

JULY 2025

Brazilian exports of Hides and Skins

Brazilian leather

apexBrasil

MINISTRY OF
DEVELOPMENT,
INDUSTRY, TRADE
AND SERVICES

BRAZILIAN GOVERNMENT
BRASIL
UNITING AND REBUILDING

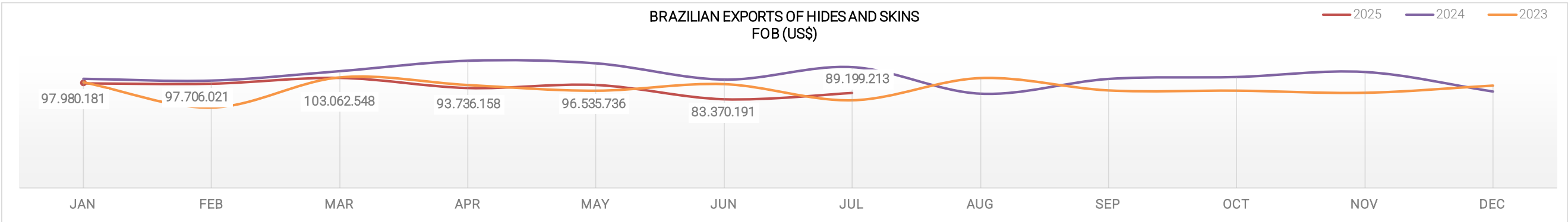
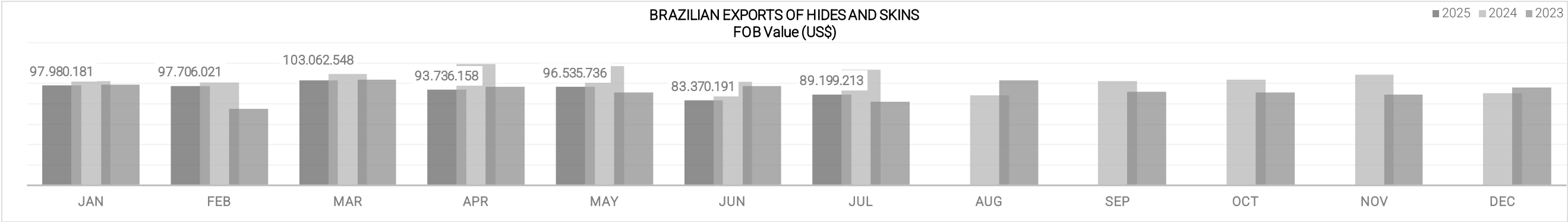
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SUMMARY		PAGE
1	BRAZILIAN EXPORTS OF HIDES AND SKINS - CHAPTER CODE 41.....	3
	ANALYSIS OF TOTAL EXPORTS.....	4
2	BRAZILIAN EXPORTS OF HIDES AND SKINS BY DESTINATION.....	5
	ANALYSIS OF MAIN DESTINATIONS.....	6
3	BRAZILIAN EXPORTS OF BOVINE LEATHER BY TYPE.....	7
	ANALYSIS OF TYPES OF LEATHER.....	8
4	BRAZILIAN EXPORTS OF HIDES AND SKINS BY STATE.....	9
	ANALYSIS OF STATES.....	10
	CLOSING REMARKS	11

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	97.980.181	102.231.845	99.097.256	8,3%	-4,2%	-1,1%	16.804.623	15.255.504	14.458.015	8,1%	10,2%	16,2%	59.128.332	42.745.080	40.842.514	18,2%	38,3%	44,8%
FEB	97.706.021	100.594.249	75.269.723	-0,3%	-2,9%	29,8%	16.756.946	14.792.606	10.666.731	-0,3%	13,3%	57,1%	57.507.831	46.844.191	29.776.931	-2,7%	22,8%	93,1%
MAR	103.062.548	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	93.736.158	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	96.535.736	116.642.884	91.214.382	3,0%	-17,2%	5,8%	14.810.106	17.328.197	12.063.660	-0,6%	-14,5%	22,8%	44.951.778	52.802.187	31.339.687	-5,7%	-14,9%	43,4%
JUN	83.370.191	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	89.199.213	113.124.002	82.168.631	7,0%	-21,1%	8,6%	14.246.914	16.661.127	11.107.588	6,2%	-14,5%	28,3%	45.301.005	46.784.480	29.554.021	12,4%	-3,2%	53,3%
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	661.590.048	1.256.057.257	1.116.751.780		-13,2%	2,5%	107.216.532	194.441.415	158.963.267		-6,3%	19,5%	351.321.647	597.691.046	430.611.610		2,0%	47,6%

Source: SECEX - Prepared by: CICB



■ ANALYSIS OF TOTAL EXPORTS

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Exports of hides and skins in July 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\$ 89.2 million.

