

JUNE 2025

Brazilian exports of Hides and Skins

Brazilian leather

apexBrasil

MINISTRY OF
DEVELOPMENT,
INDUSTRY, TRADE
AND SERVICES

BRAZILIAN GOVERNMENT
BRASIL
UNITING AND REBUILDING

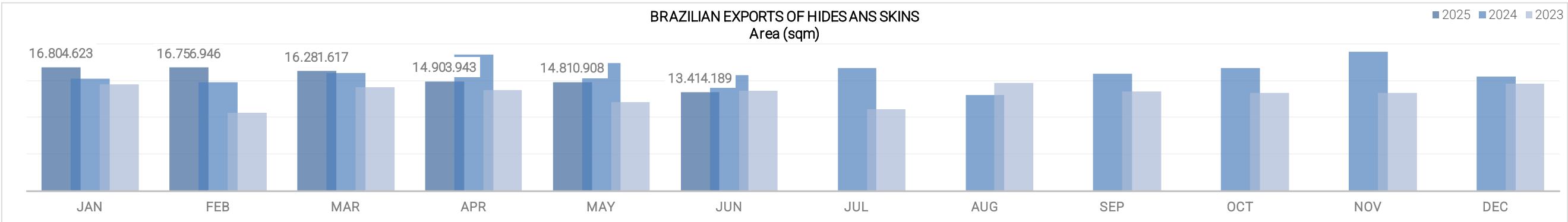
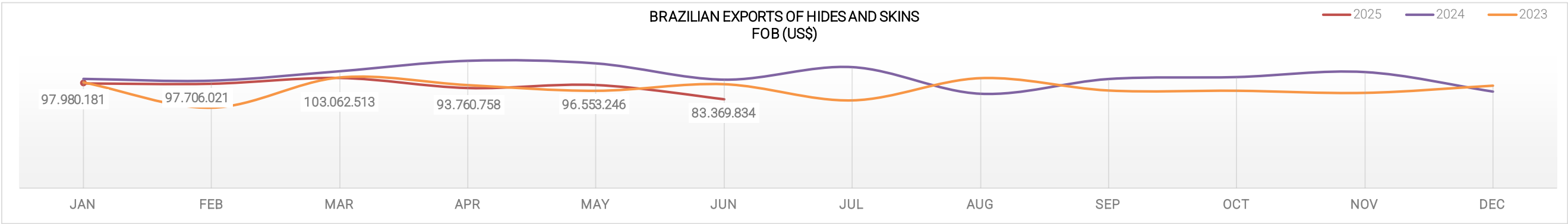
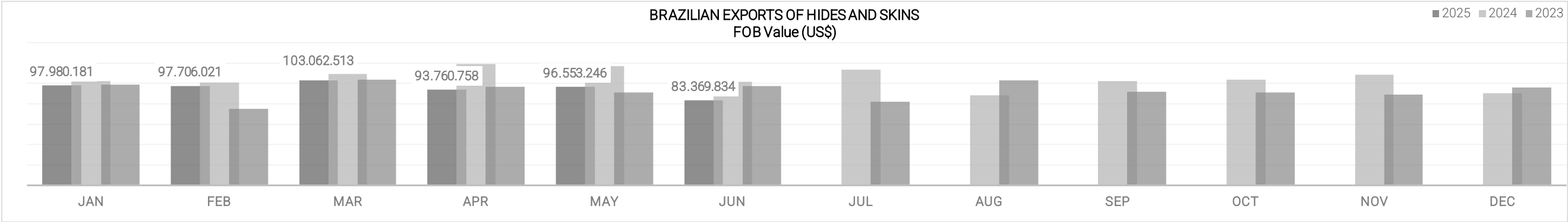
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MONTH	FOB VALUE (US\$)			Δ (%)			AREA (sqm)			Δ (%)			WEIGHT (Kg)			Δ (%)		
	2025	2024	2023	MONTH 2025	2025/2024	2025/2023	2025	2024	2023	MONTH 2025	2025/2024	2025/2023	2025	2024	2023	MONTH 2025	2025/2024	2025/2023
JAN	97.980.181	102.231.845	99.097.256	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	103.062.513	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	93.760.758	119.059.249	96.588.085	-9,0%	-21,2%	-2,9%	14.903.943	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	96.553.246	116.642.884	91.214.382	3,0%	-17,2%	5,9%	14.810.908	17.328.197	12.063.660	-0,6%	-14,5%	22,8%	44.953.114	52.802.187	31.339.687	-5,7%	-14,9%	43,4%
JUN	83.369.834	101.521.633	97.427.722	-13,7%	-17,9%	-14,4%	13.414.189	15.744.226	13.607.331	-9,4%	-14,8%	-1,4%	40.291.802	48.911.073	34.008.351	-10,4%	-17,6%	18,5%
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	572.432.553	1.256.116.597	1.116.751.780		-11,9%	1,6%	92.972.226	194.444.789	158.963.267		-4,9%	18,3%	306.023.986	597.696.216	430.611.610		2,9%	46,9%

