MAY 2025

Brazilian exports
of Hides and Skins

Brazilian leather

apexBrasil

MINISTRY OF
DEVELOPMENT,
INDUSTRY, TRADE
AND SERVICES

BRAZILIAN GOVERNMENT
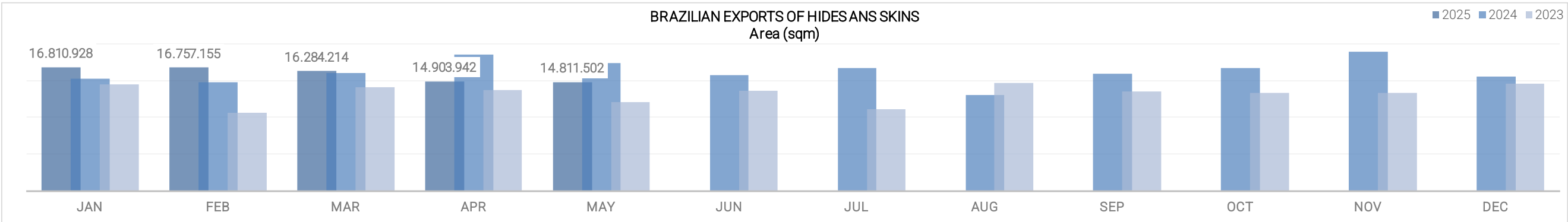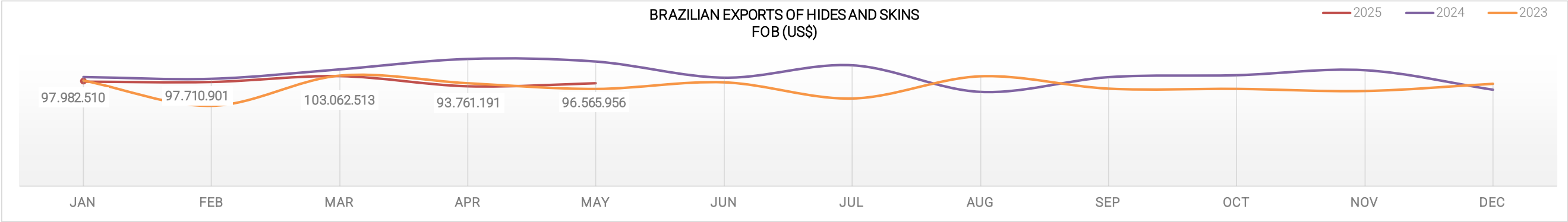BRASIL
UNITING AND REBUILDING

CICB

SUMMARY	PAGE

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	97.982.510	102.231.845	99.097.256	8,3%	-4,2%	-1,1%	16.810.928	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	97.710.901	100.594.249	75.269.723	-0,3%	-2,9%	29,8%	16.757.155	14.792.606	10.666.731	-0,3%	13,3%	57,1%	57.508.114	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%	16.284.214	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	93.761.191	119.059.249	96.588.085	-9,0%	-21,2%	-2,9%	14.903.942	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	96.565.956	116.642.884	91.214.382	3,0%	-17,2%	5,9%	14.811.502	17.328.197	12.063.660	-0,6%	-14,5%	22,8%	44.953.695	52.802.187	31.339.687	-5,7%	-14,9%	43,4%
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	489.083.071	1.256.225.656	1.116.751.780		-10,7%	5,0%	79.567.741	194.452.158	158.963.267		-2,9%	22,5%	265.733.336	597.701.152	430.611.610		6,9%	52,4%

Source: SECEX - Prepared by: CICB

BRAZILIAN EXPORTS OF HIDES AND SKINS
FOB Value (US$)

BRAZILIAN EXPORTS OF HIDES AND SKINS
FOB (US$)

BRAZILIAN EXPORTS OF HIDES ANS SKINS
Area (sqm)

- ## ANALYSIS OF TOTAL EXPORTS

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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 the CICB, reached US$ 96.6 million in May 2025.

This value represents an increase of 3.0% compared to the previous month, but a decrease of 17.2% compared to the same period last year, when exports totaled US$ 116.6 million.

Considering volume, 14.8 million square meters and 45.0 thousand tons were exported, which represent reductions of 14.5% and 14.9%, respectively, compared to May 2024. Compared to April this year, there were decreases of 0.6% in the area and 5.7% in weight.

