

JANUARY 2025

Brazilian exports of Hides and Skins

Brazilian leather



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MINISTÉRIO DO
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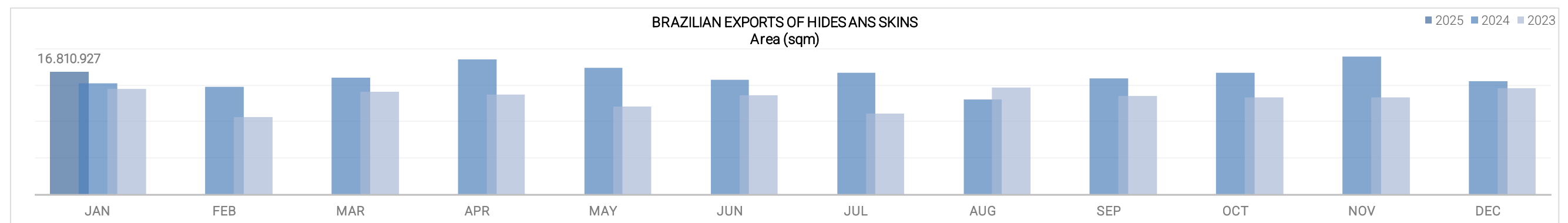
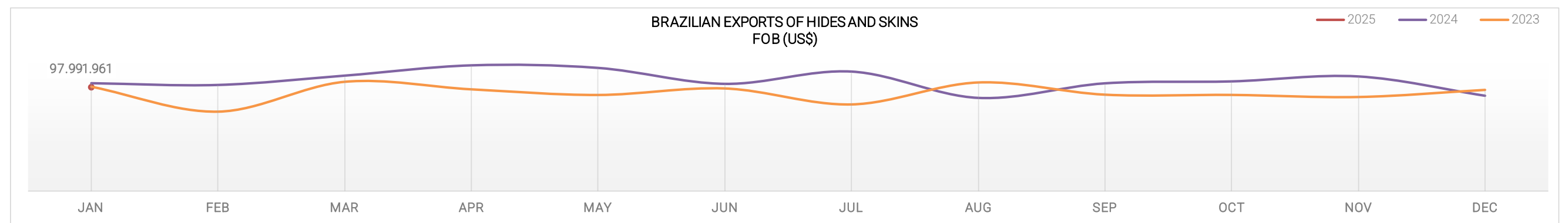
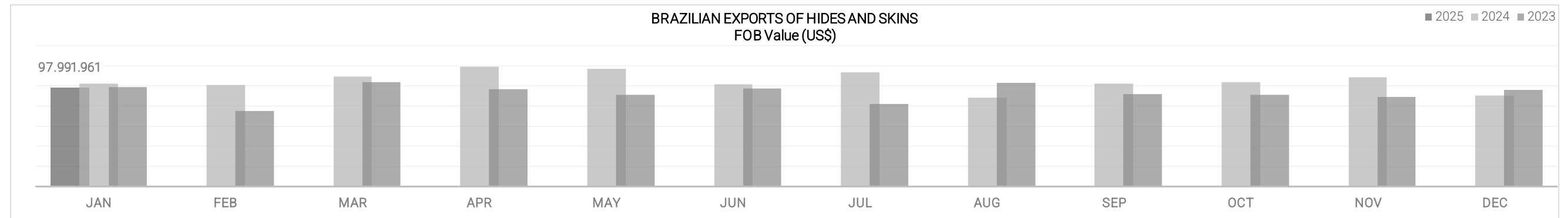
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MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2025	2024	2023	MONTH 2025	2025/2024	2025/2023	2025	2024	2023	MONTH 2025	2025/2024	2025/2023	2025	2024	2023	MONTH 2025	2025/2024	2025/2023
JAN	97.991.961	102.231.845	99.097.256	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		100.594.249	75.269.723					14.792.606	10.666.731					46.844.191	29.776.931			
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	97.991.961	1.256.225.656	1.116.751.780		-4,1%	-1,1%	16.810.927	194.452.158	158.963.267		10,2%	16,3%	59.128.620	597.701.152	430.611.610		38,3%	44,8%

Source: SECEX - Prepared by: CICB



■ ANALYSIS OF TOTAL EXPORTS

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The exports of hides and skins, according to data from SECEX (Secretariat of Foreign Trade) of the Ministry of Development, Industry, Commerce, and Services and analyzed by CICB, reached US\$ 98.0 million in January 2025. This figure represents an increase of 8.4% compared to the previous month, but a decrease of 4.1% compared to the same period last year, when exports totaled US\$ 102.2 million.

