

SEPTEMBER 2025

Brazilian exports of Hides and Skins

Brazilian leather

apexBrasil

MINISTRY OF
DEVELOPMENT,
INDUSTRY, TRADE
AND SERVICES

BRAZILIAN GOVERNMENT
BRASIL
UNITING AND REBUILDING

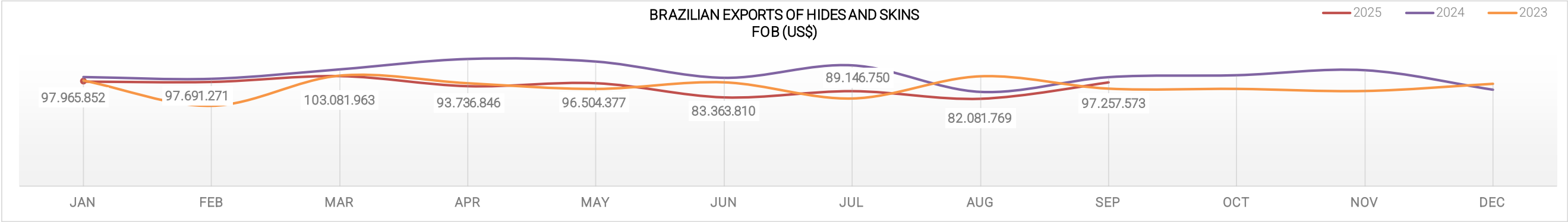
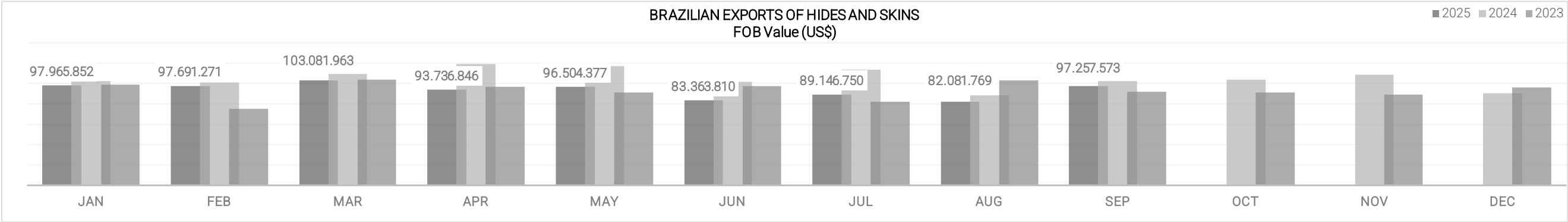
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SUMMARY		PAGE
1	BRAZILIAN EXPORTS OF HIDES AND SKINS - CHAPTER CODE 41.....	3
	ANALYSIS OF TOTAL EXPORTS.....	4
2	BRAZILIAN EXPORTS OF HIDES AND SKINS BY DESTINATION.....	5
	ANALYSIS OF MAIN DESTINATIONS.....	6
3	BRAZILIAN EXPORTS OF BOVINE LEATHER 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	97.965.852	102.231.845	99.097.256	8,3%	-4,2%	-1,1%	16.803.758	15.255.504	14.458.015	8,1%	10,1%	16,2%	59.127.692	42.745.080	40.842.514	18,2%	38,3%	44,8%
FEB	97.691.271	100.594.249	75.269.723	-0,3%	-2,9%	29,8%	16.755.825	14.792.606	10.666.731	-0,3%	13,3%	57,1%	57.507.076	46.844.191	29.776.931	-2,7%	22,8%	93,1%
MAR	103.081.963	109.365.779	103.785.252	5,5%	-5,7%	-0,7%	16.280.759	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	93.736.846	119.059.249	96.588.085	-9,1%	-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	96.504.377	116.642.884	91.214.382	3,0%	-17,3%	5,8%	14.809.643	17.328.197	12.063.660	-0,6%	-14,5%	22,8%	44.951.452	52.802.187	31.339.687	-5,7%	-14,9%	43,4%
JUN	83.363.810	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	89.146.750	113.124.002	82.168.631	6,9%	-21,2%	8,5%	14.238.928	16.661.127	11.107.588	6,1%	-14,5%	28,2%	45.280.820	46.784.480	29.554.021	12,4%	-3,2%	53,2%
AUG	82.081.769	88.415.511	103.150.225	-7,9%	-7,2%	-20,4%	13.459.540	13.039.334	14.634.581	-5,5%	3,2%	-8,0%	45.292.837	38.318.128	40.916.844	0,03%	18,2%	10,7%
SEP	97.257.573	102.126.294	91.485.697	18,5%	-4,8%	6,3%	17.157.177	15.932.097	13.493.620	27,5%	7,7%	27,2%	60.336.660	52.577.119	36.476.373	33,2%	14,8%	65,4%
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	840.830.211	1.256.057.257	1.116.751.780		-11,8%	0,1%	137.821.956	194.441.415	158.963.267		-3,9%	17,0%	456.929.238	597.691.046	430.611.610		5,0%	44,9%

Source: SECEX - Prepared by: CICB



■ ANALYSIS OF TOTAL EXPORTS

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Exports of hides and skins in September 2025, 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\$ 97.3 million.