The five-month interval of the year totaled US$ 489.1 million, 10.7% below the same period in 2024, also with a decrease of 2.9% in area, but an increase of 6.9% in weight.

#	COUNTRIES	FOB VALUE (US$)			Share 2025	Δ 2025/2024	AREA (sqm)			Share 2025	Δ 2025/2024	WEIGHT (KG)			Share 2025	Δ 2025/2024
		Jan-May 2025	Jan-May 2024	Jan-May 2023			Jan-May 2025	Jan-May 2024	Jan-May 2023			Jan-May 2025	Jan-May 2024	Jan-May 2023		
1	China + Hong Kong	153.643.448	177.681.375	145.838.312	31,4%	-13,5%	36.482.253	35.536.134	27.605.804	45,9%	2,7%	118.152.098	114.157.195	84.080.352	44,5%	3,5%
	China	146.239.355	164.514.609	132.069.528	29,9%	-11,1%	35.104.827	33.073.817	24.822.109	44,1%	6,1%	114.564.797	107.185.815	76.780.290	43,1%	6,9%
2	United States	67.070.331	75.852.958	77.950.455	13,7%	-11,6%	5.496.688	5.717.819	5.913.216	6,9%	-3,9%	4.792.582	4.962.721	5.248.930	1,8%	-3,4%
3	Italy	62.421.489	65.841.867	59.211.237	12,8%	-5,2%	11.783.478	11.168.837	10.358.955	14,8%	5,5%	38.481.015	36.933.611	34.566.969	14,5%	4,2%
4	Vietnam	48.991.130	54.349.811	23.632.862	10,0%	-9,9%	9.551.778	10.973.047	4.796.125	12,0%	-13,0%	23.649.020	26.643.430	11.420.236	8,9%	-11,2%
5	Mexico	24.961.699	31.613.092	20.859.086	5,1%	-21,0%	2.179.405	3.226.031	2.025.119	2,7%	-32,4%	2.720.798	4.650.062	2.800.895	1,0%	-41,5%
6	Nigeria	14.648.659	2.156.340	793.811	3,0%	579,3%	0	0	0	0,0%	-	37.909.038	7.506.325	2.614.596	14,3%	405,0%
7	Germany	11.868.958	16.373.048	13.800.454	2,4%	-27,5%	1.149.505	1.332.537	1.050.308	1,4%	-13,7%	1.264.005	1.125.126	896.586	0,5%	12,3%
8	Thailand	10.345.308	17.751.860	17.511.692	2,1%	-41,7%	1.228.248	2.091.614	1.854.987	1,5%	-41,3%	1.528.122	4.988.586	3.643.276	0,6%	-69,4%
9	South Korea	8.779.204	7.498.288	20.849.488	1,8%	17,1%	887.238	727.644	2.003.984	1,1%	21,9%	898.744	857.922	2.528.925	0,3%	4,8%
	Hong Kong	7.404.093	13.166.766	13.768.784	1,5%	-43,8%	1.377.426	2.462.317	2.783.695	1,7%	-44,1%	3.587.301	6.971.380	7.300.062	1,3%	-48,5%
10	Norway	6.260.930	5.374.905	3.919.570	1,3%	16,5%	424.627	366.511	267.189	0,5%	15,9%	319.056	259.103	189.277	0,1%	23,1%
11	Spain	6.251.960	3.325.257	3.860.643	1,3%	88,0%	1.488.505	901.688	1.050.775	1,9%	65,1%	3.694.523	2.353.518	3.105.036	1,4%	57,0%
12	Slovakia	5.779.356	6.185.978	3.560.877	1,2%	-6,6%	429.738	408.690	219.145	0,5%	5,2%	380.780	390.468	221.692	0,1%	-2,5%
13	Hungary	5.704.385	9.454.546	9.780.872	1,2%	-39,7%	565.984	813.736	770.427	0,7%	-30,4%	464.291	682.673	673.787	0,2%	-32,0%
