	8.020.465	1,1%	-18,2%	968.806	1.283.750	962.538	0,8%	-24,5%	2.515.904	4.739.859	3.064.097	0,6%	-46,9%
14 Taiwan	8.233.990	10.701.217	10.957.904	1,1%	-23,1%	1.950.318	2.195.574	2.665.247	1,6%	-11,2%	5.918.537	7.174.877	7.539.084	1,5%	-17,5%
15 Slovakia	8.074.311	9.705.137	5.554.095	1,1%	-16,8%	600.273	657.730	354.290	0,5%	-8,7%	534.914	613.651	345.773	0,1%	-12,8%
16 Argentina	7.167.323	4.319.010	7.435.575	1,0%	65,9%	721.939	326.054	546.511	0,6%	121,4%	997.928	375.925	642.529	0,3%	165,5%
17 Tunisia	7.084.262	9.355.633	8.325.273	1,0%	-24,3%	442.776	605.489	527.280	0,4%	-26,9%	687.467	895.110	812.037	0,2%	-23,2%
18 India	6.890.805	6.104.624	5.481.318	0,9%	12,9%	2.159.715	1.540.147	1.196.588	1,8%	40,2%	5.505.261	4.424.992	3.964.045	1,4%	24,4%
19 Cambodia	6.404.245	5.007.815	2.251.775	0,9%	27,9%	756.458	164.405	182.698	0,6%	360,1%	9.330.686	8.406.988	1.376.669	2,4%	11,0%
20 Bangladesh	4.878.461	5.212.338	1.480.458	0,7%	-6,4%	397.462	402.551	107.971	0,3%	-1,3%	572.894	640.683	162.916	0,1%	-10,6%
21 Poland	4.149.492	3.969.221	4.095.223	0,6%	4,5%	390.574	353.999	374.342	0,3%	10,3%	320.164	300.882	307.269	0,1%	6,4%
22 Portugal	4.098.173	3.783.834	3.289.285	0,6%	8,3%	325.831	306.842	309.395	0,3%	6,2%	496.514	444.220	752.924	0,1%	11,8%
23 Netherlands	4.090.441	6.144.126	7.202.192	0,6%	-33,4%	453.267	614.356	722.605	0,4%	-26,2%	447.361	601.352	701.150	0,1%	-25,6%
24 Indonesia	3.842.384	9.693.751	2.627.219	0,5%	-60,4%	683.981	1.595.572	331.005	0,6%	-57,1%	1.568.388	2.797.150	250.068	0,4%	-43,9%
25 Turkey	3.751.732	4.835.411	4.400.447	0,5%	-22,4%	21.540	25.431	62.106	0,02%	-15,3%	13.832.994	15.706.935	9.500.500	3,5%	-11,9%
26 Colombia	2.825.027	2.715.600	940.819	0,4%	4,0%	541.119	436.439	103.569	0,4%	24,0%	1.702.931	1.286.991	299.563	0,4%	32,3%
27 South Africa	2.676.879	1.882.415	2.798.048	0,4%	42,2%	336.812	230.961	288.153	0,3%	45,8%	498.394	308.694	427.157	0,1%	61,5%
28 France	2.615.187	2.648.564	3.207.176	0,4%	-1,3%	121.028	118.723	136.266	0,1%	1,9%	186.377	180.128	203.024	0,05%	3,5%
29 Canada	2.607.134	2.901.245	3.062.586	0,4%	-10,1%	164.615	180.172	186.235	0,1%	-8,6%	151.664	203.954	167.275	0,04%	-25,6%
30 Dominican Republic	2.488.111	1.971.862	1.277.939	0,3%	26,2%	377.879	283.477	155.935	0,3%	33,3%	1.369.748	1.012.602	407.127	0,3%	35,3%
Others (2025: +45 countries)	19.275.449	26.987.881	26.657.759	2,6%	-28,6%	2.085.163	3.324.957	2.827.578	1,7%	-37,3%	8.136.055	14.842.216	8.152.045	2,1%	-45,2%
Total	743.532.716	850.955.152	748.701.276		-12,6%	120.665.637	127.415.807	104.327.476		-5,3%	396.592.578	382.632.769	278.862.339		3,6%

■ ANALYSIS OF DESTINATIONS

The three main destinations for Brazilian leather presented the following data in the eight-month interval:

China (excluding Hong Kong) has a share of 29.6% (previously 29.7%) in value and 43.7% (44.0%) in area, down 16.1% (-15.5%) in value, but still up 1.2% (+2.0%) in area.