Source: SECEX - Prepared by: CICB



■ ANALYSIS OF TOTAL EXPORTS

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Exports of hides and skins in June 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\$ 83.4 million.

This value represents reductions of 13.7% compared to the previous month, and 17.9% compared to the same period last year, when exports totaled US\$ 101.5 million.

In terms of volume, 13.4 million square meters and 40.3 thousand tons were exported, representing decreases of 14.8% and 17.6%, respectively, compared to June 2024. Compared to May 2025, there were also drops of 9.4% in the area and 10.4% in weight.

The first half of the year totaled US\$ 572.4 million, 11.9% below the same interval in 2024, also with a decrease of 4.9% in area, but an increase of 2.9% 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-Jun 2025	Jan-Jun 2024	Jan-Jun 2023	2025	2025/2024		Jan-Jun 2025	Jan-Jun 2024	Jan-Jun 2023	2025	2025/2024		Jan-Jun 2025	Jan-Jun 2024	Jan-Jun 2023	2025	2025/2024	
1 China + Hong Kong	178.198.505	209.087.126	173.224.821	31,1%	-14,8%		42.231.284	41.915.650	32.866.212	45,4%	0,8%		135.857.516	135.140.152	97.628.731	44,4%	0,5%	
China	169.691.717	194.412.347	155.846.056	29,6%	-12,7%		40.588.701	39.197.197	29.391.361	43,7%	3,6%		131.574.858	127.463.061	88.723.659	43,0%	3,2%	
2 United States	78.076.163	87.330.095	94.214.745	13,6%	-10,6%		6.423.278	6.648.515	7.065.404	6,9%	-3,4%		5.620.847	5.964.160	6.254.983	1,8%	-5,8%	
3 Italy	70.276.137	80.961.328	71.408.918	12,3%	-13,2%		13.311.490	13.717.461	12.379.644	14,3%	-3,0%		43.076.309	44.064.573	40.703.806	14,1%	-2,2%	
4 Vietnam	58.151.909	65.270.214	31.871.060	10,2%	-10,9%		11.374.854	13.270.965	6.374.659	12,2%	-14,3%		27.697.420	32.400.318	15.110.490	9,1%	-14,5%	
5 Mexico	29.232.699	37.975.010	24.504.974	5,1%	-23,0%		2.591.944	3.720.370	2.442.906	2,8%	-30,3%		3.274.087	5.201.729	3.501.344	1,1%	-37,1%	
6 Nigeria	16.432.403	3.041.260	1.105.012	2,9%	440,3%		0	0	0	0,0%	-		41.867.384	9.887.738	3.553.271	13,7%	323,4%	
7 Germany	13.411.218	18.125.122	16.742.284	2,3%	-26,0%		1.307.499	1.476.490	1.264.468	1,4%	-11,4%		1.559.237	1.245.461	1.077.084	0,5%	25,2%	
8 Thailand	11.790.034	21.751.599	21.297.594	2,1%	-45,8%		1.387.058	2.687.829	2.217.261	1,5%	-48,4%		1.732.112	6.983.254	4.144.501	0,6%	-75,2%	
9 South Korea	11.718.940	8.921.271	25.413.894	2,0%	31,4%		1.174.812	854.835	2.423.753	1,3%	37,4%		1.175.650	965.956	2.951.496	0,4%	21,7%	
Hong Kong	8.506.788	14.674.779	17.378.765	1,5%	-42,0%		1.642.583	2.718.453	3.474.851	1,8%	-39,6%		4.282.658	7.677.091	8.905.072	1,4%	-44,2%	
10 Spain	7.669.168	3.870.834	4.805.309	1,3%	98,1%		1.818.781	1.006.406	1.258.375	2,0%	80,7%		4.577.980	2.638.289	3.628.874	1,5%	73,5%	
11 Norway	7.313.810	5.561.190	3.972.452	1,3%	31,5%		496.548	380.139	271.323	0,5%	30,6%		372.958	268.284	192.033	0,1%	39,0%	
