

FEBRUARY 2025

Brazilian exports of Hides and Skins

Brazilian leather



apexBrasil

MINISTÉRIO DO
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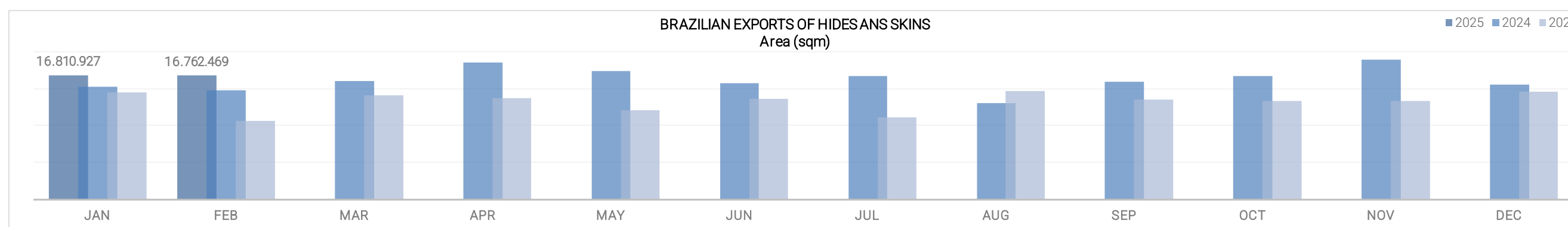
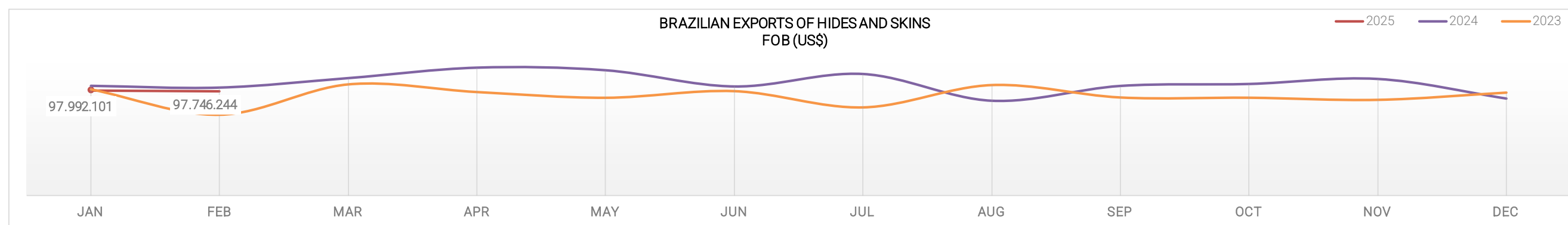
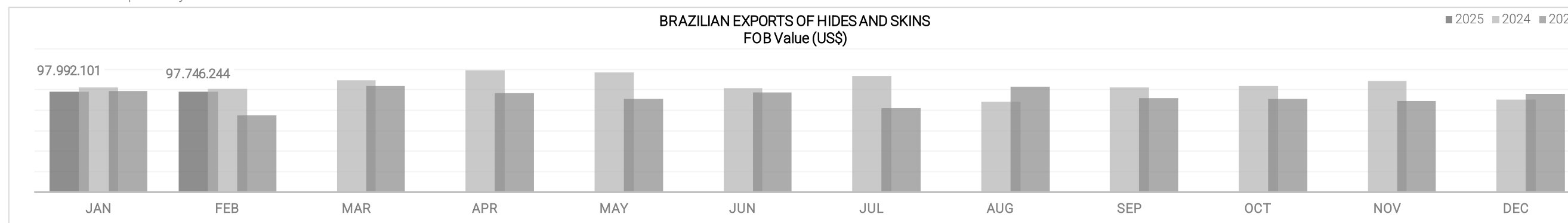
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MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2025	2024	2023	MONTH 2025	2025/2024	2025/2023	2025	2024	2023	MONTH 2025	2025/2024	2025/2023	2025	2024	2023	MONTH 2025	2025/2024	2025/2023
JAN	97.992.101	102.231.845	99.097.256	8,4%	-4,1%	-1,1%	16.810.927	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	97.746.244	100.594.249	75.269.723	-0,3%	-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		109.365.779	103.785.252					16.036.028	14.083.877					48.622.942	36.974.204			
APR		119.059.249	96.588.085					18.558.785	13.705.693					57.604.688	35.449.787			
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	195.738.345	1.256.225.656	1.116.751.780		-3,5%	12,3%	33.573.396	194.452.158	158.963.267		11,7%	33,6%	116.650.634	597.701.152	430.611.610		30,2%	65,2%