The United States is in second place in the ranking, with 14.1% (14.3%) of share in value, maintaining 7.2% (7.2%) in area, with decreases of 9.5% (-10.7%) in value and 1.3% (-4.8%) in area.

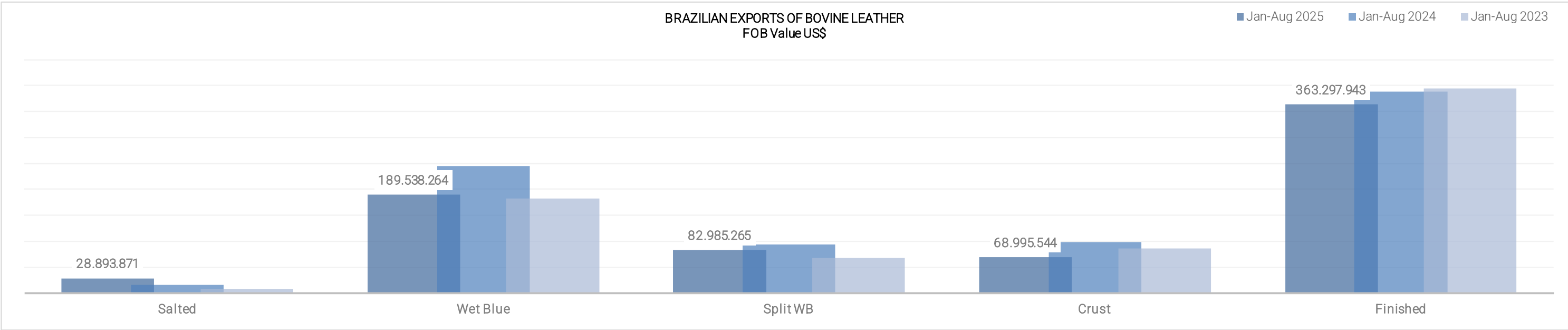