This value represents a positive change of 7.0% compared to the previous month, but a decrease of 21.1% compared to the same period last year, when exports totaled US\$ 113.1 million.

In volume, 14.2 million square meters and 45.3 thousand tons were exported, which represent decreases of 14.5% and 3.2%, respectively, compared to July 2024. Compared to June of this year, there were increases of 6.2% in the area and 12.4% in weight.

The period from January to July this year totaled US\$ 661.6 million, 13.2% below the same interval in 2024, also with a decrease of 6.3% in area, but an increase of 2.0% in weight.

COUNTRIES	FOB VALUE (US\$)			Share		Δ	AREA (sqm)			Share		Δ	WEIGHT (KG)			Share		Δ
	Jan-Jul 2025	Jan-Jul 2024	Jan-Jul 2023	2025	2025/2024		Jan-Jul 2025	Jan-Jul 2024	Jan-Jul 2023	2025	2025/2024		Jan-Jul 2025	Jan-Jul 2024	Jan-Jul 2023	2025	2025/2024	
1 China + Hong Kong	206.252.313	248.735.288	201.107.752	31,2%	-17,1%		49.156.078	49.233.897	38.054.351	45,8%	-0,2%		158.056.135	157.052.752	113.715.896	45,0%	0,6%	
China	196.613.039	232.580.001	180.424.830	29,7%	-15,5%		47.195.900	46.267.328	34.114.421	44,0%	2,0%		152.941.283	148.709.380	103.784.718	43,5%	2,8%	
2 United States	94.585.874	105.878.471	106.776.188	14,3%	-10,7%		7.755.233	8.144.672	7.986.670	7,2%	-4,8%		6.903.808	7.239.058	7.092.264	2,0%	-4,6%	
3 Italy	73.684.334	87.982.341	77.287.152	11,1%	-16,3%		13.960.512	14.822.190	13.127.515	13,0%	-5,8%		45.490.549	47.484.339	41.887.944	12,9%	-4,2%	
4 Vietnam	68.262.331	81.283.502	37.828.703	10,3%	-16,0%		13.305.994	16.367.207	7.585.741	12,4%	-18,7%		32.454.261	39.278.306	18.232.576	9,2%	-17,4%	
5 Mexico	34.721.181	42.126.292	28.427.395	5,2%	-17,6%		3.090.240	4.162.668	2.790.387	2,9%	-25,8%		3.846.426	5.805.996	3.945.728	1,1%	-33,8%	
6 Nigeria	18.639.686	3.894.932	1.411.139	2,8%	378,6%		0	0	0	0,0%	-		46.689.913	12.608.142	4.494.751	13,3%	270,3%	
7 Germany	15.241.416	19.899.178	19.373.612	2,3%	-23,4%		1.494.675	1.629.095	1.470.499	1,4%	-8,3%		1.950.240	1.371.942	1.247.385	0,6%	42,2%	
8 South Korea	14.539.613	10.320.262	30.184.665	2,2%	40,9%		1.463.918	980.479	2.832.256	1,4%	49,3%		1.447.354	1.078.741	3.313.928	0,4%	34,2%	
9 Thailand	13.886.681	25.755.788	23.875.054	2,1%	-46,1%		1.641.879	3.215.196	2.451.966	1,5%	-48,9%		2.055.242	8.421.851	4.479.709	0,6%	-75,6%	
Hong Kong	9.639.274	16.155.287	20.682.922	1,5%	-40,3%		1.960.178	2.966.569	3.939.930	1,8%	-33,9%		5.114.852	8.343.372	9.931.178	1,5%	-38,7%	
10 Spain	8.791.706	5.335.515	5.395.287	1,3%	64,8%		2.105.048	1.281.601	1.380.141	2,0%	64,3%		5.341.554	3.373.184	3.962.991	1,5%	58,4%	
11 Norway	8.052.924	6.370.919	4.492.213	1,2%	26,4%		548.024	433.436	311.589	0,5%	26,4%		411.624	305.961	219.224	0,1%	34,5%	