Source: SECEX - Prepared by: CICB



■ ANALYSIS OF TOTAL EXPORTS

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Exports of hides and skins, according to data from SECEX (Foreign Trade Secretariat) of the Ministry of Development, Industry, Commerce and Services and analyzed by CICB, reached US\$ 97.7 million in February 2025. This value represents a reduction of 0.3% compared to the previous month, and 2.8% compared to the same period last year, when exports totaled US\$ 100.6 million.

In terms of volume, 16.8 million square meters and 57.5 thousand tons were exported, representing increases of 13.3% and 22.8%, respectively, compared to February 2024. Compared to January, there was a drop of 0.3% in area and 2.7% 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-Feb 2025	Jan-Feb 2024	Jan-Feb 2023	2025	2025/2024	Jan-Feb 2025	Jan-Feb 2024	Jan-Feb 2023	2025	2025/2024	Jan-Feb 2025	Jan-Feb 2024	Jan-Feb 2023	2025	2025/2024
1 China + Hong Kong	66.788.970	63.916.523	56.082.141	34,1%	4,5%	16.337.661	12.727.614	10.835.657	48,7%	28,4%	56.043.594	40.444.755	34.247.835	48,0%	38,6%
China	63.850.542	59.099.848	52.399.910	32,6%	8,0%	15.836.122	11.826.506	9.974.849	47,2%	33,9%	54.761.195	37.690.974	31.977.678	46,9%	45,3%
2 Italy	27.111.197	22.769.802	25.948.049	13,9%	19,1%	5.283.478	3.956.541	4.701.243	15,7%	33,5%	17.926.699	13.045.677	16.791.139	15,4%	37,4%
3 Vietnã	22.595.473	21.103.226	9.071.260	11,5%	7,1%	4.310.783	4.157.175	1.942.384	12,8%	3,7%	10.768.762	10.833.248	4.881.558	9,2%	-0,6%
4 Estados Unidos	22.360.262	30.951.400	28.246.259	11,4%	-27,8%	1.891.510	2.325.487	2.143.496	5,6%	-18,7%	1.687.661	2.015.332	1.895.920	1,4%	-16,3%
5 México	10.109.825	12.231.161	5.711.614	5,2%	-17,3%	869.914	1.302.691	526.615	2,6%	-33,2%	1.030.962	2.248.946	672.502	0,9%	-54,2%
6 Alemanha	5.329.196	7.371.570	6.544.629	2,7%	-27,7%	527.724	604.598	466.984	1,6%	-12,7%	616.962	492.353	392.561	0,5%	25,3%
7 Nigéria	5.314.515	760.546	298.787	2,7%	598,8%	0	0	0	0,0%	-	14.939.144	2.479.420	978.750	12,8%	502,5%
8 Tailândia	3.768.005	7.040.732	7.296.276	1,9%	-46,5%	408.738	782.235	707.908	1,2%	-47,7%	417.242	1.469.174	1.078.519	0,4%	-71,6%
9 Coreia do Sul	2.966.661	4.063.814	6.093.098	1,5%	-27,0%	294.675	403.319	642.396	0,9%	-26,9%	310.745	502.080	877.504	0,3%	-38,1%
Hong Kong	2.938.428	4.816.675	3.682.231	1,5%	-39,0%	501.539	901.108	860.808	1,5%	-44,3%	1.282.399	2.753.781	2.270.157	1,1%	-53,4%
10 Tunísia	2.317.353	1.113.452	1.429.334	1,2%	108,1%	155.632	74.533	87.277	0,5%	108,8%	237.307	107.833	138.725	0,2%	120,1%
11 Espanha	2.257.448	1.091.324	1.217.271	1,2%	106,9%	475.967	314.896	353.739	1,4%	51,2%	1.108.099	706.341	937.181	0,9%	56,9%
12 Hungria	2.174.096	3.717.483	2.534.414	1,1%	-41,5%	224.933	313.883	198.130	0,7%	-28,3%	183.501	262.214	167.571	0,2%	-30,0%
13 Eslováquia	1.982.682	2.090.794	1.462.584	1,0%	-5,2%	148.412	131.503	87.581	0,4%	12,9%	130.443	127.762	89.514	0,1%	2,1%