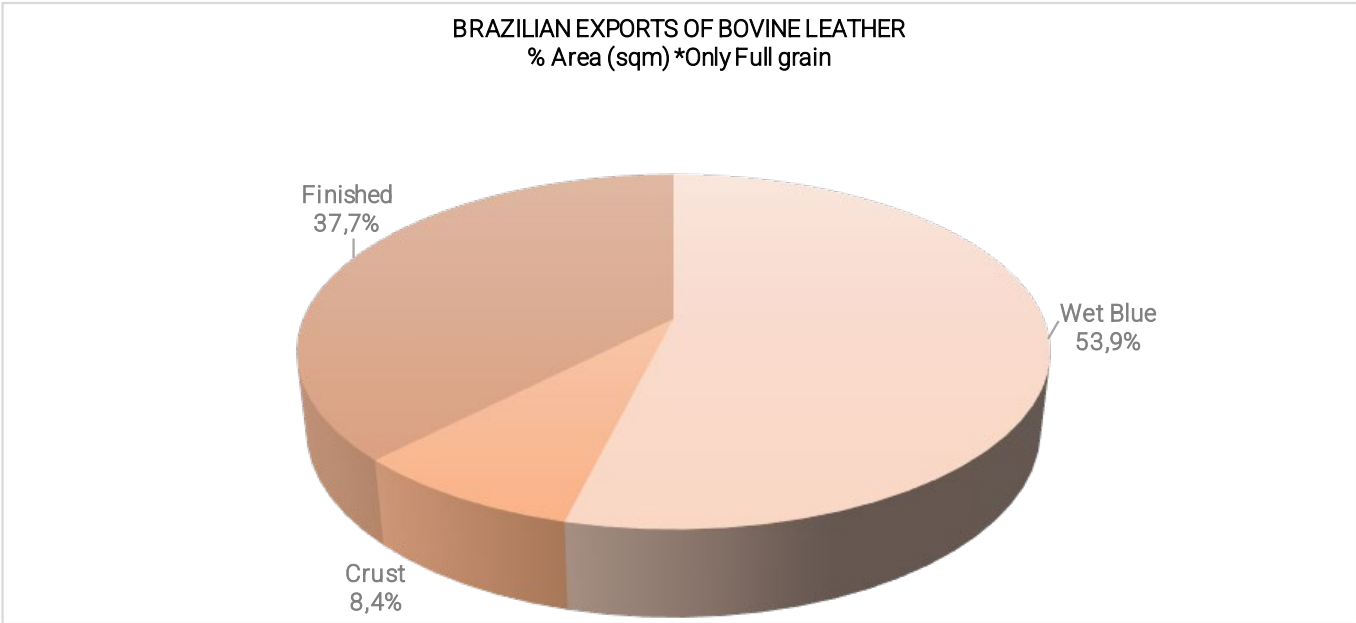
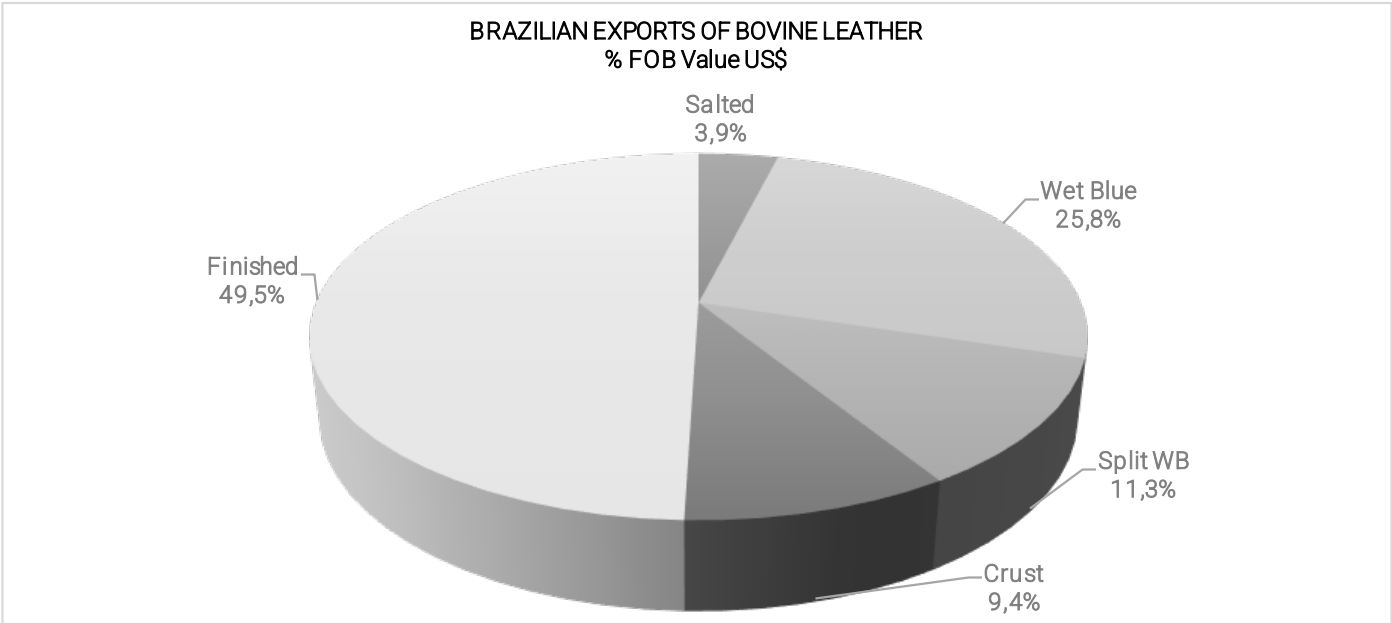
Italy in third, with a share of 11.2% (11.1%) in value, maintaining 13.0% (13.0%) in area, has decreases of 15.5% (-16.3%) in value and 5.0% (-5.8%) in area.