12 Slovakia	7.289.092	8.118.551	4.935.256	1,1%	-10,2%		542.203	544.601	310.206	0,5%	-0,4%		482.338	512.861	306.391	0,1%	-6,0%	
13 Uruguay	7.170.017	8.143.100	6.378.440	1,1%	-11,9%		859.473	1.047.344	781.264	0,8%	-17,9%		2.198.218	4.140.027	2.728.343	0,6%	-46,9%	
14 Hungary	7.136.084	12.076.852	13.107.150	1,1%	-40,9%		707.462	1.047.283	1.054.040	0,7%	-32,4%		583.420	874.596	912.006	0,2%	-33,3%	
15 Taiwan	6.965.527	9.592.442	9.584.639	1,1%	-27,4%		1.595.563	1.976.523	2.369.109	1,5%	-19,3%		4.851.220	6.496.699	6.865.249	1,4%	-25,3%	
16 Tunisia	6.833.215	8.184.792	6.880.554	1,0%	-16,5%		429.262	525.290	438.300	0,4%	-18,3%		664.412	775.263	676.079	0,2%	-14,3%	
17 Argentina	6.560.571	3.565.127	7.060.494	1,0%	84,0%		643.164	238.561	513.347	0,6%	169,6%		886.947	297.650	611.469	0,3%	198,0%	
18 India	6.241.363	5.652.202	4.767.801	0,9%	10,4%		1.964.155	1.459.566	998.357	1,8%	34,6%		4.835.968	4.156.159	3.234.432	1,4%	16,4%	
19 Cambodia	5.413.374	4.496.770	2.123.139	0,8%	20,4%		612.230	120.942	176.733	0,6%	406,2%		7.764.337	8.264.042	1.372.255	2,2%	-6,0%	
20 Bangladesh	4.246.692	4.003.190	1.206.912	0,6%	6,1%		352.404	314.659	87.260	0,3%	12,0%		512.744	520.551	136.395	0,1%	-1,5%	
21 Netherlands	4.070.578	5.511.609	6.331.110	0,6%	-26,1%		452.977	546.342	637.888	0,4%	-17,1%		447.201	537.042	618.440	0,1%	-16,7%	
22 Portugal	3.837.295	3.702.686	2.794.178	0,6%	3,6%		308.247	302.836	278.087	0,3%	1,8%		467.739	441.723	724.599	0,1%	5,9%	
23 Poland	3.668.765	3.792.953	3.583.197	0,6%	-3,3%		338.612	336.854	328.015	0,3%	0,5%		277.951	288.502	265.531	0,1%	-3,7%	
24 Indonesia	3.560.204	8.432.815	2.619.379	0,5%	-57,8%		626.939	1.392.928	330.129	0,6%	-55,0%		1.391.736	2.459.061	249.239	0,4%	-43,4%	
25 Turkey	2.760.249	4.368.089	3.830.731	0,4%	-36,8%		10.415	25.431	62.106	0,0%	-59,0%		10.602.256	14.027.281	8.182.515	3,0%	-24,4%	
26 Colombia	2.524.159	2.564.962	796.710	0,4%	-1,6%		481.303	423.294	90.031	0,4%	13,7%		1.542.861	1.261.628	267.898	0,4%	22,3%	
27 France	2.426.084	2.372.752	2.807.593	0,4%	2,2%		111.522	106.416	120.980	0,1%	4,8%		172.422	160.185	178.063	0,0%	7,6%	
28 South Africa	2.392.156	1.780.929	2.603.551	0,4%	34,3%		303.983	212.932	274.941	0,3%	42,8%		466.476	261.158	403.418	0,13%	78,6%	
29 Dominican republic	2.377.751	1.754.276	1.116.315	0,4%	35,5%		353.040	258.213	141.113	0,3%	36,7%		1.262.993	951.581	376.828	0,4%	32,7%	
30 Canada	2.254.087	2.523.384	2.679.714	0,3%	-10,7%		140.870	159.022	163.634	0,1%	-11,4%		131.222	184.081	146.801	0,04%	-28,7%	
Others (2025: +41 countries)	17.204.726	24.319.672	24.185.028	2,6%	-29,3%		1.861.107	3.066.995	2.546.240	1,7%	-39,3%		7.132.080	13.684.279	7.097.148	2,0%	-47,9%	
Total	661.590.048	762.539.641	645.551.051		-13,2%		107.216.532	114.376.473	89.692.895		-6,3%		351.321.647	344.314.641	237.945.495		2,0%	