In terms of volume, 16.8 million square meters and 59.1 thousand tons were exported, representing increases of 10.2% and 38.3%, respectively, compared to January 2024. Compared to December, there was also growth of 8.2% in area and 18.2% 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 2025	Jan 2024	Jan 2023	2025	2025/2024	Jan 2025	Jan 2024	Jan 2023	2025	2025/2024	Jan 2025	Jan 2024	Jan 2023	2025	2025/2024
1 China + Hong Kong	34.198.309	30.981.709	34.623.359	34,9%	10,4%	8.412.942	6.230.884	6.719.209	50,0%	35,0%	29.344.620	19.717.770	20.970.413	49,6%	48,8%
China	33.349.982	28.723.922	32.731.932	34,0%	16,1%	8.246.655	5.868.199	6.401.705	49,1%	40,5%	28.855.035	18.526.781	20.214.583	48,8%	55,7%
2 Italy	13.938.039	12.087.962	15.461.354	14,2%	15,3%	2.698.544	2.107.825	2.941.644	16,1%	28,0%	9.078.238	7.058.586	10.676.994	15,4%	28,6%
3 Vietnam	11.690.268	9.626.999	4.767.678	11,9%	21,4%	2.087.723	2.053.603	966.671	12,4%	1,7%	5.161.517	5.372.378	2.194.763	8,7%	-3,9%
4 United States	10.043.983	17.149.912	16.138.908	10,2%	-41,4%	873.534	1.218.821	1.179.149	5,2%	-28,3%	788.841	1.072.667	1.013.729	1,3%	-26,5%
5 Mexico	5.117.600	6.944.573	2.038.104	5,2%	-26,3%	395.358	734.150	172.605	2,4%	-46,1%	464.561	1.172.995	209.176	0,8%	-60,4%
6 Germany	3.201.509	2.940.418	3.006.106	3,3%	8,9%	302.168	233.281	207.707	1,8%	29,5%	442.479	189.772	180.667	0,7%	133,2%
7 Nigeria	2.588.614	238.252	219.791	2,6%	986,5%	0	0	0	0,0%	-	7.482.744	790.760	643.050	12,7%	846,3%
8 Thailand	1.564.610	4.269.764	4.242.041	1,6%	-63,4%	172.092	466.536	400.553	1,0%	-63,1%	198.093	822.670	554.361	0,3%	-75,9%
9 South Korea	1.336.345	1.724.700	2.662.348	1,4%	-22,5%	131.881	167.512	228.777	0,8%	-21,3%	134.361	201.767	227.366	0,2%	-33,4%
10 Spain	1.253.472	436.729	539.109	1,3%	187,0%	252.623	157.797	105.021	1,5%	60,1%	570.571	343.207	290.278	1,0%	66,2%
11 Slovakia	1.250.967	1.074.635	734.422	1,3%	16,4%	94.735	66.213	42.498	0,6%	43,1%	82.786	63.896	43.520	0,1%	29,6%
12 Tunisia	1.145.737	364.262	487.282	1,2%	214,5%	77.534	20.154	27.363	0,5%	284,7%	116.604	30.252	44.862	0,2%	285,4%
13 Hungary	889.253	1.762.075	1.794.009	0,9%	-49,5%	85.436	140.895	132.122	0,5%	-39,4%	72.978	120.133	113.090	0,1%	-39,3%
14 Uruguay	866.820	1.324.465	391.852	0,9%	-34,6%	85.042	160.388	35.552	0,5%	-47,0%	226.716	535.056	252.458	0,4%	-57,6%
Hong Kong	848.327	2.257.787	1.891.427	0,9%	-62,4%	166.287	362.685	317.504	1,0%	-54,2%	489.585	1.190.989	755.830	0,8%	-58,9%
15 India	803.594	689.340	610.759	0,8%	16,6%	308.565	206.626	153.548	1,8%	49,3%	769.959	669.835	387.202	1,3%	14,9%
16 Norway	764.785	941.418	969.159	0,8%	-18,8%	52.955	63.147	58.391	0,3%	-16,1%	40.836	44.946	41.919	0,1%	-9,1%
17 Bangladesh	654.199	685.626	473.877	0,7%	-4,6%	56.272	49.396	39.242	0,3%	13,9%	98.163	65.148	75.038	0,2%	50,7%
18 Netherlands	640.549	430.244	419.919	0,7%	48,9%	68.011	47.007	42.559	0,4%	44,7%	67.065	45.666	44.370	0,1%	46,9%
19 Taiwan	557.564	1.142.482	1.488.094	0,6%	-51,2%	132.349	284.462	299.654	0,8%	-53,5%	460.082	749.243	890.546	0,8%	-38,6%
20 Portugal	374.641	548.836	359.886	0,4%	-31,7%	36.445	36.810	44.061	0,2%	-1,0%	64.213	27.085	128.319	0,1%	137,1%
21 Argentina	365.336	250.519	1.701.933	0,4%	45,8%	34.642	12.044	98.893	0,2%	187,6%	38.736	15.937	108.379	0,1%	143,1%
22 South Africa	353.768	234.375	215.743	0,4%	50,9%	53.785	19.597	21.645	0,3%	174,5%	78.082	32.792	23.068	0,1%	138,1%
23 Colombia	350.511	276.450	33.041	0,4%	26,8%	61.150	59.816	1.217	0,4%	2,2%	247.185	173.015	23.620	0,4%	42,9%
24 Switzerland	344.481	1.534.898	0	0,4%	-77,6%	17.486	302.331	0	0,10%	-94,2%	26.955	666.060	0	0,0%	-96,0%
25 France	302.987	254.858	931	0,3%	18,9%	16.614	10.132	18	0,1%	64,0%	20.440	16.207	43	0,0%	26,1%
26 Cambodia	270.183	145.960	86.314	0,3%	85,1%	1.626	6.537	2.867	0,0%	-75,1%	884.150	193.786	2.471	1,5%	356,3%
27 Dominican republic	261.446	219.104	380.905	0,3%	19,3%	37.058	22.362	69.932	0,2%	65,7%	153.068	54.285	244.162	0,3%	182,0%
28 Lithuania	260.999	0	0	0,3%	-	18.111	0	0	0,1%	-	15.210	0	0	0,0%	-
29 Turkey	228.208	400.212	432.943	0,2%	-43,0%	0	0	40.226	0,0%	-	1.276.806	1.535.298	735.696	2,16%	-16,8%
30 Japan	214.659	123.866	451.570	0,2%	73,3%	21.663	8.196	31.870	0,1%	164,3%	18.240	10.791	57.573	0,03%	69,0%
Others (2025: +22 countries)	2.158.525	3.427.202	4.365.819	2,2%	-37,0%	224.583	368.982	395.021	1,3%	-39,1%	704.321	953.077	665.381	1,2%	-26,1%
Total	97.991.961	102.231.845	99.097.256		-4,1%	16.810.927	15.255.504	14.458.015		10,2%	59.128.620	42.745.080	40.842.514		38,3%