China and the US maintain a certain stability in the area of purchases of national leather in the accumulated up to August, but with stronger negative results in values (China -16.1% and USA -9.5%). On the other hand, shipments to Italy have the largest drop in area among the TOP3, with -5.0%.

Among the other countries in the TOP10, the biggest decreases in the year are for Thailand (-45.5% in value and -47.4% in area) and Hong Kong (-42.9% and -37.5%).

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Aug 2025	Jan-Aug 2024	Jan-Aug 2023	2025/2024	2025/2023	Jan-Aug 2025	Jan-Aug 2024	Jan-Aug 2023	2025/2024	2025/2023	Jan-Aug 2025	Jan-Aug 2024	Jan-Aug 2023	2025/2024	2025/2023
Salted	28.893.871	15.469.026	8.410.864	86,8%	243,5%	-	-	-	-	-	77.344.563	47.946.145	19.379.304	61,3%	299,1%
Wet Blue	189.538.264	244.938.292	181.654.697	-22,6%	4,3%	49.231.148	49.435.690	36.969.800	-0,4%	33,2%	197.955.311	200.419.241	147.767.396	-1,2%	34,0%
Split WB	82.985.265	93.994.742	68.627.533	-11,7%	20,9%	28.646.643	33.213.533	26.201.671	-13,8%	9,3%	81.303.168	93.579.366	74.441.530	-13,1%	9,2%
Crust	68.995.544	98.784.069	86.761.827	-30,2%	-20,5%	7.709.416	10.073.200	7.794.279	-23,5%	-1,1%	7.218.191	9.751.367	7.635.999	-26,0%	-5,5%
Finished	363.297.943	389.024.808	394.202.035	-6,6%	-7,8%	34.436.831	34.332.708	33.084.239	0,3%	4,1%	30.588.653	29.984.366	28.940.946	2,0%	5,7%
Total	733.710.887	842.210.937	739.656.956	-12,9%	-0,8%	120.024.038	127.055.131	104.049.989	-5,53%	15,4%	394.409.886	381.680.485	278.165.175	3,3%	41,8%

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 eight months of the year, compared to the same interval of the previous year:

Wet blue, with a share of 25.8% (25.7%) in value and 53.9% (53.8%) in area, with decreases of 22.6% (-24.8%) in value and 0.4% (-2.9%) in area.

Split WB maintains 11.3% (11.4%) of share in value, with decreases of 11.7% (-10.7%) in value and 13.8% (-14.0%) in area.

Crust, with a share of 9.4% (9.5%) in value and 8.4% (8.5%) in area, shows reductions of 30.2% (-29.0%) in value and 23.5% (-22.3%) in area.

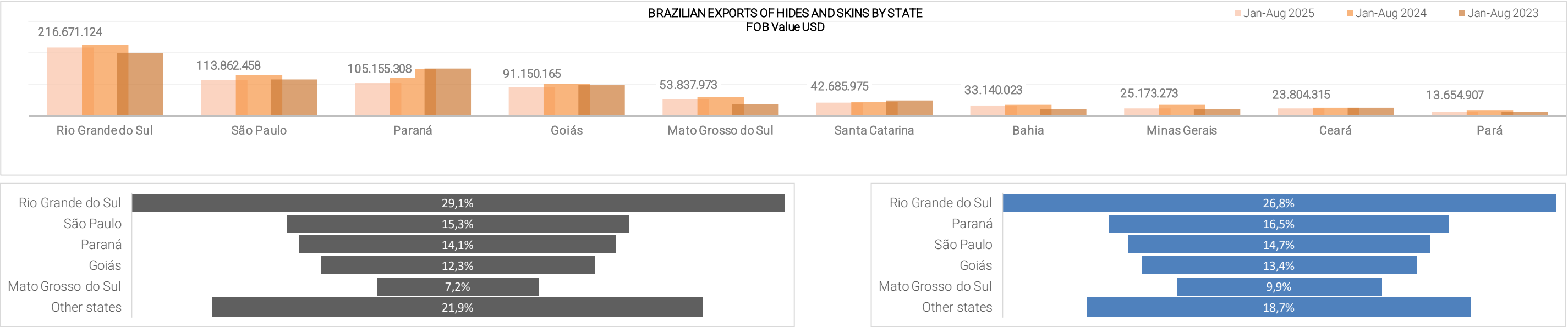
Finished leather maintains for another month a share of 49.5% (49.5%) in value and 37.7% (37.7%) in area, with a decrease of 6.6% (-6.8%) in value, but an increase of 0.3% (+0.1%) in area.