14	Tunisia	5.252.583	5.465.474	4.569.320	1,1%	-3,9%	331.071	356.287	293.206	0,4%	-7,1%	518.124	516.227	445.200	0,2%	0,4%
15	Taiwan	5.226.060	7.135.316	6.525.616	1,1%	-26,8%	1.192.639	1.374.455	1.483.915	1,5%	-13,2%	3.754.521	4.460.756	4.436.737	1,4%	-15,8%
16	Uruguay	4.846.015	4.968.837	4.708.861	1,0%	-2,5%	558.858	600.143	559.725	0,7%	-6,9%	1.519.595	2.279.081	2.109.742	0,6%	-33,3%
17	India	4.618.789	4.068.133	3.112.562	0,9%	13,5%	1.487.300	1.109.789	584.446	1,9%	34,0%	3.670.881	3.145.408	1.801.976	1,4%	16,7%
18	Argentina	4.053.227	2.487.403	5.334.545	0,8%	63,0%	366.308	153.840	373.168	0,5%	138,1%	485.704	191.310	422.793	0,2%	153,9%
19	Netherlands	3.405.289	3.689.396	4.110.688	0,7%	-7,7%	370.325	366.660	422.781	0,5%	1,0%	365.090	362.585	408.906	0,1%	0,7%
20	Bangladesh	3.296.903	3.568.128	885.143	0,7%	-7,6%	287.381	246.317	66.889	0,4%	16,7%	424.128	324.300	110.062	0,2%	30,8%
21	Cambodia	2.943.843	3.466.180	1.381.227	0,6%	-15,1%	146.236	84.640	122.336	0,2%	72,8%	5.341.447	6.397.571	742.934	2,0%	-16,5%
22	Poland	2.228.532	2.702.335	2.716.296	0,5%	-17,5%	209.688	243.032	251.151	0,3%	-13,7%	175.905	205.659	202.266	0,1%	-14,5%
23	Colombia	2.193.082	1.724.804	496.179	0,4%	27,1%	418.121	286.648	45.633	0,5%	45,9%	1.349.854	864.758	138.814	0,5%	56,1%
24	Portugal	2.107.111	2.576.812	2.132.499	0,4%	-18,2%	176.416	210.989	207.235	0,2%	-16,4%	341.705	319.395	542.928	0,1%	7,0%
25	Indonesia	1.820.410	4.814.064	2.303.956	0,4%	-62,2%	341.411	746.211	287.223	0,4%	-54,2%	861.199	1.047.907	216.271	0,3%	-17,8%
26	Dominican Republic	1.790.548	1.355.722	732.265	0,4%	32,1%	259.152	201.177	99.944	0,3%	28,8%	932.156	750.779	305.284	0,4%	24,2%
27	Turkey	1.619.726	3.476.177	2.212.065	0,3%	-53,4%	10.054	10.951	62.106	0,0%	-8,2%	6.411.824	11.180.599	4.582.498	2,4%	-42,7%
28	France	1.584.942	1.575.015	1.945.251	0,3%	0,6%	74.404	69.023	85.986	0,1%	7,8%	112.258	102.825	124.559	0,0%	9,2%
29	South Africa	1.544.912	1.322.487	1.901.698	0,3%	16,8%	200.739	154.700	197.381	0,3%	29,8%	321.868	190.169	318.697	0,1%	69,3%
30	Canada	1.496.700	1.845.096	1.682.285	0,3%	-18,9%	95.018	117.837	100.654	0,1%	-19,4%	86.757	146.972	93.208	0,0%	-41,0%
	Others (2025: +40 countries)	12.327.542	18.193.302	17.634.883	2,5%	-32,2%	1.375.173	2.374.133	1.818.163	1,7%	-42,1%	4.806.248	10.622.047	5.389.691	1,8%	-54,8%
	Total	489.083.071	547.894.006	465.954.698		-10,7%	79.567.741	81.971.120	64.977.976		-2,9%	265.733.336	248.619.088	174.383.123		6,9%