Source: MDIC/SECEX - Prepared by: CICB

■ ANALYSIS OF DESTINATIONS

The four main destinations for Brazilian leather presented the following data in the first month of the year:

China (excluding Hong Kong) maintained a share of 34.0% in value and 49.1% in area, with increases of 16.1% in value and 40.5% in area.

Italy returned to the second position, with a share of 14.2% in value and 16.1% in area, recording a growth of 15.3% in value and 28.0% in area.

Vietnam ranked third, with 11.9% in value and 12.4% in area, showing increases of 21.4% in value and 1.7% in area.

The United States occupies the fourth place in the ranking, with a 10.2% share in value and 5.2% in area, experiencing declines of 41.4% in value and 28.3% in area.

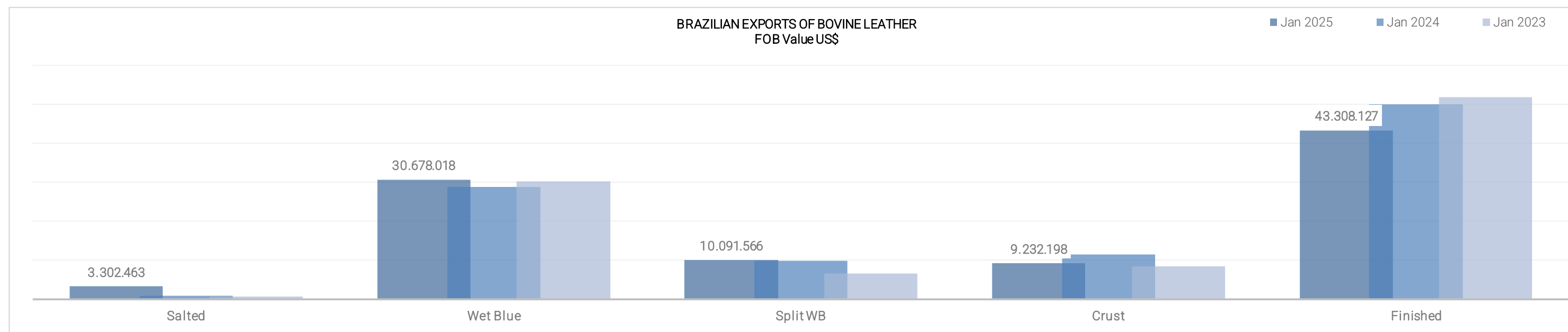
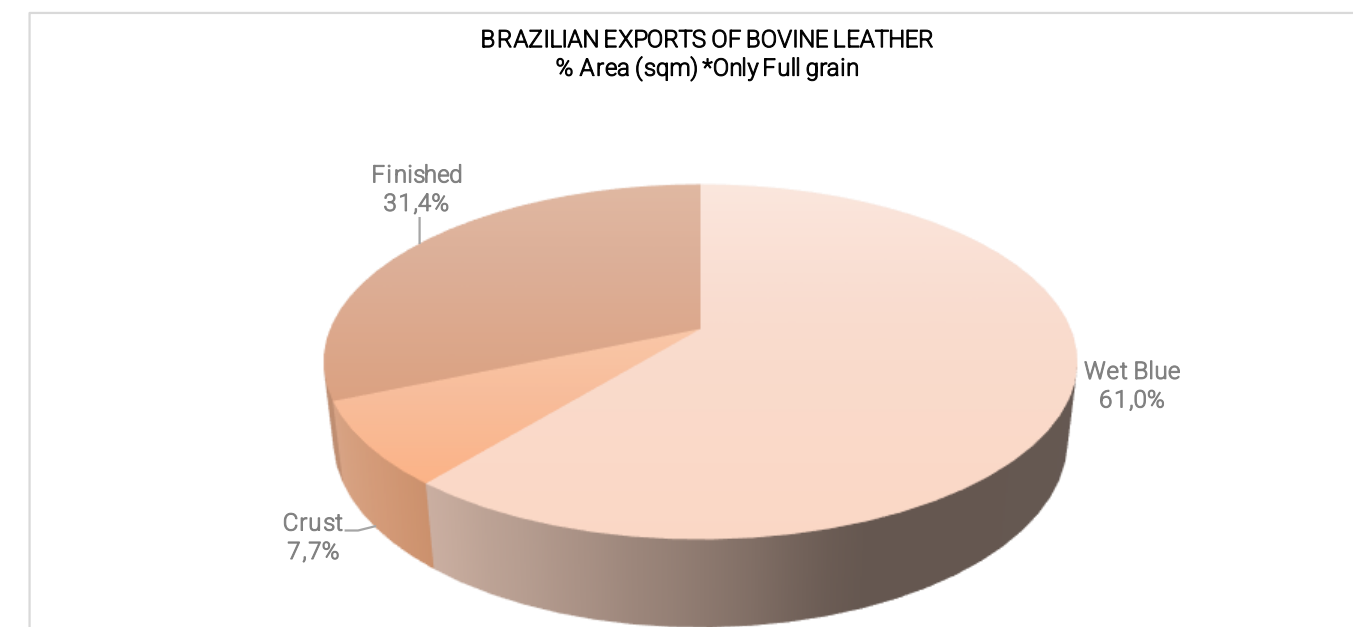
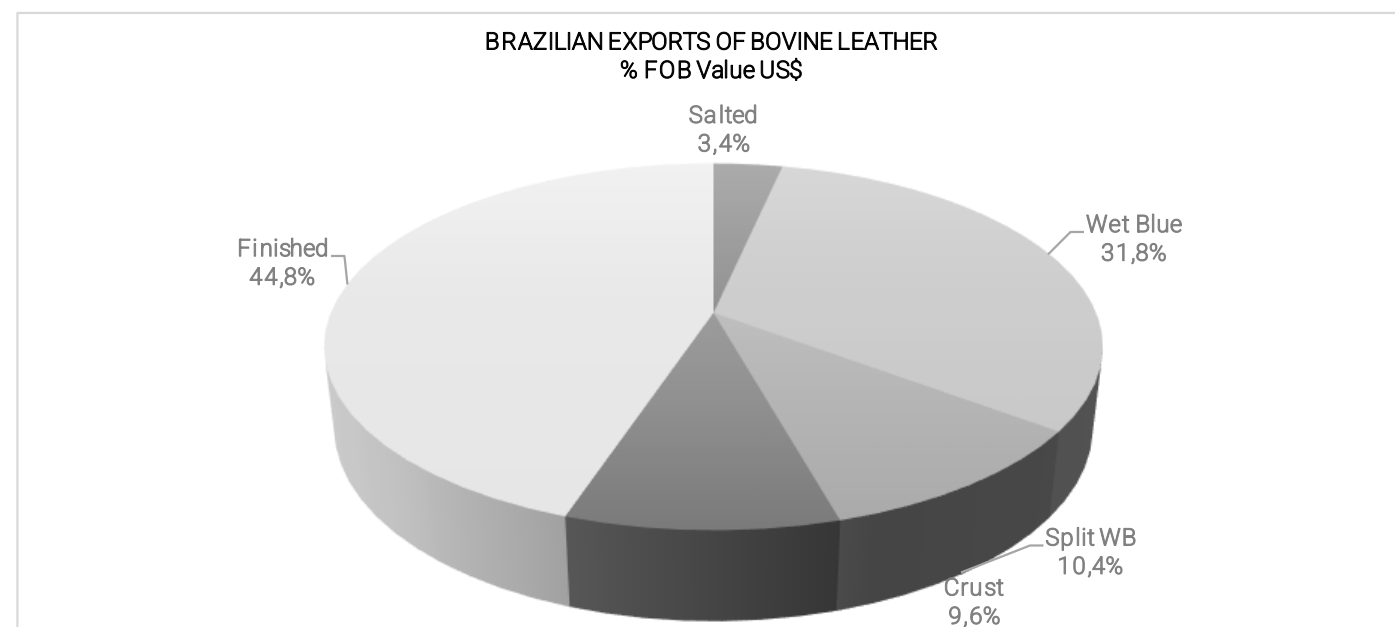
Despite the effects of the Chinese New Year, shipments to China continued to grow, both in value and volume. The United States was the only one among the four main markets to record a decline in purchases of Brazilian leather, allowing Vietnam to surpass the Americans in the ranking of destinations.