14 Índia	1.628.319	1.430.609	835.492	0,8%	13,8%	614.079	446.972	186.147	1,8%	37,4%	1.518.285	1.217.150	494.799	1,3%	24,7%
15 Noruega	1.597.843	2.009.678	1.519.149	0,8%	-20,5%	109.316	139.814	99.298	0,3%	-21,8%	81.817	99.047	71.138	0,1%	-17,4%
16 Países Baixos (Holanda)	1.410.244	759.509	1.093.738	0,7%	85,7%	140.118	87.376	120.807	0,4%	60,4%	137.476	81.726	112.022	0,1%	68,2%
17 Uruguai	1.409.810	2.538.446	1.458.394	0,7%	-44,5%	159.095	320.141	166.301	0,5%	-50,3%	503.550	1.134.055	640.746	0,4%	-55,6%
18 Taiwan (Formosa)	1.273.690	2.143.413	2.935.612	0,7%	-40,6%	307.267	427.930	671.035	0,9%	-28,2%	971.153	1.050.145	2.077.053	0,8%	-7,5%
19 Colômbia	1.264.085	412.817	99.774	0,6%	206,2%	259.161	78.161	4.402	0,8%	231,6%	838.035	219.653	26.133	0,7%	281,5%
20 Bangladesh	950.981	1.095.421	473.877	0,5%	-13,2%	74.450	79.598	39.242	0,2%	-6,5%	122.941	105.896	75.038	0,1%	16,1%
21 Camboja	919.822	1.230.517	254.865	0,5%	-25,2%	7.684	18.359	7.782	0,02%	-58,1%	2.574.172	2.700.008	128.107	2,2%	-4,7%
22 África do Sul	845.575	430.004	529.658	0,4%	96,6%	98.365	45.385	54.365	0,3%	116,7%	138.911	68.437	59.750	0,1%	103,0%
23 Portugal	832.605	1.026.342	489.626	0,4%	-18,9%	76.900	72.382	54.574	0,2%	6,2%	145.573	56.882	152.522	0,1%	155,9%
24 Argentina	675.276	450.123	2.483.362	0,3%	50,0%	53.186	22.052	142.982	0,2%	141,2%	65.972	30.480	168.499	0,1%	116,4%
25 França	653.689	608.775	528.058	0,3%	7,4%	32.316	27.865	20.109	0,1%	16,0%	45.717	40.463	31.681	0,04%	13,0%
26 República Dominicana	618.392	384.783	583.991	0,3%	60,7%	100.476	53.696	91.496	0,3%	87,1%	385.364	184.672	295.932	0,3%	108,7%
27 Indonésia	533.515	1.100.180	930.307	0,3%	-51,5%	74.773	166.609	99.712	0,2%	-55,1%	137.163	184.058	77.419	0,1%	-25,5%
28 Canadá	531.557	569.205	705.206	0,3%	-6,6%	32.283	35.215	43.851	0,1%	-8,3%	32.272	29.716	35.166	0,03%	8,6%
29 Malásia	482.328	696.915	944.583	0,2%	-30,8%	52.084	69.837	70.389	0,2%	-25,4%	41.112	61.804	55.956	0,04%	-33,5%
30 Polônia	478.410	272.684	1.389.510	0,2%	75,4%	44.447	24.027	126.562	0,1%	85,0%	39.176	19.620	103.145	0,03%	99,7%
Others (2025: +30 countries)	4.556.521	7.444.846	5.176.061	2,3%	-38,8%	407.969	838.216	432.282	1,2%	-51,3%	3.470.824	7.570.324	2.865.060	3,0%	-54,2%
Total	195.738.345	202.826.094	174.366.979		-3,5%	33.573.396	30.048.110	25.124.746		11,7%	116.650.634	89.589.271	70.619.445		30,2%

Source: MDIC/SECEX - Prepared by: CICB

■ ANALYSIS OF DESTINATIONS

The four main destinations for Brazilian leather presented the following data for the year to date:

China (excluding Hong Kong) has a share of 32.6% (until the previous month it was 34.0%) in value and 47.2% (49.1%) in area, with increases of 8.0% (+16.1%) in value and 33.9% (+40.5%) in area.

Italy, in second place, with a share of 13.9% (14.2%) in value and 15.7% (16.1%) in area, records a growth of 19.1% (+15.3%) in value and 33.5% (+28.0%) in area.