Source: MDIC/SECEX - Prepared by: CICB

▪ ANALYSIS OF DESTINATIONS

The three main destinations for Brazilian leather presented the following data in the year:

China (excluding Hong Kong) has a share of 29.9% (previously 31.1%) in value and 44.1% (45.5%) in area, with a decrease of 11.1% (-5.8%) in value and an increase of 6.1% (+12.8%) in area.

The United States is in second place in the ranking, with 13.7% (13.1%) of share in value and 6.9% (6.4%) in area, with a decrease of 11.6% (-13.9%) in value and 3.9% (-8.9%) in area.

Italy in third, with a share of 12.8% (13.0%) in value and 14.8% (15.2%) in area, now has a drop of 5.2% (+2.9%) in value, but an increase of 5.5% (+16.4%) in area.
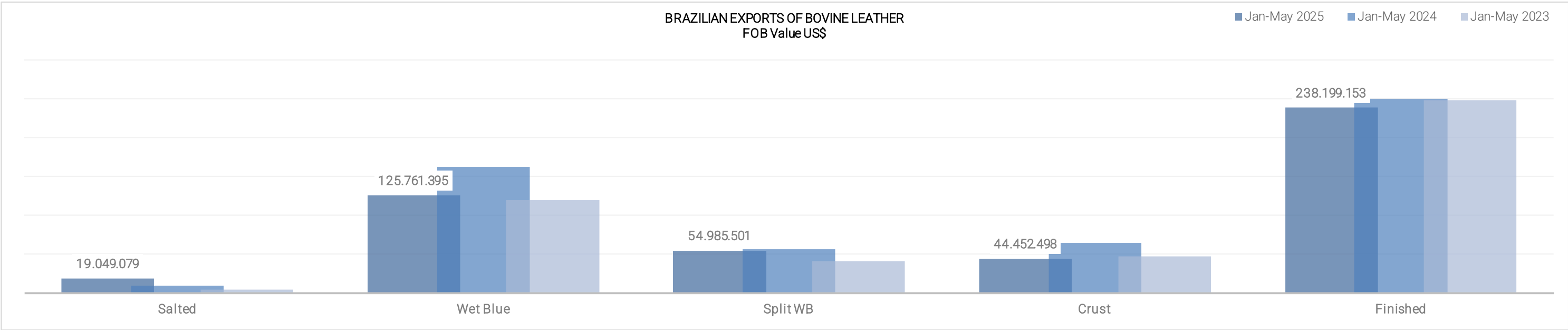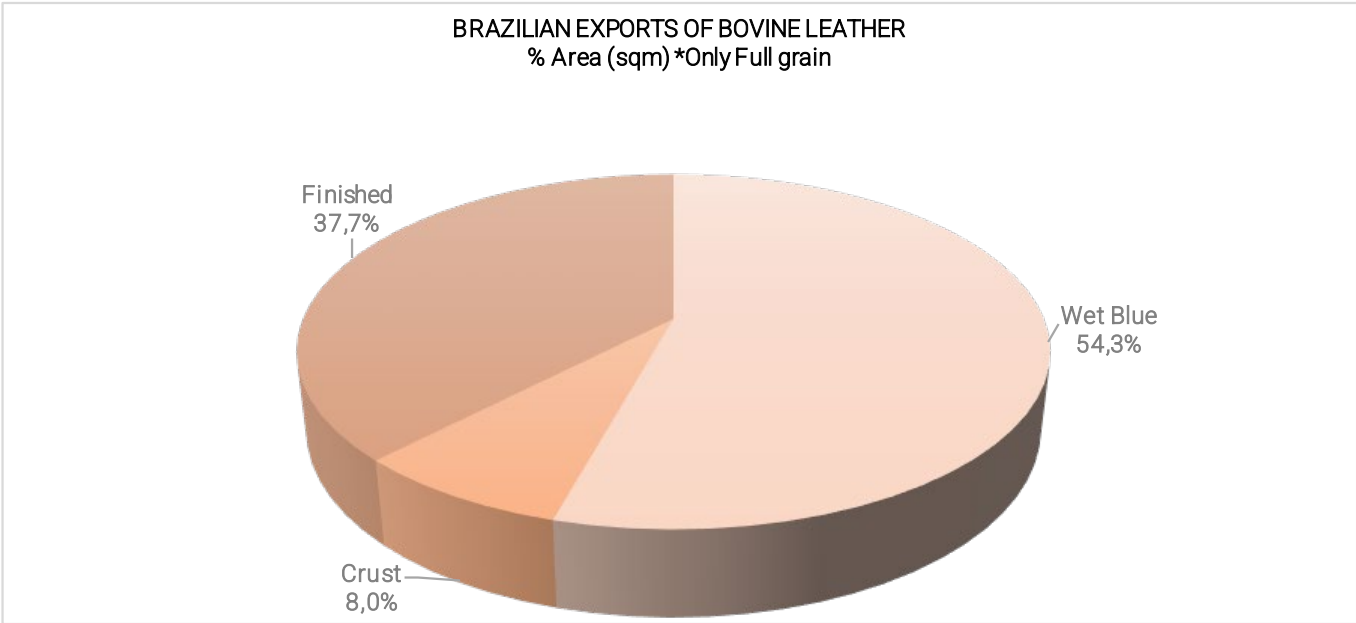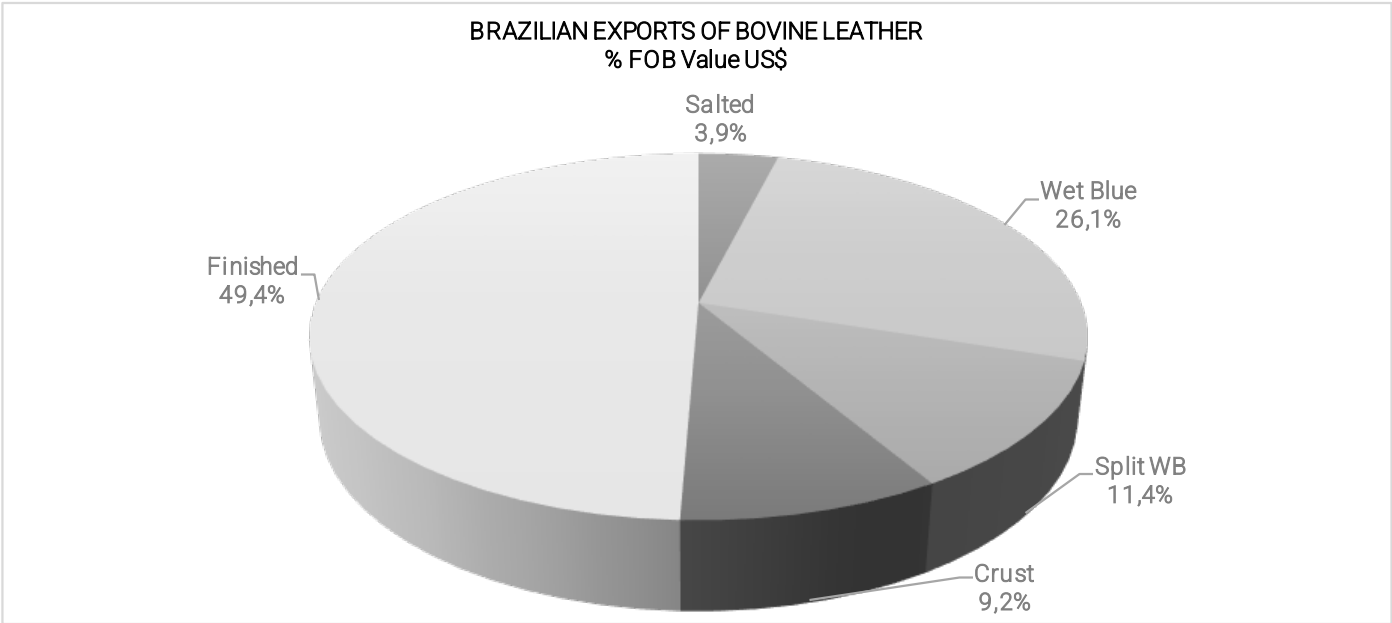
For the second consecutive month, there was an improvement only in the indicators of exports to the United States. China and Italy again registered difficulties, with worsening in participation and annual comparative indexes.