Among the other countries in the TOP 10, a highlight was the growing demand for salted hides in Nigeria, which recorded an impressive increase of 986.5% in value and 846.3% in weight.

As for leather shipments, Spain saw a significant recovery, with a growth of +187.0% in value and +60.1% in area.

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan 2025	Jan 2024	Jan 2023	2025/2024	2025/2023	Jan 2025	Jan 2024	Jan 2023	2025/2024	2025/2023	Jan 2025	Jan 2024	Jan 2023	2025/2024	2025/2023
Salted	3.302.463	938.314	703.383	252,0%	369,5%	-	-	-	-	-	10.358.523	3.182.392	1.610.100	225,5%	543,3%
Wet Blue	30.678.018	28.862.402	30.201.158	6,3%	1,6%	8.203.072	6.192.390	6.778.754	32,5%	21,0%	34.355.421	24.378.104	27.099.786	40,9%	26,8%
Split WB	10.091.566	9.910.232	6.619.113	1,8%	52,5%	3.265.102	3.522.837	2.724.846	-7,3%	19,8%	9.546.825	10.138.500	7.641.499	-5,8%	24,9%
Crust	9.232.198	11.489.067	8.369.006	-19,6%	10,3%	1.030.545	1.102.569	704.565	-6,5%	46,3%	960.570	1.028.171	753.063	-6,6%	27,6%
Finished	43.308.127	49.901.474	51.784.359	-13,2%	-16,4%	4.224.737	4.331.065	4.221.475	-2,5%	0,1%	3.742.709	3.715.553	3.624.272	0,7%	3,3%
Total	96.612.372	101.101.489	97.677.019	-4,4%	-1,1%	16.723.456	15.148.861	14.429.640	10,4%	15,9%	58.964.048	42.442.720	40.728.720	38,9%	44,8%