Vietnam in third place, with 11.5% (11.9%) in value and 12.8% (12.4%) in area, showing increases of 7.1% (+21.4%) in value and 3.7% (+1.7%) in area.

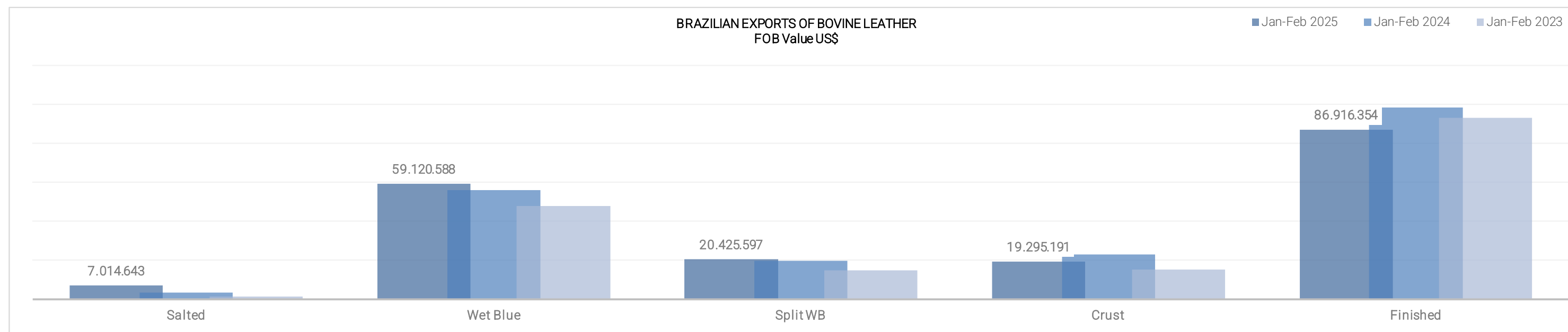
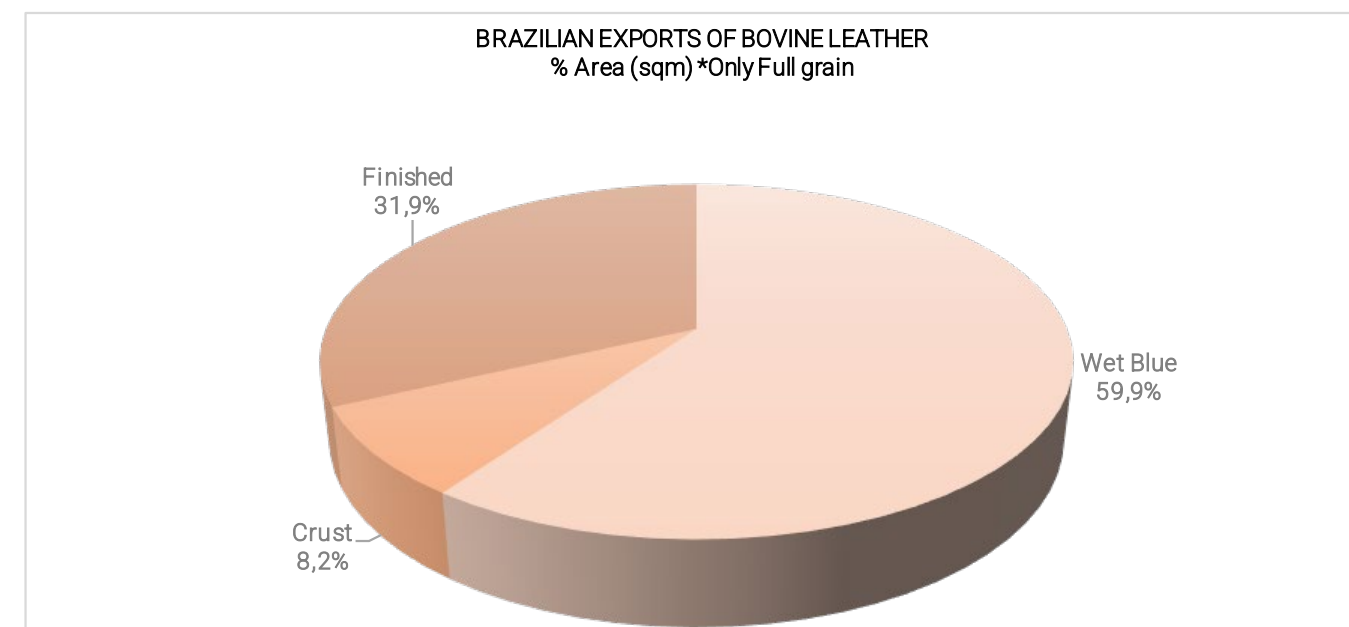