12 Slovakia	6.584.994	7.069.807	4.322.535	1,2%	-6,9%		487.693	470.192	266.629	0,5%	3,7%		434.731	445.833	268.135	0,1%	-2,5%	
13 Hungary	6.504.904	10.672.360	11.622.771	1,1%	-39,0%		644.347	923.439	921.973	0,7%	-30,2%		530.517	773.155	803.411	0,2%	-31,4%	
14 Tunisia	6.439.526	7.238.158	5.841.140	1,1%	-11,0%		403.781	464.547	369.035	0,4%	-13,1%		628.646	683.918	572.121	0,2%	-8,1%	
15 Uruguay	6.290.288	7.030.696	5.213.090	1,1%	-10,5%		728.383	923.167	626.887	0,8%	-21,1%		1.914.932	3.688.712	2.394.258	0,6%	-48,1%	
16 Taiwan	6.270.195	8.296.077	8.131.304	1,1%	-24,4%		1.440.211	1.626.493	1.909.877	1,5%	-11,5%		4.413.743	5.370.677	5.711.054	1,4%	-17,8%	
17 Argentina	5.522.068	2.995.244	6.123.551	1,0%	84,4%		518.338	202.866	425.670	0,6%	155,5%		732.531	247.442	514.432	0,2%	196,0%	
18 India	5.442.403	4.737.793	3.855.464	1,0%	14,9%		1.749.804	1.261.368	783.037	1,9%	38,7%		4.245.264	3.601.248	2.517.812	1,4%	17,9%	
19 Bangladesh	4.042.275	3.787.667	919.896	0,7%	6,7%		337.209	279.096	69.157	0,4%	20,8%		492.351	480.543	113.019	0,2%	2,5%	
20 Netherlands	3.878.750	4.257.627	5.475.837	0,7%	-8,9%		426.557	424.442	554.213	0,5%	0,5%		421.274	418.502	539.257	0,1%	0,7%	
21 Cambodia	3.569.159	3.966.346	1.832.717	0,6%	-10,0%		240.856	91.032	151.393	0,3%	164,6%		6.039.737	7.361.022	1.059.746	2,0%	-17,9%	
22 Portugal	3.044.302	3.109.572	2.621.378	0,5%	-2,1%		250.680	263.494	269.049	0,3%	-4,9%		415.789	409.871	719.028	0,1%	1,4%	
23 Poland	2.840.447	3.304.858	3.248.141	0,5%	-14,1%		265.661	297.878	299.817	0,3%	-10,8%		221.724	253.243	241.761	0,1%	-12,4%	
24 Indonesia	2.731.199	6.270.076	2.616.139	0,5%	-56,4%		507.207	993.520	330.025	0,5%	-48,9%		1.133.043	1.587.527	249.140	0,4%	-28,6%	
25 Colombia	2.300.400	2.238.406	702.143	0,4%	2,8%		434.684	379.970	79.680	0,5%	14,4%		1.416.592	1.104.177	222.272	0,5%	28,3%	
26 Turkey	2.236.822	4.022.490	2.924.601	0,4%	-44,4%		10.054	24.595	62.106	0,0%	-59,1%		8.684.989	12.821.754	6.226.777	2,8%	-32,3%	
27 Dominican Republic	2.019.581	1.457.626	1.008.673	0,4%	38,6%		306.306	214.400	131.294	0,3%	42,9%		1.119.343	796.922	369.413	0,4%	40,5%	
28 Canada	1.927.379	2.339.905	2.208.844	0,3%	-17,6%		122.708	146.194	134.325	0,1%	-16,1%		112.732	173.644	119.962	0,04%	-35,1%	
29 South Africa	1.922.469	1.485.989	2.222.378	0,3%	29,4%		246.911	174.488	237.370	0,3%	41,5%		414.022	209.552	356.510	0,1%	97,6%	
30 France	1.895.786	1.912.917	2.547.294	0,3%	-0,9%		88.264	84.141	111.090	0,1%	4,9%		134.437	127.537	162.183	0,04%	5,4%	
Others (2025: +41 countries)	14.698.620	21.326.976	21.383.461	2,6%	-31,1%		1.645.024	2.791.364	2.288.675	1,8%	-41,1%		5.706.089	12.214.968	6.484.570	1,9%	-53,3%	
Total	572.432.553	649.415.639	563.382.420		-11,9%		92.972.226	133.691.265	78.585.307		-4,9%		306.023.986	297.530.161	208.391.474		2,9%	