Source: MDIC/SECEX - Prepared by: CICB



■ ANALYSIS OF TYPES OF LEATHER

Brazilian exports of bovine leather by type showed the following variations in January 2025, compared to the same month of the previous year:

Wet blue, with a share of 31.8% in value and 61.0% in area, recorded increases of 6.3% in value and 32.5% in area.

WB split, with a 10.4% share in value, saw an increase of 1.8% in value but a decrease of 7.3% in area.

Crust, with a share of 9.6% in value and 7.7% in area, experienced a reduction of 19.6% in value and 6.5% in area.

Finished leather, with a share of 44.8% in value and 31.4% in area, recorded a decrease of 13.2% in value and 2.5% in area.

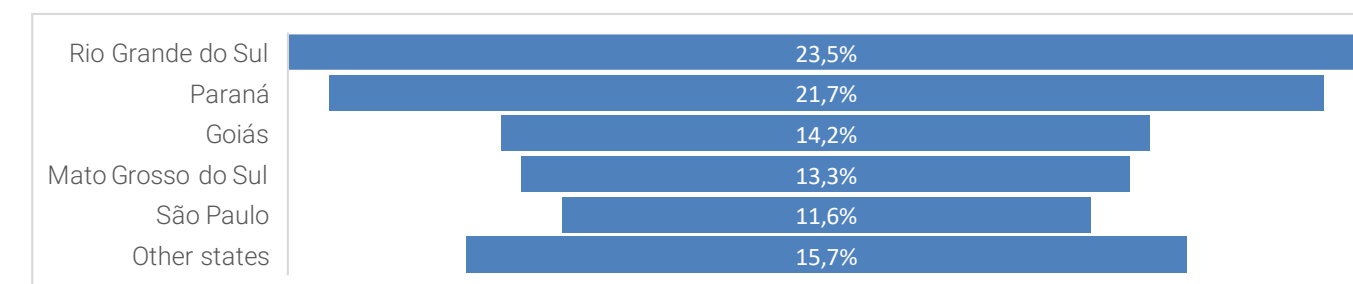
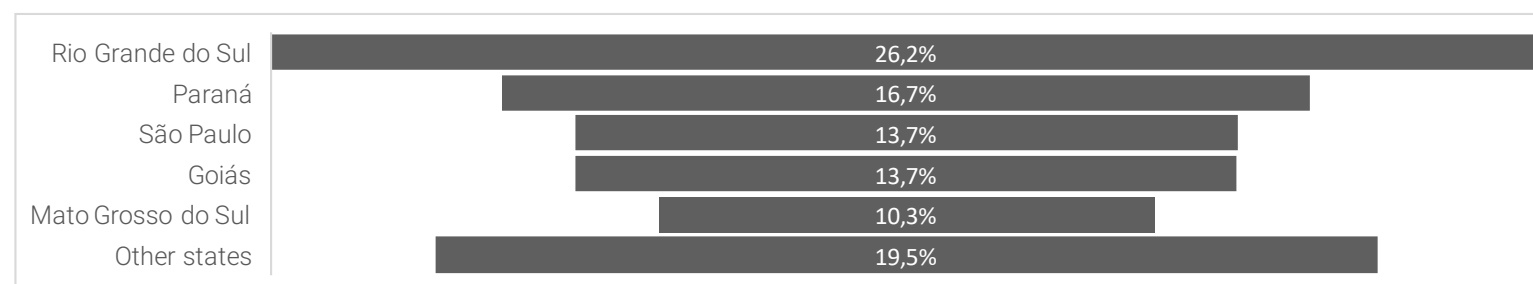
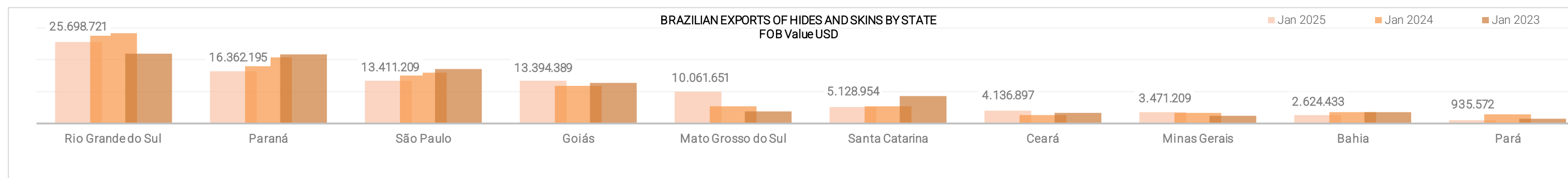
The first month of the year indicates that wet blue leather continues to gain share in Brazilian shipments in the sector, while the semi-finished and finished segments experienced declines.