However, for China and Italy we still have growth in shipments in volumes. The US, on the other hand, continues to show a drop in values and volumes.

Among the other TOP10 countries, there is growth in leather exports to South Korea (+17.1% in value and +21.9% in area) and Norway (+16.5% in value and +15.9% in area). Spain, in 11th place, also has a significant increase of +88.0% in value and +65.1% in area.

TYPE OF LEATHER	FOB VALUE (US$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-May 2025	Jan-May 2024	Jan-May 2023	2025/2024	2025/2023	Jan-May 2025	Jan-May 2024	Jan-May 2023	2025/2024	2025/2023	Jan-May 2025	Jan-May 2024	Jan-May 2023	2025/2024	2025/2023
Salted	19.049.079	9.854.365	4.320.674	93,3%	340,9%	-	-	-	-	-	52.527.078	31.114.523	9.554.219	68,8%	449,8%
Wet Blue	125.761.395	161.844.868	119.246.197	-22,3%	5,5%	32.736.039	32.581.131	24.088.391	0,5%	35,9%	133.871.305	133.898.994	96.580.428	0,0%	38,6%
Split WB	54.985.501	56.885.766	41.081.230	-3,3%	33,8%	18.858.741	20.917.145	15.831.552	-9,8%	19,1%	53.571.746	57.571.528	45.340.014	-6,9%	18,2%
Crust	44.452.498	64.560.016	47.867.884	-31,1%	-7,1%	4.803.479	6.383.608	4.176.575	-24,8%	15,0%	4.590.621	6.174.909	4.247.362	-25,7%	8,1%
Finished	238.199.153	249.447.300	247.837.392	-4,5%	-3,9%	22.738.512	21.840.395	20.709.295	4,1%	9,8%	20.146.121	19.122.707	18.202.199	5,4%	10,7%
Total	482.447.626	542.592.315	460.353.377	-11,1%	4,8%	79.136.771	81.722.279	64.805.813	-3,16%	22,1%	264.706.871	247.882.661	173.924.222	6,8%	52,2%

Source: MDIC/SECEX - Prepared by: CICB

BRAZILIAN EXPORTS OF BOVINE LEATHER
% FOB Value US$

Salted 3,9%
Wet Blue 26,1%
Split WB 11,4%
Crust 9,2%
Finished 49,4%

BRAZILIAN EXPORTS OF BOVINE LEATHER
% Area (sqm) *Only Full grain

Finished 37,7%
Wet Blue 54,3%
Crust 8,0%

BRAZILIAN EXPORTS OF BOVINE LEATHER
FOB Value US$

■ Jan-May 2025 ■ Jan-May 2024 ■ Jan-May 2023

Salted 19.049.079
Wet Blue 125.761.395
Split WB 54.985.501
Crust 44.452.498
Finished 238.199.153

- ## ANALYSIS OF TYPES OF LEATHER

Brazilian exports of bovine leather by type showed the following changes in the first five months of 2025, compared to the same interval of the previous year:

Wet blue, with a share of 26.1% (27.4%) in value and 54.3% (56.2%) in area, with decreases of 22.3% (-14.4%) in value and an increase of 0.5% (+9.9%) in area.

Split WB, with 11.4% (11.1%) of participation in value, shows decreases of 3.3% (-5.0%) in value and 9.8% (10.5%) in area.

Crust, with a share of 9.2% (9.8%) in value and 8.0% (8.3%) in area, shows reductions of 31.1% (-26.5%) in value and 24.8% (-18.9%) in area.
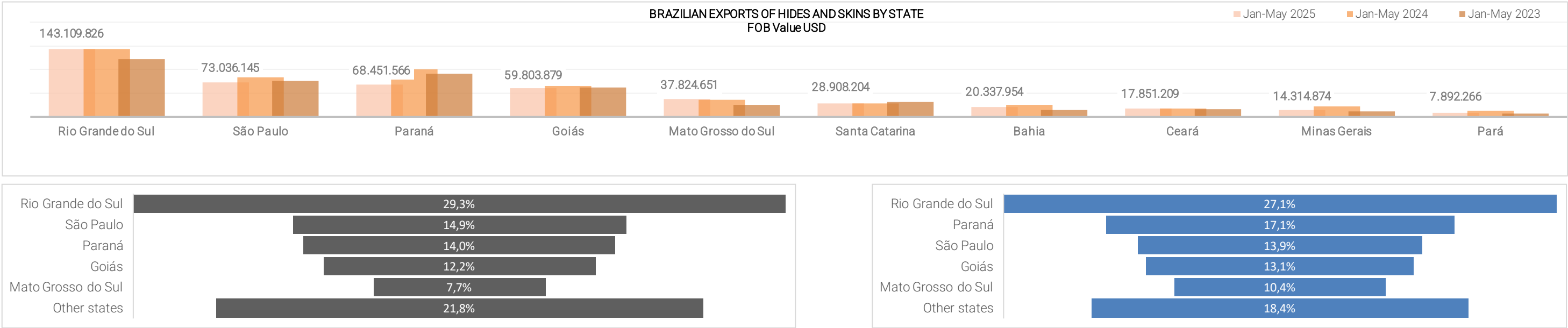
Finished leather, with a share of 49.4% (47.7%) in value and 37.7% (35.6%) in area, fell 4.5% (-6.9%), but increased 4.1% (+0.9%) in area.