Wet blue leather now joins finished leather, maintaining stability in volume compared to the same period last year. However, as we reported in previous months, the average price level below US\$ 4.00/m² still maintains a strong double-digit drop in total value, being the main reason for the reduction in total exports in the year.

Although August last year was one of the months with the lowest volume shipped in 2024, the volume of shipments of salted hides this month doubled in the annual comparison.

		FOB VALUE (US\$)				Δ	AREA (sqm)				Δ	WEIGHT (KG)				Δ
		Jan-Aug 2025	Jan-Aug 2024	Jan-Aug 2023	2025	2025/2024	Jan-Aug 2025	Jan-Aug 2024	Jan-Aug 2023	2025	2025/2024	Jan-Aug 2025	Jan-Aug 2024	Jan-Aug 2023	2025	2025/2024
1	Rio Grande do Sul	216.671.124	225.780.839	198.278.874	29,1%	-4,0%	32.388.587	31.895.147	24.639.097	26,8%	1,5%	71.857.421	73.637.344	54.979.247	18,1%	-2,4%
2	São Paulo	113.862.458	128.820.139	116.727.505	15,3%	-11,6%	17.704.013	18.025.041	14.207.835	14,7%	-1,8%	46.386.765	51.855.080	30.070.566	11,7%	-10,5%
3	Paraná	105.155.308	147.515.771	149.743.816	14,1%	-28,7%	19.949.302	23.478.747	23.677.194	16,5%	-15,0%	66.943.538	72.309.682	65.663.055	16,9%	-7,4%
4	Goiás	91.150.165	101.875.754	98.726.612	12,3%	-10,5%	16.111.629	15.176.583	14.111.623	13,4%	6,2%	51.030.504	48.037.873	41.867.871	12,9%	6,2%
5	Mato Grosso do Sul	53.837.973	61.768.555	37.875.352	7,2%	-12,8%	12.003.802	11.849.903	8.220.216	9,9%	1,3%	43.528.102	39.782.198	28.407.982	11,0%	9,4%
6	Santa Catarina	42.685.975	43.954.259	49.181.221	5,7%	-2,9%	6.148.509	6.078.775	5.749.028	5,1%	1,1%	15.601.809	15.206.413	11.305.045	3,9%	2,6%
7	Bahia	33.140.023	35.893.182	22.321.522	4,5%	-7,7%	4.099.635	4.717.142	3.285.685	3,4%	-13,1%	21.544.078	13.433.736	6.055.825	5,4%	60,4%
8	Minas Gerais	25.173.273	36.160.804	21.402.041	3,4%	-30,4%	3.897.057	6.761.137	3.906.138	3,2%	-42,4%	15.883.504	16.317.373	7.936.973	4,0%	-2,7%
9	Ceará	23.804.315	27.552.500	26.604.668	3,2%	-13,6%	2.262.540	2.721.815	2.434.125	1,9%	-16,9%	4.135.627	4.341.325	3.556.400	1,0%	-4,7%
10	Pará	13.654.907	16.685.171	12.706.841	1,8%	-18,2%	3.764.765	3.511.755	2.646.451	3,1%	7,2%	24.704.837	17.923.224	12.830.323	6,2%	37,8%
11	Mato Grosso	8.427.482	9.572.292	3.881.706	1,1%	-12,0%	1.863.034	1.841.626	835.913	1,5%	1,2%	7.906.591	7.295.789	2.852.424	2,0%	8,4%
12	Rio de Janeiro	3.639.181	3.139.146	3.463.480	0,5%	15,9%	43.758	47.456	111.116	0,04%	-7,8%	22.832	162.384	261.739	0,01%	-85,9%
13	Espírito Santo	3.040.445	67.871	10.550	0,4%	4379,7%	93	133	105	0,0%	-30,1%	7.223.503	192.961	65	1,8%	3643,5%
14	Rio Grande do Norte	2.790.525	2.449.084	2.594.588	0,4%	13,9%	0	0	0	0,0%	-	8.434.050	8.262.060	5.930.590	2,1%	2,1%
15	Piauí	2.782.116	1.373.053	1.194.722	0,4%	102,6%	148.010	71.165	61.417	0,1%	108,0%	1.263.080	40.925	36.006	0,3%	2986,3%
16	Pernambuco	1.460.481	2.846.132	2.049.710	0,2%	-48,7%	6.522	62.743	31.779	0,01%	-89,6%	4.662.379	7.963.235	5.150.472	1,2%	-41,5%
17	Paraíba	675.090	0	52.191	0,1%	-	0	0	0	0,0%	-	2.164.340	0	106.000	0,5%	-
18	Rondônia	588.439	1.056.411	143.375	0,1%	-44,3%	155.571	286.101	37.068	0,1%	-45,6%	583.006	1.021.546	131.676	0,1%	-42,9%
19	Alagoas	561.521	56.220	0	0,1%	898,8%	0	0	0	0,0%	-	1.865.900	278.950	0	0,5%	568,9%
20	Maranhão	431.915	762.395	293.237	0,1%	-43,3%	118.810	152.212	63.087	0,1%	-21,9%	850.712	770.149	153.490	0,2%	10,5%
21	Amapá	0	17.452	0	0,0%	-100,0%	0	0	0	0,0%	-	0	79.500	0	0,0%	-100,0%
22	Amazonas	0	3.365.064	171.699	0,0%	-100,0%	0	695.467	31.682	0,0%	-100,0%	0	3.507.230	160.080	0,0%	-100,0%
23	Distrito Federal	0	241.870	494.279	0,0%	-100,0%	0	42.850	100.060	0,0%	-100,0%	0	213.783	532.435	0,0%	-100,0%
24	Not declared*	0	1.188	0	0,0%	-100,0%	0	9	0	0,0%	-100,0%	0	9	0	0,0%	-100,0%
25	Tocantins	0	0	783.287	0,0%	#DIV/0!	0	0	177.857	0,0%	-	0	0	874.075	0,0%	-
Total		743.532.716	850.955.152	748.701.276	100,0%	-12,6%	120.665.637	127.415.807	104.327.476	100,0%	-5,3%	396.592.578	382.632.769	278.862.339	100,0%	3,6%