Salted hides showed growth of more than three times the value and volume exported in January of last year.

Regarding other types of hides, there were increases in the exports of sheep, goat, and other animal skins (including reptile skins).

	FOB VALUE (US\$)					Δ	AREA (sqm)					Δ	WEIGHT (KG)					Δ
	Jan 2025	Jan 2024	Jan 2023	2025	2025/2024		Jan 2025	Jan 2024	Jan 2023	2025	2025/2024		Jan 2025	Jan 2024	Jan 2023	2025	2025/2024	
1 Rio Grande do Sul	25.698.721	28.313.608	21.985.233	26,2%	-9,2%	3.952.182	3.789.903	2.906.828	23,5%	4,3%	9.300.457	8.762.941	7.265.165	15,7%	6,1%			
2 Paraná	16.362.195	20.806.601	21.740.053	16,7%	-21,4%	3.652.072	3.204.416	3.369.946	21,7%	14,0%	14.783.300	9.071.493	10.193.260	25,0%	63,0%			
3 São Paulo	13.411.209	15.971.478	17.073.612	13,7%	-16,0%	1.942.716	2.521.545	2.632.569	11,6%	-23,0%	4.949.825	6.387.815	6.172.289	8,4%	-22,5%			
4 Goiás	13.394.389	11.770.438	12.852.878	13,7%	13,8%	2.379.120	1.597.211	1.902.745	14,2%	49,0%	8.688.956	4.250.951	6.606.446	14,7%	104,4%			
5 Mato Grosso do Sul	10.061.651	5.301.859	3.844.327	10,3%	89,8%	2.238.252	1.064.545	885.182	13,3%	110,3%	8.112.608	3.690.513	3.116.695	13,7%	119,8%			
6 Santa Catarina	5.128.954	5.477.757	8.661.738	5,2%	-6,4%	727.145	827.431	867.716	4,3%	-12,1%	1.778.922	2.133.038	1.626.233	3,0%	-16,6%			
7 Ceará	4.136.897	2.552.981	3.272.149	4,2%	62,0%	451.769	184.384	378.508	2,7%	145,0%	709.315	215.942	755.059	1,2%	228,5%			
8 Minas Gerais	3.471.209	3.381.875	2.321.859	3,5%	2,6%	599.978	629.211	393.377	3,6%	-4,6%	2.601.382	1.640.371	817.206	4,4%	58,6%			
9 Bahia	2.624.433	3.603.375	3.660.654	2,7%	-27,2%	241.966	453.346	533.580	1,4%	-46,6%	1.783.773	952.025	991.214	3,0%	87,4%			
10 Pará	935.572	2.947.342	1.569.072	1,0%	-68,3%	358.892	670.613	345.073	2,1%	-46,5%	2.163.975	3.227.705	1.666.833	3,7%	-33,0%			
11 Mato Grosso	833.678	997.810	410.053	0,9%	-16,4%	209.424	198.307	110.618	1,2%	5,6%	799.184	759.356	351.640	1,4%	5,2%			
12 Espírito Santo	503.854	0	0	0,5%	-	0	0	0	0,0%	-	1.159.775	0	0	2,0%	-			
13 Rio de Janeiro	481.369	210.672	694.000	0,5%	128,5%	5.380	2.100	8.800	0,03%	156,2%	2.768	78.729	3.926	0,005%	-96,5%			
14 Rio Grande do Norte	322.481	223.109	219.885	0,3%	44,5%	0	0	0	0,0%	-	1.148.000	819.050	493.400	1,9%	40,2%			
15 Piauí	268.543	261.988	163.820	0,3%	2,5%	24.166	15.125	7.570	0,1%	59,8%	29.816	8.232	4.384	0,1%	262,2%			
16 Pernambuco	192.982	191.268	183.355	0,2%	0,9%	0	38.997	7.446	0,0%	-100,0%	700.310	525.727	318.879	1,2%	33,2%			
17 Alagoas	55.265	0	0	0,1%	-	0	0	0	0,0%	-	221.550	0	0	0,4%	-			
18 Rondônia	44.629	183.825	0	0,05%	-75,7%	12.271	49.994	0	0,1%	-75,5%	44.229	180.432	0	0,1%	-75,5%			
19 Maranhão	36.054	0	87.957	0,04%	-	15.594	0	26.696	0,1%	-	38.725	0	60.880	0,1%	-			
20 Paraíba	27.876	0	0	0,03%	-	0	0	0	0,0%	-	111.750	0	0	0,2%	-			
21 Distrito Federal	0	35.859	65.106	0,0%	-100,0%	0	8.376	12.545	0,0%	-100,0%	0	40.760	65.840	0,0%	-100,0%			
22 Tocantins	0	0	291.505	0,0%	-	0	0	68.816	0,0%	-	0	0	333.165	0,0%	-			
Total	97.991.961	102.231.845	99.097.256	100,0%	-4,1%	16.810.927	15.255.504	14.458.015	100,0%	10,2%	59.128.620	42.745.080	40.842.514	100,0%	38,3%			