■ ANALYSIS OF DESTINATIONS

The three main destinations for Brazilian leather presented the following data in the seven-month period:

China (excluding Hong Kong) has a share of 29.7% (previously 29.6%) in value and 44.0% (43.7%) in area, down 15.5% (-12.7%) in value, but still up 2.0% (+3.6%) in area.

The United States is in second place in the ranking, with 14.3% (13.6%) of share in value and 7.2% (6.9%) in area, with a decrease of 10.7% (-10.6%) in value and 4.8% (-3.4%) in area.

Italy in third, with a share of 11.1% (12.3%) in value and 13.0% (14.3%) in area, has decreases of 16.3% (-13.2%) in value and 5.8% (-3.0%) in area.

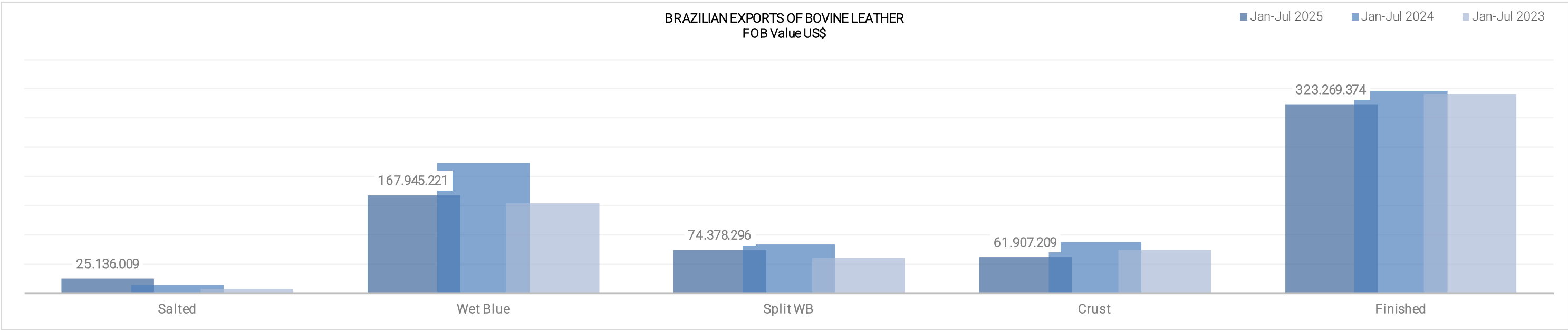
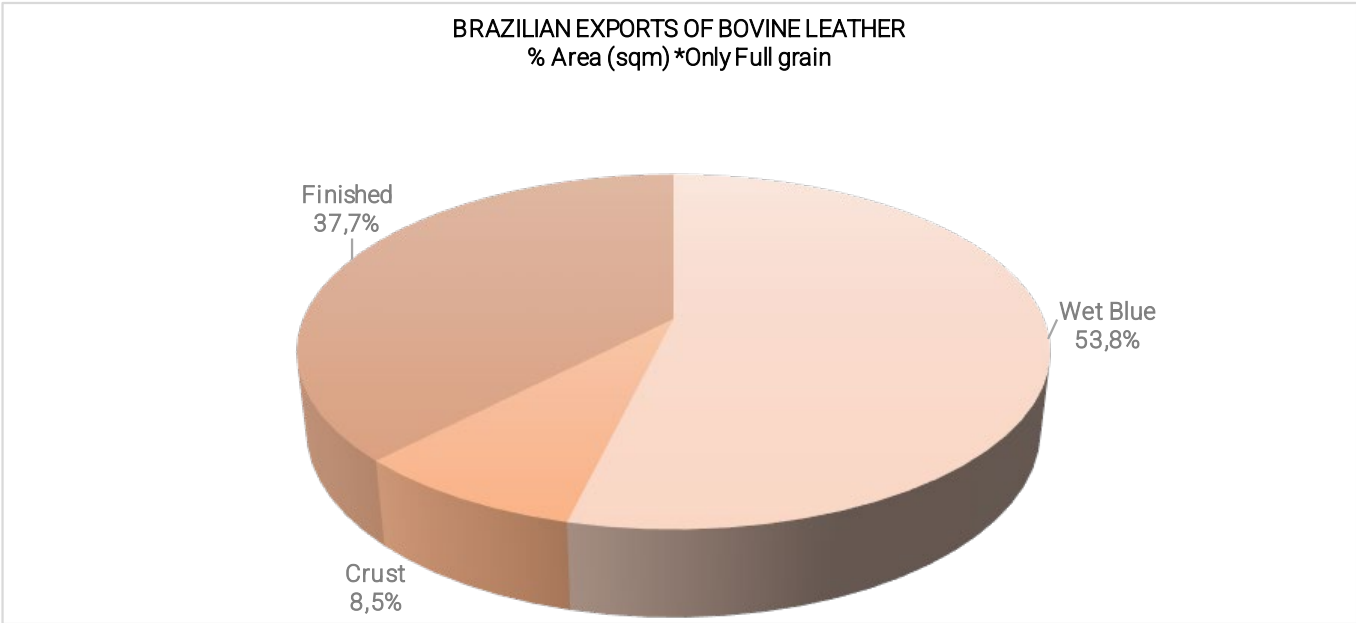
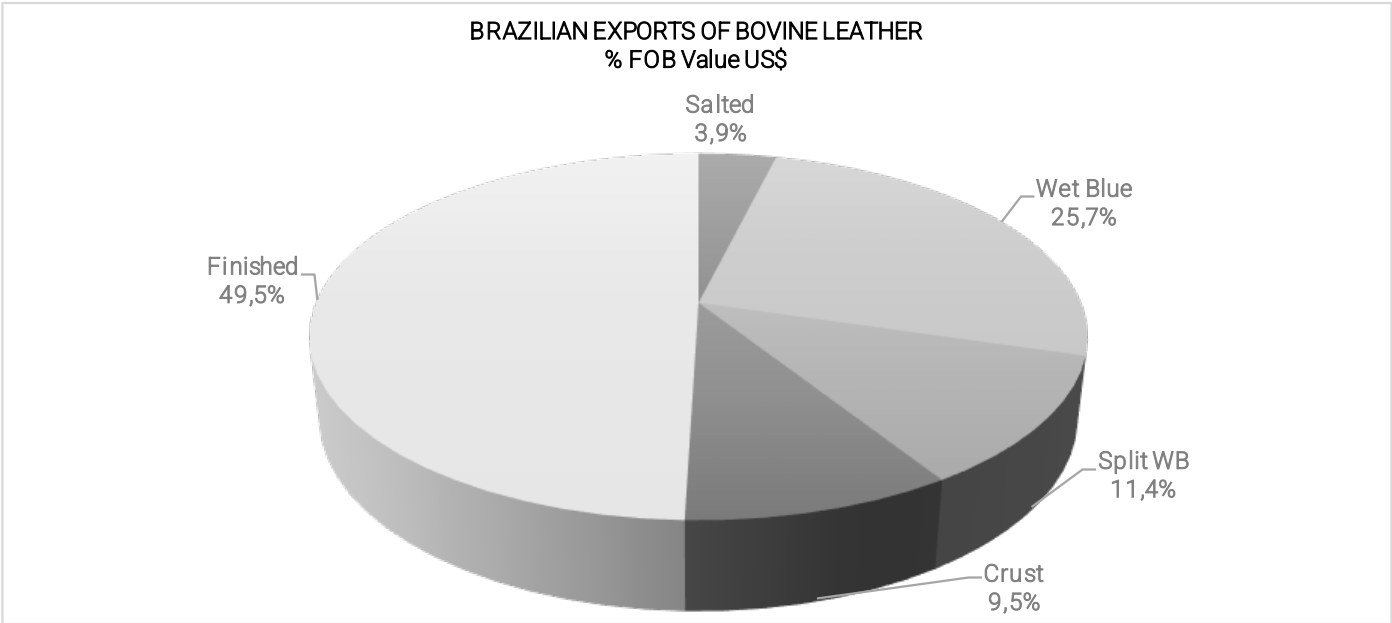
In this month, not even shipments to the United States were saved, with generalized drops in the three main destinations for national leather.