While wet blue decreases its share in total exports, finished leather improves and is approaching stabilization

Although salted hides decreased the average of shipments in the last two months compared to the first quarter, they still continue at a high pace and double the value of the same month last year.

		FOB VALUE (US$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
		Jan-May 2025	Jan-May 2024	Jan-May 2023	2025	2025/2024	Jan-May 2025	Jan-May 2024	Jan-May 2023	2025	2025/2024	Jan-May 2025	Jan-May 2024	Jan-May 2023	2025	2025/2024
1	Rio Grande do Sul	143.109.826	143.951.089	121.425.084	29,3%	-0,6%	21.541.752	20.949.079	15.233.298	27,1%	2,8%	48.391.760	47.257.420	34.516.660	18,2%	2,4%
2	São Paulo	73.036.145	82.973.108	75.161.478	14,9%	-12,0%	11.094.291	11.460.755	9.462.622	13,9%	-3,2%	30.062.599	34.675.583	20.228.178	11,3%	-13,3%
3	Paraná	68.451.566	100.758.143	91.883.331	14,0%	-32,1%	13.567.632	15.772.626	13.977.483	17,1%	-14,0%	46.856.182	50.405.446	38.902.494	17,6%	-7,0%
4	Goiás	59.803.879	65.724.186	61.767.432	12,2%	-9,0%	10.449.561	9.668.919	8.913.171	13,1%	8,1%	33.847.636	31.451.480	27.380.349	12,7%	7,6%
5	Mato Grosso do Sul	37.824.651	35.336.911	25.321.423	7,7%	7,0%	8.254.719	6.779.619	5.483.824	10,4%	21,8%	29.780.831	22.696.879	19.858.734	11,2%	31,2%
6	Santa Catarina	28.908.204	27.884.567	32.131.739	5,9%	3,7%	4.242.974	3.686.353	3.719.486	5,3%	15,1%	11.073.536	9.174.772	7.525.625	4,2%	20,7%
7	Bahia	20.337.954	24.568.400	14.393.822	4,2%	-17,2%	2.427.989	3.409.407	2.146.908	3,1%	-28,8%	12.733.422	9.242.664	3.967.073	4,8%	37,8%
8	Ceará	17.851.209	17.411.878	16.163.117	3,6%	2,5%	1.736.071	1.706.412	1.432.703	2,2%	1,7%	2.806.649	2.523.639	2.056.079	1,1%	11,2%
9	Minas Gerais	14.314.874	22.052.275	11.732.444	2,9%	-35,1%	2.184.654	4.103.814	2.211.410	2,7%	-46,8%	9.276.072	10.181.136	4.787.778	3,5%	-8,9%
10	Pará	7.892.266	12.601.912	7.260.659	1,6%	-37,4%	2.294.531	2.589.689	1.466.434	2,9%	-11,4%	16.421.326	13.424.319	7.227.964	6,2%	22,3%
11	Mato Grosso	6.560.804	5.860.353	2.498.941	1,3%	12,0%	1.422.846	1.075.083	534.751	1,8%	32,3%	6.177.020	4.402.481	1.824.870	2,3%	40,3%
12	Espírito Santo	2.582.087	59.589	10.550	0,5%	4233,2%	43	44	105	0,0%	-2,3%	6.059.502	192.915	65	2,3%	3041,0%
13	Rio de Janeiro	2.460.991	1.583.394	2.207.028	0,5%	55,4%	28.602	25.694	67.216	0,04%	11,3%	14.543	131.488	193.955	0,01%	-88,9%
14	Piauí	1.880.509	816.158	644.551	0,4%	130,4%	98.893	43.369	33.245	0,1%	128,0%	782.836	24.610	19.912	0,3%	3081,0%
15	Rio Grande do Norte	1.775.289	1.521.687	1.035.960	0,4%	16,7%	0	0	0	0,0%	-	5.414.020	5.164.330	2.446.130	2,0%	4,8%
16	Pernambuco	980.870	1.557.392	1.099.736	0,2%	-37,0%	3.938	50.371	27.131	0,005%	-92,2%	3.207.592	4.495.805	2.231.862	1,2%	-28,7%
17	Rondônia	567.393	649.536	81.610	0,1%	-12,6%	150.659	176.507	21.104	0,2%	-14,6%	558.408	642.710	74.680	0,2%	-13,1%
18	Paraíba	262.059	0	37.830	0,1%	-	0	0	0	0,0%	-	916.660	0	78.000	0,3%	-
19	Maranhão	256.591	409.741	273.655	0,1%	-37,4%	68.586	51.978	60.060	0,1%	32,0%	491.442	369.889	133.130	0,2%	32,9%
20	Alagoas	225.904	0	0	0,05%	-	0	0	0	0,0%	-	861.300	0	0	0,3%	-
21	Amazonas	0	1.930.629	0	0,0%	-100,0%	0	378.542	0	0,0%	-100,0%	0	1.947.730	0	0,0%	-100,0%
22	Distrito Federal	0	241.870	324.468	0,0%	-100,0%	0	42.850	67.665	0,0%	-100,0%	0	213.783	357.065	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	489.083.071	547.894.006	465.954.698	100,0%	-10,7%	79.567.741	81.971.120	64.977.976	100,0%	-2,9%	265.733.336	248.619.088	174.383.123	100,0%	6,9%