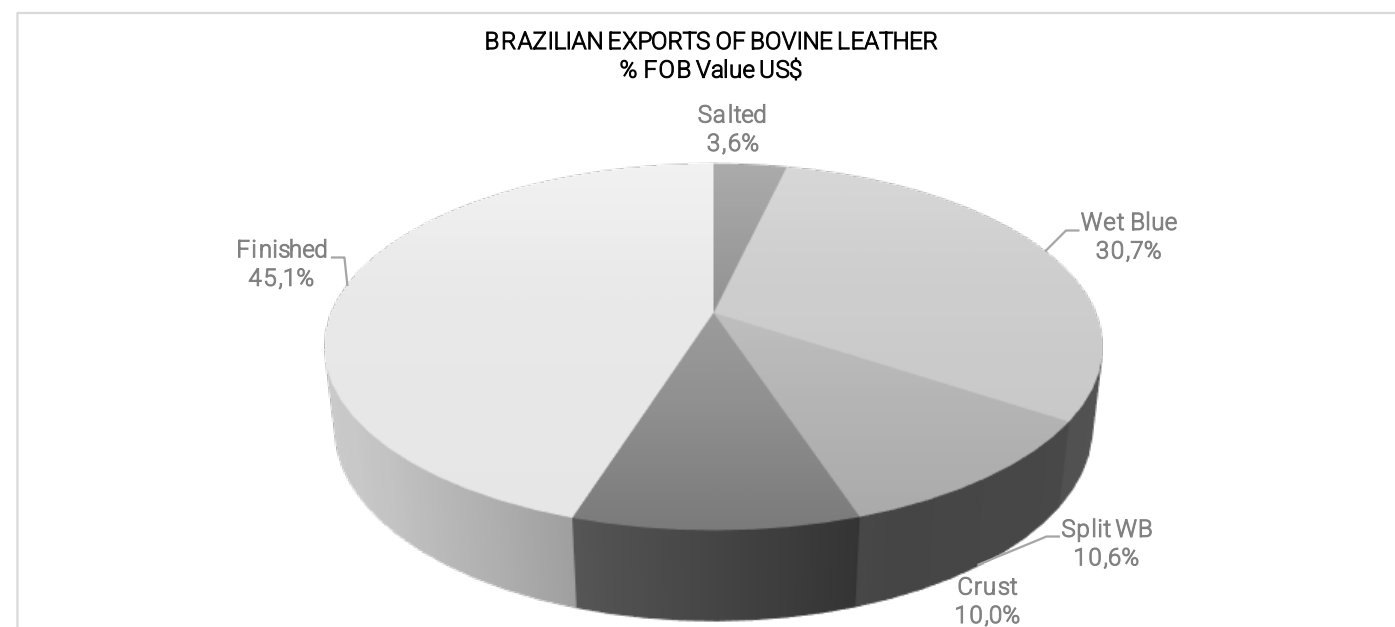
The United States occupies fourth place in the ranking, with 11.4% (10.2%) share in value and 5.6% (5.2%) in area, with falls of 27.8% (-41.4%) in value and 18.7% (-28.3%) in area.