Source: MDIC/SECEX - Prepared by: CICB

■ ANALYSIS OF DESTINATIONS

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

China (excluding Hong Kong) has a share of 29.6% (previously 29.9%) in value and 43.7% (44.1%) in area, with a decrease of 12.7% (-11.1%) in value, but still an increase of 3.6% (+6.1%) in area.

The United States is in second place in the ranking, with 13.6% (13.7%) of share in value, maintaining 6.9% (6.9%) in area, with a decrease of 10.6% (-11.6%) in value and 3.4% (-3.9%) in area.

Italy in third, with a share of 12.3% (12.8%) in value and 14.3% (14.8%) in area, has decreases of 13.2% (-5.2%) in value and 3.0% (+5.5%) in area.

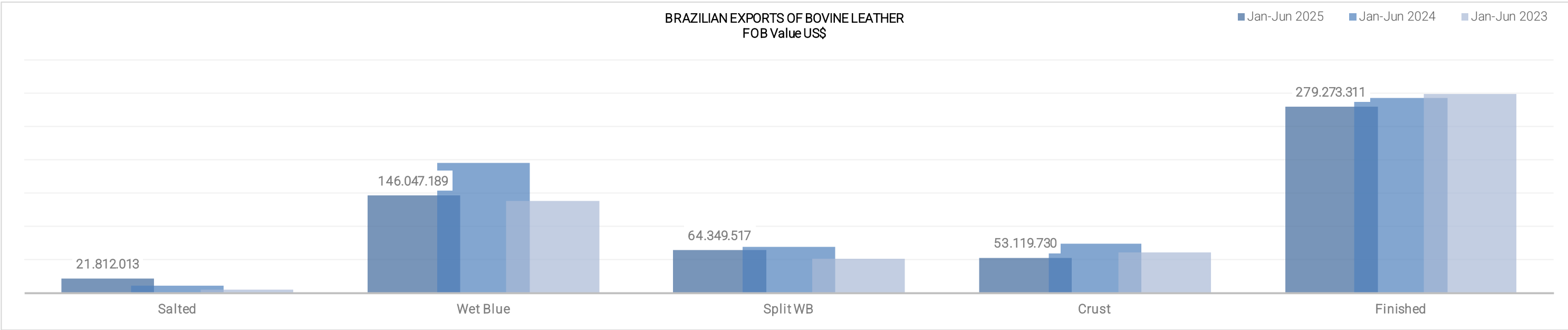
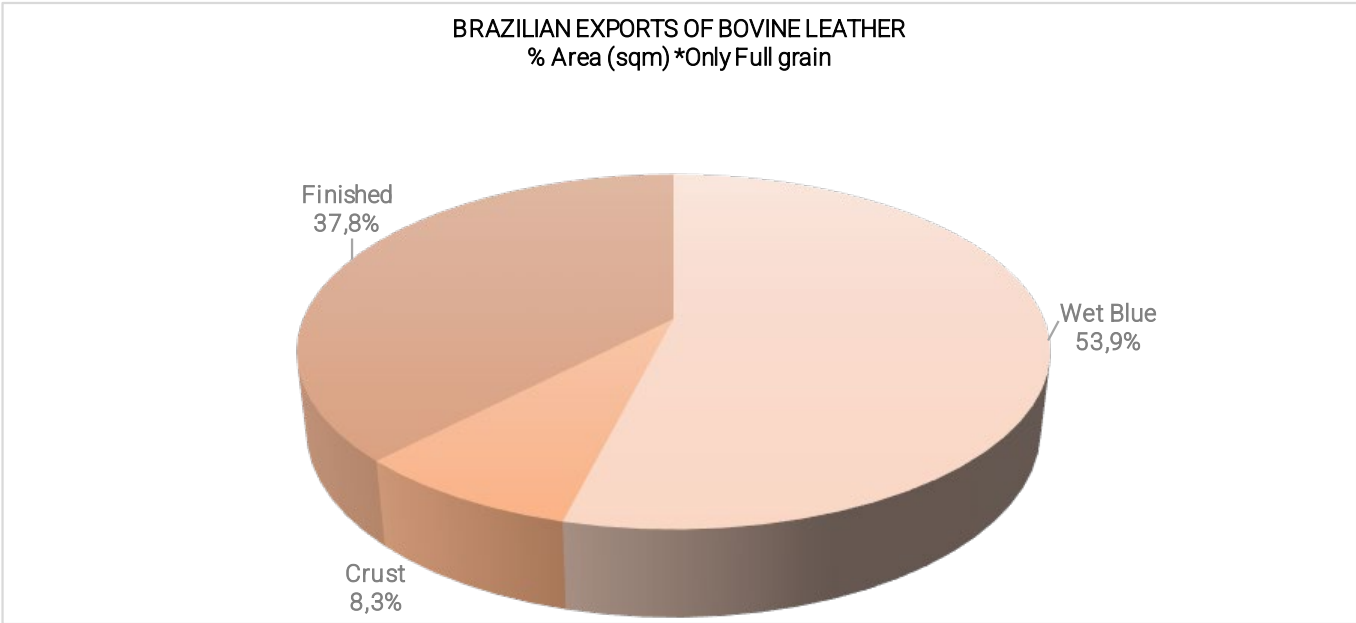
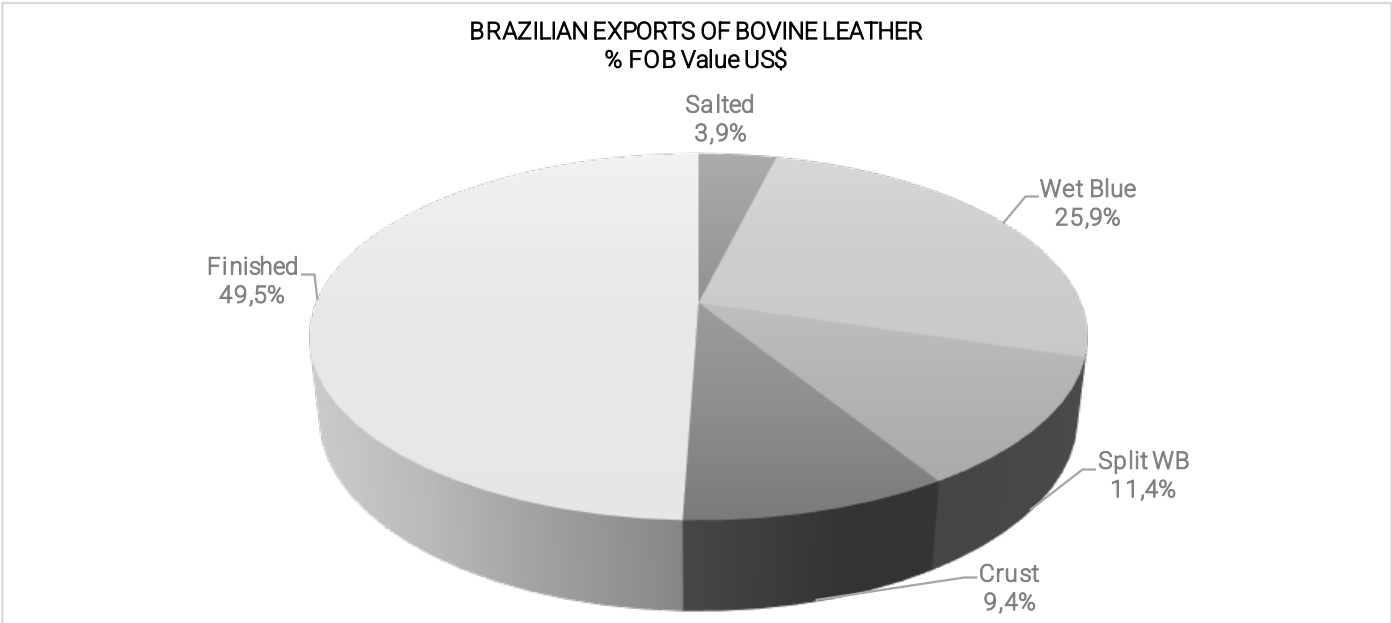
Once again, we have a month with improvements only in the indexes of shipments to the United States, while China and Italy have worsened in participation and in annual comparative indexes.