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



■ ANALYSIS OF STATES

In January, the exports from Brazilian states showed the following highlights:

Among the top 10, the largest increases in value were recorded by Mato Grosso do Sul (+89.8%) and Ceará (+62.0%). On the other hand, the states of Pará (-68.3%), Bahia (-27.2%), and Paraná (-21.4%) showed more significant declines.

In terms of area shipped, the largest growths were again in Ceará (+145.0%) and Mato Grosso do Sul (+110.3%). In contrast, the most significant reductions occurred in Bahia (-46.6%) and Pará (-46.5%).

Among the other states, the largest monetary growth was recorded by Rio de Janeiro, with an increase of +128.5%, while Rondônia experienced the largest decline, with -75.7%.

The state ranking for the beginning of the year shows Rio Grande do Sul in first place, with a 26.2% share in value and 23.0% in area, followed by Paraná, with a share of 16.7% in value and 21.7% in area. São Paulo occupies the third position in value, with a slight advantage over Paraná, at 13.69% compared to 13.67%. In area, Goiás ranks third, with a 14.2% share, followed by Mato Grosso do Sul, with 13.3%. In weight, Paraná leads with 25%, followed by Rio Grande do Sul with 15.7%.

■ CLOSING REMARKS

The first month of the year does not provide an in-depth analysis of market trends and the origins of Brazilian exports. However, it is possible to observe that the markets that were on the rise in the previous year continue to show a positive trend for the upcoming year. On the other hand, those that still face challenges, begin the year in a situation that remains concerning for Brazilian exporters.

China, the world's largest market for hides and skins and also the primary destination for Brazilian leather, continues to see an increase in purchases, a trend that has persisted into 2024. Although the Lunar New Year has significantly impacted business, exports from Brazil have continued, with expectations for the arrival of goods following the conclusion of this period of festivities and travels.

Another Asian market with great potential and expansion is Vietnam, which continues to record double-digit increases in the value and volume of Brazilian exports, after nearly doubling its figures last year compared to the previous year. Italy, despite still facing challenges in Europe, continues to show significant demand for the sector, advancing in the first month of the year and occupying the second position in the ranking.

On the other hand, the United States figures are following an opposite trajectory, showing a decline in demand for finished leather, as evidenced by the total shipments of this type of product.

The search for less traditional markets remains the best strategy for exporters, who have been directing their commercial efforts with greater focus on alternative destinations in Asia and Eastern Europe. -