Shipments to China in February saw reductions in value and volume, although they still maintained positive indexes for the two-month period. Exports to Vietnam also performed the same in value, with a decrease compared to the previous month, but still remaining positive. As for Italy, there were improvements for the second consecutive month, signaling a recovery that the sector had been eagerly awaiting. The negative performance for the two-month period continues to be for the USA.

Tunisia now is in 10th in the ranking of destinations, with growth of 108.1% in value and 108.8% in area.

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Feb 2025	Jan-Feb 2024	Jan-Feb 2023	2025/2024	2025/2023	Jan-Feb 2025	Jan-Feb 2024	Jan-Feb 2023	2025/2024	2025/2023	Jan-Feb 2025	Jan-Feb 2024	Jan-Feb 2023	2025/2024	2025/2023
Salted	7.014.643	3.650.894	1.512.668	92,1%	363,7%	-	-	-	-	-	20.824.004	11.511.088	3.452.617	80,9%	503,1%
Wet Blue	59.120.588	55.821.108	47.788.394	5,9%	23,7%	15.872.830	11.794.993	10.431.978	34,6%	52,2%	65.973.363	47.710.783	42.389.073	38,3%	55,6%
Split WB	20.425.597	19.717.233	14.761.603	3,6%	38,4%	6.930.109	7.217.070	5.782.270	-4,0%	19,9%	20.038.866	20.314.664	16.615.485	-1,4%	20,6%
Crust	19.295.191	23.122.120	15.163.843	-16,6%	27,2%	2.166.917	2.265.403	1.252.947	-4,3%	72,9%	2.013.494	2.182.631	1.325.605	-7,7%	51,9%
Finished	86.916.354	98.191.110	92.815.467	-11,5%	-6,4%	8.459.848	8.634.865	7.606.095	-2,0%	11,2%	7.530.452	7.460.157	6.623.005	0,9%	13,7%
Total	192.772.373	200.502.465	172.041.975	-3,9%	12,0%	33.429.704	29.912.331	25.073.290	11,8%	33,3%	116.380.179	89.179.323	70.405.785	30,5%	65,3%

Source: MDIC/SECEX - Prepared by: CICB



■ ANALYSIS OF TYPES OF LEATHER

Brazilian exports of bovine leather by type showed the following variations in the first two months of 2025, compared to the same period in the previous year:

Wet blue, with a share of 30.7% (in January it was 31.8%) in value and 59.9% (61.0%) in area, with increases of 5.9% (+6.3%) in value and 34.6% (+32.5%) in area.

WB split, with a 10.6% (10.4%) share in value, shows an increase of 3.6% (+1.8%) in value, but still a drop of 4.0% (-7.3%) in area.

Crust, with a share of 10.0% (9.6%) in value and 8.2% (7.7%) in area, shows reductions of 16.6% (-19.6%) in value and 4.3% (-6.5%) in area.

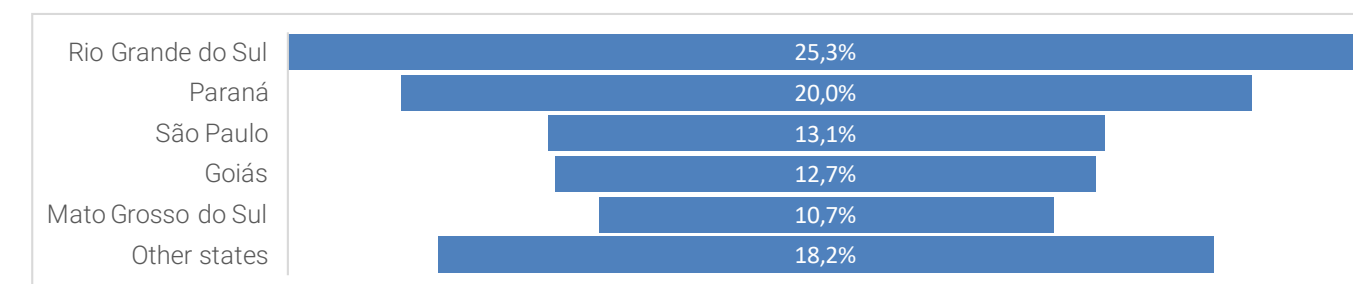
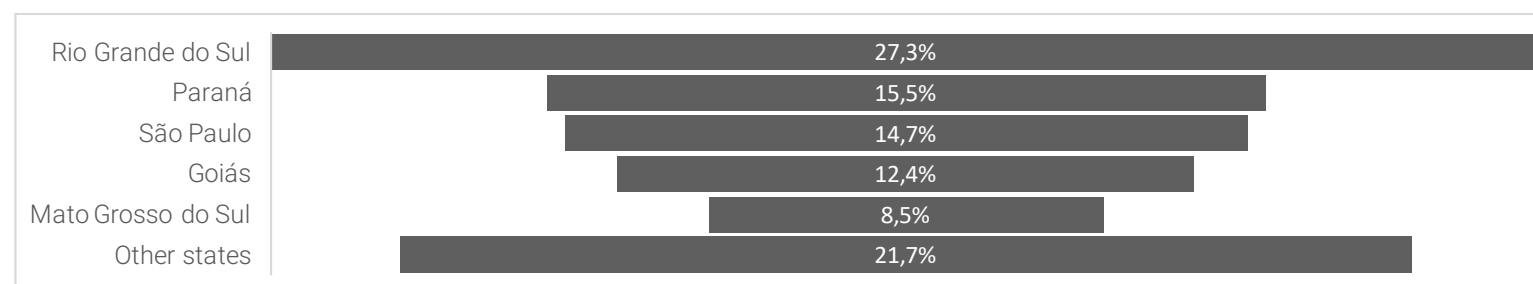
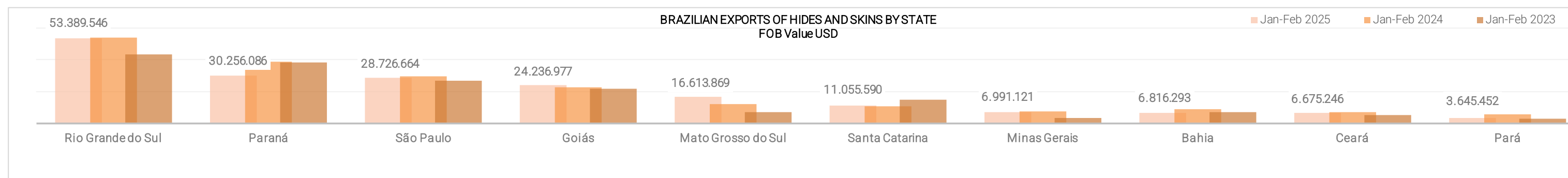
Finished leather, with a share of 45.1% (44.8%) in value and 31.9% (31.4%) in area, has seen drops of 11.5% (-13.2%) in value and 2.0% (-2.5%) in area.