These declines were greater in Italy, materializing the difficulties in business registered since the beginning of the year on the European continent.

Among the other TOP10 countries, the highlights continue to be leather exports to South Korea (+31.4% in value and +37.4% in area) and to Spain, now in 10th place, with significant increases of +98.1% in value and +80.7% in area.

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Jun 2025	Jan-Jun 2024	Jan-Jun 2023	2025/2024	2025/2023	Jan-Jun 2025	Jan-Jun 2024	Jan-Jun 2023	2025/2024	2025/2023	Jan-Jun 2025	Jan-Jun 2024	Jan-Jun 2023	2025/2024	2025/2023
Salted	21.812.013	11.912.405	5.654.021	83,1%	285,8%	-	-	-	-	-	59.433.201	36.937.524	12.684.505	60,9%	368,5%
Wet Blue	146.047.189	195.443.685	138.389.967	-25,3%	5,5%	38.029.613	39.195.690	27.837.655	-3,0%	36,6%	153.396.848	160.170.177	110.814.931	-4,2%	38,4%
Split WB	64.349.517	69.598.522	52.151.030	-7,5%	23,4%	21.981.905	25.131.573	20.138.614	-12,5%	9,2%	62.881.294	70.006.790	57.040.634	-10,2%	10,2%
Crust	53.119.730	73.906.583	61.438.723	-28,1%	-13,5%	5.838.152	7.454.576	5.412.258	-21,7%	7,9%	5.510.261	7.175.279	5.411.681	-23,2%	1,8%
Finished	279.273.311	292.124.216	299.063.955	-4,4%	-6,6%	26.625.585	25.668.001	24.997.635	3,7%	6,5%	23.637.830	22.467.660	21.929.655	5,2%	7,8%
Total	564.601.760	642.985.411	556.697.696	-12,2%	1,4%	92.475.255	97.449.840	78.386.162	-5,10%	18,0%	304.859.434	296.757.430	207.881.406	2,7%	46,7%

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 half of the year, compared to the same interval of the previous year:

Wet blue, with a share of 25.9% (26.1%) in value and 53.9% (54.3%) in area, with decreases of 25.3% (-22.3%) in value and 3.0% (+0.5%) in area.

Split WB maintains 11.4% (11.4%) of share in value, with decreases of 7.5% (-3.3%) in value and 12.5% (-9.8%) in area.

Crust, with a share of 9.4% (9.2%) in value and 8.3% (8.0%) in area, shows reductions of 28.1% (-31.1%) in value and 21.7% (-24.8%) in area.