As the worsening of exports was more abrupt to China and Italy, the North Americans recorded a slight improvement in the share in the total value and area, even with the register of worsening in the annual comparative indexes.

Among the other TOP10 countries, the highlights continue to be leather exports to Spain (+64.8% in value and +64.3% in area) and to South Korea (+40.9% in value and +49.3% in area).

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Jul 2025	Jan-Jul 2024	Jan-Jul 2023	2025/2024	2025/2023	Jan-Jul 2025	Jan-Jul 2024	Jan-Jul 2023	2025/2024	2025/2023	Jan-Jul 2025	Jan-Jul 2024	Jan-Jul 2023	2025/2024	2025/2023
Salted	25.136.009	13.913.710	7.171.602	80,7%	250,5%	-	-	-	-	-	67.272.894	42.970.544	16.177.383	56,6%	315,8%
Wet Blue	167.945.221	223.433.060	154.154.844	-24,8%	8,9%	43.626.987	44.940.444	31.059.678	-2,9%	40,5%	175.932.604	182.006.002	123.543.407	-3,3%	42,4%
Split WB	74.378.296	83.269.920	60.965.656	-10,7%	22,0%	25.517.724	29.687.262	23.349.689	-14,0%	9,3%	72.870.307	83.077.047	66.190.141	-12,3%	10,1%
Crust	61.907.209	87.156.269	74.094.785	-29,0%	-16,4%	6.867.700	8.833.694	6.541.718	-22,3%	5,0%	6.464.188	8.556.580	6.497.342	-24,5%	-0,5%
Finished	323.269.374	346.870.729	341.573.179	-6,8%	-5,4%	30.616.597	30.570.925	28.505.748	0,1%	7,4%	27.182.343	26.775.889	24.998.746	1,5%	8,7%
Total	652.636.109	754.643.688	637.960.066	-13,5%	2,3%	106.629.008	114.032.325	89.456.833	-6,49%	19,2%	349.722.336	343.386.062	237.407.019	1,8%	47,3%

Source: MDIC/SECEX - Prepared by: CICB



■ ANALYSIS OF TYPES OF LEATHER

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

Wet blue, with a share of 25.7% (25.9%) in value and 53.8% (53.9%) in area, with decreases of 24.8% (-25.3%) in value and 2.9% (-3.0%) in area.

Split WB maintains 11.4% (11.4%) of share in value, with decreases of 10.7% (-7.5%) in value and 14.0% (-12.5%) in area.

Crust, with a share of 9.5% (9.4%) in value and 8.5% (8.3%) in area, shows reductions of 29.0% (-28.1%) in value and 22.3% (-21.7%) in area.

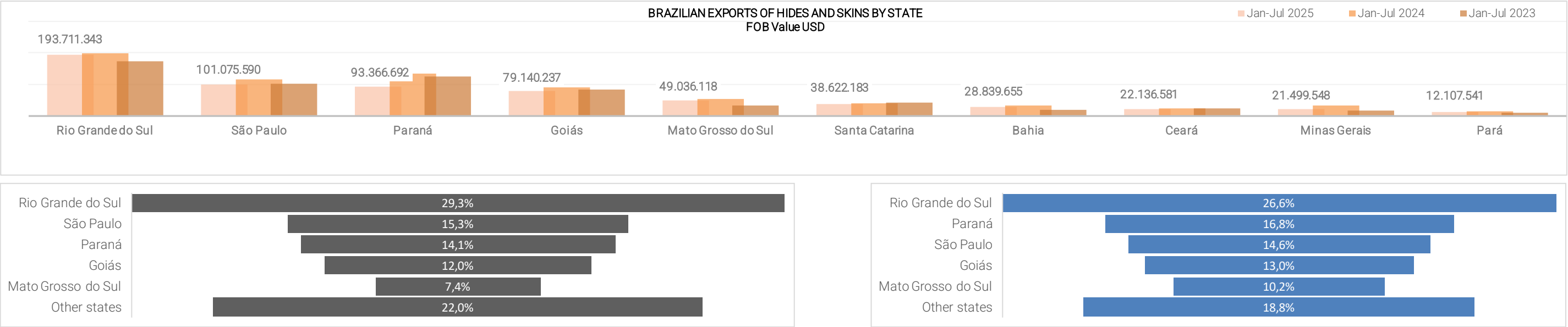
Finished leather maintains a share of 49.5% (49.5%) in value and 37.7% (37.7%) in area, has a decrease of 6.8% (-4.4%), but still an increase of 0.1% (+3.7%) in area.