Only wet blue leather has seen increases in shipments for the year in both indicators. WB split has seen an increase in value, but a drop in volume.

Salted hides still show double-digit growth in the annual comparison, accumulating almost double the amount of the first two months of 2024.

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan-Feb 2025	Jan-Feb 2024	Jan-Feb 2023	2025	2025/2024		Jan-Feb 2025	Jan-Feb 2024	Jan-Feb 2023	2025	2025/2024		Jan-Feb 2025	Jan-Feb 2024	Jan-Feb 2023	2025	2025/2024	
1 Rio Grande do Sul	53.389.546	54.051.022	43.442.872	27,3%	-1,2%	8.490.522	7.569.757	5.552.933	25,3%	12,2%	19.795.046	17.812.766	13.406.138	17,0%	11,1%			
2 Paraná	30.256.086	38.800.436	38.261.752	15,5%	-22,0%	6.705.622	6.034.603	6.252.882	20,0%	11,1%	26.228.125	18.284.375	19.043.940	22,5%	43,4%			
3 São Paulo	28.726.664	29.744.473	26.898.508	14,7%	-3,4%	4.394.794	4.214.720	3.687.665	13,1%	4,3%	11.522.127	12.709.121	8.766.027	9,9%	-9,3%			
4 Goiás	24.236.977	22.946.992	21.909.720	12,4%	5,6%	4.269.558	3.298.253	3.148.175	12,7%	29,4%	14.604.833	9.275.800	10.143.508	12,5%	57,5%			
5 Mato Grosso do Sul	16.613.869	12.130.624	7.117.276	8,5%	37,0%	3.594.147	2.337.399	1.653.042	10,7%	53,8%	13.291.153	7.613.296	5.991.715	11,4%	74,6%			
6 Santa Catarina	11.055.590	10.979.167	14.828.444	5,6%	0,7%	1.531.421	1.611.489	1.594.095	4,6%	-5,0%	3.617.909	4.013.880	3.093.725	3,1%	-9,9%			
7 Minas Gerais	6.991.121	7.406.503	3.411.586	3,6%	-5,6%	1.189.416	1.376.342	593.855	3,5%	-13,6%	4.371.103	3.333.134	1.138.660	3,7%	31,1%			
8 Bahia	6.816.293	8.748.652	7.067.419	3,5%	-22,1%	801.419	1.025.979	1.126.327	2,4%	-21,9%	5.341.057	2.863.644	2.282.662	4,6%	86,5%			
9 Ceará	6.675.246	7.014.764	5.123.085	3,4%	-4,8%	707.491	697.460	505.727	2,1%	1,4%	1.225.913	1.056.228	863.899	1,1%	16,1%			
10 Pará	3.645.452	5.880.936	2.804.374	1,9%	-38,0%	1.095.368	1.239.125	600.259	3,3%	-11,6%	7.346.890	6.314.485	2.929.846	6,3%	16,3%			
11 Mato Grosso	3.033.999	2.111.569	995.528	1,6%	43,7%	653.248	419.786	227.460	1,9%	55,6%	2.812.673	1.658.136	836.389	2,4%	69,6%			
12 Rio de Janeiro	1.192.534	534.353	956.535	0,6%	123,2%	13.944	6.103	12.300	0,04%	128,5%	6.816	80.642	5.500	0,01%	-91,5%			
13 Espírito Santo	991.240	0	0	0,5%	-	0	0	0	0,0%	-	2.320.745	0	0	2,0%	-			
14 Piauí	788.578	374.306	251.505	0,4%	110,7%	47.610	20.348	12.223	0,1%	134,0%	168.187	11.378	7.764	0,1%	1378,2%			
15 Rio Grande do Norte	514.569	580.414	338.112	0,3%	-11,3%	0	0	0	0,0%	-	1.672.000	2.122.510	829.400	1,4%	-21,2%			
16 Pernambuco	423.238	577.463	347.950	0,2%	-26,7%	1.567	44.884	12.028	0,005%	-96,5%	1.528.352	1.556.343	632.300	1,3%	-1,8%			
17 Rondônia	219.555	183.825	0	0,1%	19,4%	61.675	49.994	0	0,2%	23,4%	230.880	180.432	0	0,2%	28,0%			
18 Alagoas	75.957	0	0	0,04%	-	0	0	0	0,0%	-	304.500	0	0	0,3%	-			
19 Paraíba	55.777	0	0	0,03%	-	0	0	0	0,0%	-	223.600	0	0	0,2%	-			
20 Maranhão	36.054	225.932	89.742	0,02%	-84,0%	15.594	6.923	26.696	0,05%	125,2%	38.725	214.621	61.097	0,03%	-82,0%			
21 Amazonas	0	498.804	0	0,0%	-100,0%	0	86.569	0	0,0%	-100,0%	0	447.720	0	0,0%	-100,0%			
22 Tocantins	0	0	376.484	0,0%	-	0	0	89.876	0,0%	-	0	0	431.710	0,0%	-100,0%			
Total	195.738.345	202.826.094	174.366.979	100,0%	-3,5%	33.573.396	30.048.110	25.124.746	100,0%	11,7%	116.650.634	89.589.271	70.619.445	100,0%	30,2%			