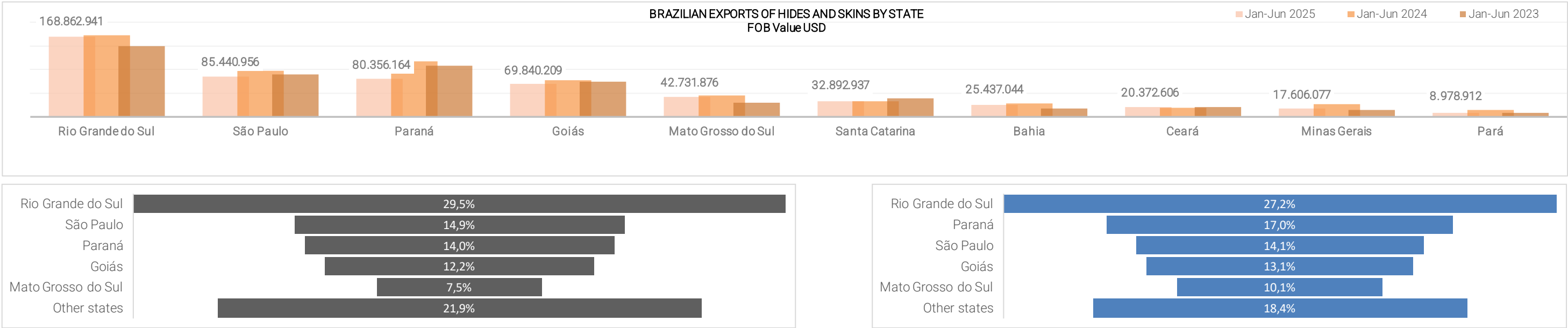
Finished, with a share of 49.5% (49.4%) in value and 37.8% (37.7%) in area, it has a decrease of 4.4% (-4.5%), but an increase of 3.7% (+4.1%) in area.

Wet blue leather continues to worsen the indexes, while there was a slight improvement in crust, although it still registered declines in the year in values and volumes.

Shipments of salted hides in the semester registered increases of 83.1% in value and 60.9% in weight but had in June the lowest value and the lowest weight shipped in the period.

		FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
		Jan-Jun 2025	Jan-Jun 2024	Jan-Jun 2023	2025	2025/2024	Jan-Jun 2025	Jan-Jun 2024	Jan-Jun 2023	2025	2025/2024	Jan-Jun 2025	Jan-Jun 2024	Jan-Jun 2023	2025	2025/2024
1	Rio Grande do Sul	168.862.941	172.449.488	148.813.427	29,5%	-2,1%	25.278.723	24.976.135	18.855.925	27,2%	1,2%	56.286.306	57.347.370	42.101.892	18,4%	-1,9%
2	São Paulo	85.440.956	97.780.714	89.899.144	14,9%	-12,6%	13.133.711	13.627.223	11.128.216	14,1%	-3,6%	35.369.749	41.081.242	23.780.663	11,6%	-13,9%
3	Paraná	80.356.164	116.996.210	108.705.368	14,0%	-31,3%	15.832.408	18.656.169	16.817.824	17,0%	-15,1%	54.277.221	58.890.375	45.754.284	17,7%	-7,8%
4	Goiás	69.840.209	77.482.616	74.443.995	12,2%	-9,9%	12.194.158	11.477.950	10.699.348	13,1%	6,2%	38.743.110	37.475.942	32.634.195	12,7%	3,4%
5	Mato Grosso do Sul	42.731.876	45.159.821	30.187.227	7,5%	-5,4%	9.399.220	8.687.188	6.548.176	10,1%	8,2%	33.826.180	29.317.240	23.389.644	11,1%	15,4%
6	Santa Catarina	32.892.937	32.786.401	38.677.938	5,7%	0,3%	4.818.491	4.413.523	4.449.938	5,2%	9,2%	12.559.259	11.461.608	8.692.335	4,1%	9,6%
7	Bahia	25.437.044	28.868.225	17.090.371	4,4%	-11,9%	3.064.541	3.869.517	2.617.085	3,3%	-20,8%	14.966.155	10.520.746	4.693.147	4,9%	42,3%
8	Ceará	20.372.606	19.534.603	21.405.571	3,6%	4,3%	1.983.784	1.923.897	1.898.652	2,1%	3,1%	3.378.598	2.932.957	2.712.943	1,1%	15,2%
9	Minas Gerais	17.606.077	26.678.699	15.300.848	3,1%	-34,0%	2.714.468	4.957.026	2.856.761	2,9%	-45,2%	10.968.813	12.333.023	5.896.636	3,6%	-11,1%
10	Pará	8.978.912	14.450.417	8.154.861	1,6%	-37,9%	2.577.775	3.035.842	1.658.623	2,8%	-15,1%	18.196.224	15.437.121	8.125.320	5,9%	17,9%
11	Mato Grosso	7.002.388	6.735.875	2.816.884	1,2%	4,0%	1.542.408	1.242.034	599.697	1,7%	24,2%	6.551.016	5.006.556	2.019.330	2,1%	30,8%
12	Rio de Janeiro	2.918.374	2.162.158	2.452.903	0,5%	35,0%	34.220	36.070	70.766	0,04%	-5,1%	17.558	156.294	195.381	0,01%	-88,8%
13	Espírito Santo	2.664.327	59.589	10.550	0,5%	4371,2%	43	44	105	0,0%	-2,3%	6.254.142	192.915	65	2,0%	3141,9%
14	Piauí	2.466.933	933.419	924.778	0,4%	164,3%	137.682	50.597	47.969	0,1%	172,1%	1.006.100	28.704	28.543	0,3%	3405,1%
15	Rio Grande do Norte	2.191.035	1.916.379	1.652.921	0,4%	14,3%	0	0	0	0,0%	-	6.668.020	6.420.330	3.818.990	2,2%	3,9%
16	Pernambuco	1.169.748	1.922.033	1.453.925	0,2%	-39,1%	6.522	51.052	31.779	0,01%	-87,2%	3.680.179	5.512.504	3.145.035	1,2%	-33,2%
17	Rondônia	567.393	681.696	143.375	0,1%	-16,8%	150.659	185.075	37.068	0,2%	-18,6%	558.408	671.942	131.676	0,2%	-16,9%
18	Maranhão	328.148	514.517	273.655	0,1%	-36,2%	103.413	81.856	60.060	0,1%	26,3%	605.088	456.890	133.130	0,2%	32,4%
19	Alagoas	303.592	0	0	0,1%	-	0	0	0	0,0%	-	1.084.000	0	0	0,4%	-
20	Paraíba	300.893	0	52.191	0,1%	-	0	0	0	0,0%	-	1.027.860	0	106.000	0,3%	-
21	Amazonas	0	2.059.721	37.238	0,0%	-100,0%	0	401.289	8.289	0,0%	-100,0%	0	2.072.610	38.700	0,0%	-100,0%
22	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%
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		572.432.553	649.415.639	563.382.420	100,0%	-11,9%	92.972.226	97.715.346	78.585.307	100,0%	-4,9%	306.023.986	297.530.161	208.391.474	100,0%	2,9%