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

BRAZILIAN EXPORTS OF HIDES AND SKINS BY STATE
FOB Value USD

Jan-May 2025   Jan-May 2024   Jan-May 2023

Rio Grande do Sul	29,3%
São Paulo	14,9%
Paraná	14,0%
Goiás	12,2%
Mato Grosso do Sul	7,7%
Other states	21,8%

Rio Grande do Sul	27,1%
Paraná	17,1%
São Paulo	13,9%
Goiás	13,1%
Mato Grosso do Sul	10,4%
Other states	18,4%

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- ## ANALYSIS OF STATES

During the accumulated interval of the year, the exports of the Brazilian states presented the following highlights:

Among the top 10, Mato Grosso do Sul continues with the best performance, with +7.0%, while Pará reaches a reduction of 37.4%. The states of Santa Catarina, with +3.7%, and Ceará, with +2.5%, also remain at positive levels.

Regarding the area shipped, we have double-digit increases in Mato Grosso do Sul, with +21.8%, and Santa Catarina with +15.1%. Other states with a positive performance in area are Goiás (+8.1%), Rio Grande do Sul (+2.8%) and Ceará (+1.7%).

The state of Mato Grosso, in the 11th position in the ranking, deserves to be highlighted for the growth of 12.0% in value and 32.3% in area.

The ranking of the states now shows Rio Grande do Sul in first place in the three indexes: 29.3% share in value, 27.1% in area and 18.2% in weight. São Paulo, with 14.9% in value, returns to second place, surpassing Paraná, which is in third, with 14.0% share. In area, Paraná follows in second in the ranking, with 17.1% against 13.9% in São Paulo. In fourth place is Goiás, with 12.2% in value and 13.1% in area.

- ## CLOSING REMARKS

The tariff war that began in April continues to negatively affect Brazilian leather exports, especially in shipments to China and Italy, the main buyer market in Europe.

Although the cumulative performance in the year is still negative, there was a recovery in sales to the United States in May. In that month, the volume exported to the North American market grew 11.8% compared to the same period of the previous year.

With regard to the types of leather exported, wet blue has been losing share in total sales, while finished leather has shown progress, contributing to sustain, at least in part, the volumes and values exported. In May, more than 5.1 million square meters of finished leather were exported — the best monthly result since October 2021.

Tariff disputes, instability and geopolitical tensions continue to influence the international scenario, directly affecting the purchasing behavior of Chinese customers, who continue to press for lower prices to place their orders. Despite this, there have been positive signs recently, with the suspension of the additional tariffs imposed by the United States for a period of 90 days, which brought some temporary relief to the market. However, the concrete effects of this measure should only be felt later, being reflected in future shipments.

Considering that, since the beginning of the trade war, uncertainties have only intensified, the road to resolving this conflict between the world's two largest economic powers tends to be long, full of challenges and unpredictable events. -