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



■ ANALYSIS OF STATES

In the first two months of the year, exports from Brazilian states showed the following highlights:

Among the top 10, the largest increase in exports was in Mato Grosso do Sul, with +37.0%, while Pará recorded the largest drop (-38.0%).

In terms of traded area, in addition to Mato Grosso do Sul, with +53.8%, Goiás had significant growth, with +29.4%. Bahia (-21.9%), Minas Gerais (-13.6%) and Pará (-11.6%) showed double-digit decreases.

Among the other states in the ranking, Rio de Janeiro continues to have the highest monetary growth, reaching 123.2% in the year to date.

The state ranking remains unchanged, with Rio Grande do Sul in first place in value (27.3% share) and area (25.3%), followed by Paraná (15.5% and 20.0%, respectively), São Paulo (14.7% and 13.1%) and Goiás (12.4% and 12.7%).

■ CLOSING REMARKS

There was stability in the total value and volume exported by Brazilian tanneries in February, compared to the previous month. However, if we consider the daily average, with US\$ 4.5 million in January (22 working days) compared to US\$ 4.9 million in February (20 working days), we see progress. In terms of weight, the increase was even greater, with 838 thousand square meters in February, compared to 764 thousand in January.

Despite this significant growth, the total values are still at lower levels than in the same period last year, for the second consecutive month.

In terms of markets, we can see that exports of wet blue and finished leather to China show significant growth, increasing total shipments by 8.0% in value and 33.9% in area.

With the growth in shipments to Italy, especially in wet blue and crust leather, the United States is the foremost concern among the main markets, with sharp drops in crust and finished leather in the two-month period.

The uncertainties in tariff and economic disputes, especially between China and the United States, continue to inhibit global trade.

It is easy to understand that the current phase, with frequent changes in rules, has very negative effects for everyone, also impacting the leather sector.

The most important trade fair in the world will take place in March, in the midst of a tariff war, where we will certainly see greater direction in trade throughout the year. -