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



■ ANALYSIS OF STATES

At the end of the semester, exports from Brazilian states presented the following highlights:

Among the TOP10, we now have two states with monetary increases in the year: Ceará, with +4.3% and Santa Catarina, with +0.3%.

Considering the area shipped, we have increases in Santa Catarina (+9.2%), Mato Grosso do Sul (+8.2%), Goiás (+6.2%), Ceará (+3.1%) and Rio Grande do Sul (+1.2%).

The state of Mato Grosso, in 11th position in the ranking, has significant growth in area, with +24.2%.

The ranking of the states ended the semester with Rio Grande do Sul in first place in the three indexes: 29.5% share in value, 27.2% in area and 18.4% in weight.

The state of São Paulo was second in value, with a 14.9% share, followed by Paraná (14.0%) and Goiás (12.2%). In terms of area, Paraná was in second place, with 17.0%, followed by São Paulo (14.1%) and Goiás (13.1%).

■ CLOSING REMARKS

Brazilian exports of hides and skins ended the first half of 2025 with a growth of 2.9% in volume but showed decreases both in values (-11.9%) and in area (-4.9%), compared to the same period in 2024.

When we analyze each quarter of 2025 compared to the previous year's data, we observe that, in the first quarter, there was an increase in exported volumes, but with a reduction in average prices, which resulted in a drop in the total value of exports. In the second quarter, exported volumes decreased both in area and weight during the three months, which, despite a slight improvement in average prices, contributed to a worsening of monetary losses.

When we examine this year's export data, released by the main countries in the sector, it is possible to see the strong impact of global uncertainties and tensions on international trade.

The temporary agreement signed between the world's two largest economies is about to expire, and uncertainty is growing about the next steps in the trade war. There is, so far, no guarantee of a satisfactory new agreement between the United States and China.

While these issues will not have a direct influence on leather supply and demand, the weight of decisions and delays in negotiations will certainly have a reflection on business and exports in the second half of the year.