Among the two types of leathers with the largest share in the total - wet blue and finished -, the biggest reduction in volume was in the finished leather, with a drop of 18.5% in area compared to the same month last year. Wet blue was practically stable in area, but with the average exported price still below US\$ 4.00 per sqm, it also caused the total value to drop by 20.0%.

After three consecutive months of declines in the volumes shipped of salted hides in the monthly comparison, we have another increase in July, exceeding 7 thousand tons.

		FOB VALUE (US\$)				Δ	AREA (sqm)				Δ	WEIGHT (KG)				Δ
		Jan-Jul 2025	Jan-Jul 2024	Jan-Jul 2023	2025	2025/2024	Jan-Jul 2025	Jan-Jul 2024	Jan-Jul 2023	2025	2025/2024	Jan-Jul 2025	Jan-Jul 2024	Jan-Jul 2023	2025	2025/2024
1	Rio Grande do Sul	193.711.343	199.057.982	173.437.419	29,3%	-2,7%	28.567.947	28.447.301	21.654.673	26,6%	0,4%	63.026.086	65.083.312	48.022.201	17,9%	-3,2%
2	São Paulo	101.075.590	115.950.170	103.082.820	15,3%	-12,8%	15.612.014	16.224.406	12.647.984	14,6%	-3,8%	41.232.046	47.898.449	27.284.027	11,7%	-13,9%
3	Paraná	93.366.692	134.130.186	124.873.951	14,1%	-30,4%	18.007.538	21.217.987	19.686.236	16,8%	-15,1%	61.076.011	65.728.649	54.449.965	17,4%	-7,1%
4	Goiás	79.140.237	91.800.878	84.205.103	12,0%	-13,8%	13.890.893	13.704.666	11.952.891	13,0%	1,4%	43.636.401	43.740.131	35.489.157	12,4%	-0,2%
5	Mato Grosso do Sul	49.036.118	54.922.133	33.075.325	7,4%	-10,7%	10.937.768	10.519.466	7.173.601	10,2%	4,0%	39.684.745	34.993.920	25.168.300	11,3%	13,4%
6	Santa Catarina	38.622.183	39.890.390	43.402.150	5,8%	-3,2%	5.573.497	5.406.844	4.973.345	5,2%	3,1%	14.368.330	13.546.931	9.746.264	4,1%	6,1%
7	Bahia	28.839.655	32.273.189	19.637.652	4,4%	-10,6%	3.660.195	4.199.583	3.016.651	3,4%	-12,8%	17.983.255	12.114.880	5.398.217	5,1%	48,4%
8	Ceará	22.136.581	24.289.153	24.873.280	3,3%	-8,9%	2.125.021	2.483.663	2.304.717	2,0%	-14,4%	3.859.192	3.870.323	3.413.455	1,1%	-0,3%
9	Minas Gerais	21.499.548	32.557.458	16.846.488	3,2%	-34,0%	3.289.769	6.055.195	3.149.507	3,1%	-45,7%	13.102.588	14.863.631	6.423.163	3,7%	-11,8%
10	Pará	12.107.541	16.088.716	9.681.687	1,8%	-24,7%	3.435.099	3.402.026	1.964.467	3,2%	1,0%	22.322.748	17.222.957	9.647.022	6,4%	29,6%
11	Mato Grosso	7.617.425	8.666.015	3.123.101	1,2%	-12,1%	1.672.860	1.619.929	667.068	1,6%	3,3%	7.090.041	6.438.792	2.249.346	2,0%	10,1%
12	Rio de Janeiro	3.307.103	2.513.946	2.839.906	0,5%	31,6%	39.350	40.156	75.146	0,04%	-2,0%	20.416	158.540	197.461	0,01%	-87,1%
13	Espírito Santo	2.883.125	67.871	10.550	0,4%	4147,9%	43	133	105	0,0%	-67,7%	6.807.767	192.961	65	1,9%	3428,1%
14	Piauí	2.668.987	1.294.635	1.068.344	0,4%	106,2%	142.931	67.208	55.215	0,1%	112,7%	1.260.107	38.441	32.626	0,4%	3178,0%
15	Rio Grande do Norte	2.461.468	2.110.991	2.075.337	0,4%	16,6%	0	0	0	0,0%	-	7.564.020	7.120.330	4.749.590	2,2%	6,2%
16	Pernambuco	1.277.720	2.398.275	1.747.958	0,2%	-46,7%	6.522	62.743	31.779	0,01%	-89,6%	4.010.499	6.620.215	4.091.355	1,1%	-39,4%
17	Rondônia	567.393	811.823	143.375	0,1%	-30,1%	150.659	218.858	37.068	0,1%	-31,2%	558.408	789.371	131.676	0,2%	-29,3%
18	Paraíba	457.722	0	52.191	0,1%	-	0	0	0	0,0%	-	1.498.530	0	106.000	0,4%	-
19	Alagoas	456.731	41.187	0	0,1%	1008,9%	0	0	0	0,0%	-	1.530.650	195.250	0	0,4%	683,9%
20	Maranhão	356.886	652.077	293.237	0,1%	-45,3%	104.426	112.804	63.087	0,1%	-7,4%	689.807	601.276	153.490	0,2%	14,7%
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	2.762.056	123.462	0,0%	-100,0%	0	550.646	24.727	0,0%	-100,0%	0	2.802.990	119.440	0,0%	-100,0%
23	Distrito Federal	0	241.870	385.410	0,0%	-100,0%	0	42.850	79.666	0,0%	-100,0%	0	213.783	421.045	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	572.305	0,0%	-	0	0	134.962	0,0%	-	0	0	651.630	0,0%	-
Total		661.590.048	762.539.641	645.551.051	100,0%	-13,2%	107.216.532	114.376.473	89.692.895	100,0%	-6,3%	351.321.647	344.314.641	237.945.495	100,0%	2,0%