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



■ ANALYSIS OF STATES

In the period up to August, exports from Brazilian states presented the following highlights:

Among the TOP10, the biggest drop in value and volume occurs in Minas Gerais, with -30.4% and -42.4%, respectively. Rio Grande do Sul and Santa Catarina still register the best monetary performance, remaining close to stability.

Considering the area shipped, the biggest increases are in Pará (+7.2%) and Goiás (+6.2%).

As for the ranking, Rio Grande do Sul remains in the absolute leadership in value (29.1% share), with almost double that of São Paulo (15.3%). In third place is Paraná (14.1%), followed by Goiás (12.3%).

In area, we also have RS in first, with 26.8% share, followed by PR with 16.5%, SP with 14.7%, and GO with 13.4%.

■ CLOSING REMARKS

As in 2024, exports in August this year once again showed the worst monthly performance. Even in the face of a weak base recorded in the same month of the previous year, there was a retraction of 7.2% in the total exported in August.

The tariff and weak demand have affected business in recent weeks, with impacts on the main destinations. Shipments to the United States in August were the most affected, with a significant drop in the value exported — more than 23% — and a 12% reduction in volume, compared to the monthly average observed until July.

Decreases in exports to China and Italy were also registered this month, although to a lesser extent. In the Chinese case, the retraction was about 16% in value and 17% in volume. For Italy, the decreases were 9% and 10%, respectively, always considering the monthly average up to the previous month as a comparative basis.

We can see that, after just over a month since the increase in tariffs in the United States, the data reveals the significant impact on the leather sector.

On the other hand, the world's largest market for the sector also suffers from recent uncertainties and contradictions. Even with the extension of the tariff agreement between the US and China for another 90 days, officially confirmed by both parties on Monday, August 11, there has not yet been a significant reaction on the part of Chinese importers in purchases -