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 presented the following highlights within the period:

Among the TOP10, now all states have monetary drops in year-to-date shipments. Rio Grande do Sul and Santa Catarina still register the best performance, remaining close to stability.

Considering the area shipped, there were increases in Mato Grosso do Sul (+4.0%), Santa Catarina (+3.1%), Goiás (+1.4%), Pará (+1.0%) and Rio Grande do Sul (+0.4%).

The ranking of the states ended the period with Rio Grande do Sul in first place in value, with a 29.3% share, followed by São Paulo (15.3%), Paraná (14.1%) and Goiás (12.0%).

In terms of shipped area, RS also leads with 26.6%, but Paraná is in second place, with 16.8% share, followed by São Paulo (14.6%) and Goiás (13.0%).

■ CLOSING REMARKS

Despite the growth compared to the previous month, July registered decreases in the annual comparison, which accentuated the retraction of exports accumulated in the year. There is now an increase only in the exported weight, with a positive change of 2.0%, while monetary values fell 13.2% and the exported area decreased by 6.3%.

When analyzing the three main markets, shipments to the United States were the only ones that had been maintaining consistent performance in recent months, signaling a possible recovery capable of neutralizing the deficit in exports to that destination and even allowing the projection of a positive balance at the end of the year.

However, the recent imposition of tariffs on a large part of the Brazilian export agenda – including hides and skins – with an absurd rate of 50% import tax, is already beginning to negatively impact the sector.

This month, there have already been reflections on shipments, with suspensions and even cancellations of orders by North American customers.

In addition to the measures imposed on Brazil, the impasse between the two largest economies in the world – China and the United States – still persists, paralyzing a significant portion of the business linked to the leather sector. The deadline for reaching an understanding now ends in August, but there is still no clarity on how the differences will be handled or whether it will be possible to sign a mutually advantageous agreement.

We remain confident that the Brazilian government, in conjunction with the leaders of the most affected sectors – with the constant action of the CIEB – will continue to be committed to seeking a negotiated solution with the United States that meets the interests of the country. -