This value represents an increase of 18.5% compared to the previous month, but a decrease of 4.8% compared to the same month last year, when exports totaled US\$ 102.1 million.

In volume, 17.2 million square meters and 60.3 thousand tons were exported, representing increases of 7.7% and 14.8%, respectively, compared to September 2024. Compared to August this year, there were also increases of 27.5% in the area and 33.2% in weight.

The period from January to September totaled US\$ 840.8 million, 11.8% below the same interval in 2024, also with a decrease of 3.9% in area, but an increase of 5.0% in weight.

BRAZILIAN EPORTS OF HIDES AND SKINS - DESTINATIONS

2025

COUNTRIES	FOB VALUE (US\$)			Share 2025	Δ 2025/2024	AREA (sqm)			Share 2025	Δ 2025/2024	WEIGHT (KG)			Share 2025	Δ 2025/2024
	Jan-Sep 2025	Jan-Sep 2024	Jan-Sep2023			Jan-Sep 2025	Jan-Sep 2024	Jan-Sep2023			Jan-Sep 2025	Jan-Sep 2024	Jan-Sep2023		
1 China + Hong Kong	262.642.797	312.813.958	261.808.039	31,2%	-16,0%	62.803.552	62.426.343	50.282.327	45,6%	0,6%	202.311.269	200.852.417	152.354.963	44,3%	0,7%
China	251.322.501	293.502.226	235.070.220	29,9%	-14,4%	60.403.988	58.738.183	45.286.582	43,8%	2,8%	195.906.932	190.566.536	139.485.511	42,9%	2,8%
2 United States	116.978.039	133.235.220	138.956.083	13,9%	-12,2%	9.836.475	10.191.194	10.518.306	7,1%	-3,5%	8.875.797	9.071.089	9.245.156	1,9%	-2,2%
3 Italy	93.426.258	113.170.586	103.011.992	11,1%	-17,4%	17.727.002	19.399.909	17.838.430	12,9%	-8,6%	59.576.550	62.006.502	57.835.662	13,0%	-3,9%
4 Vietnam	85.591.525	98.340.375	50.366.589	10,2%	-13,0%	17.614.950	19.725.980	9.877.057	12,8%	-10,7%	42.392.003	47.671.584	23.468.737	9,3%	-11,1%
5 Mexico	48.985.485	49.981.788	37.373.147	5,8%	-2,0%	4.238.514	4.830.617	3.558.274	3,1%	-12,3%	5.389.762	6.707.499	4.915.482	1,2%	-19,6%
6 Nigeria	23.617.549	5.780.602	2.323.959	2,8%	308,6%	10	0	0	0,0%	-	58.203.193	18.667.621	7.209.847	12,7%	211,8%
7 South Korea	20.495.215	12.573.718	40.608.814	2,4%	63,0%	2.025.476	1.184.851	3.846.862	1,5%	70,9%	1.945.144	1.265.113	4.651.261	0,4%	53,8%
8 Germany	18.943.762	25.792.959	25.581.685	2,3%	-26,6%	1.833.308	2.109.663	1.974.919	1,3%	-13,1%	2.231.111	1.807.303	1.668.202	0,5%	23,4%
9 Thailand	16.748.351	32.419.757	31.952.248	2,0%	-48,3%	2.050.698	4.146.533	3.295.082	1,5%	-50,5%	2.708.406	10.422.984	5.357.992	0,6%	-74,0%
10 Spain	11.656.764	7.435.310	7.074.988	1,4%	56,8%	2.812.481	1.756.036	1.779.755	2,0%	60,2%	7.066.654	4.601.375	5.005.149	1,5%	53,6%
Hong Kong	11.320.296	19.311.732	26.737.819	1,3%	-41,4%	2.399.564	3.688.160	4.995.745	1,7%	-34,9%	6.404.337	10.285.881	12.869.452	1,4%	-37,7%
11 Uruguay	9.719.868	10.343.876	9.684.329	1,2%	-6,0%	1.271.413	1.310.634	1.190.627	0,9%	-3,0%	3.667.890	4.986.399	3.556.512	0,8%	-26,4%
12 Taiwan	9.330.734	11.208.688	11.666.582	1,1%	-16,8%	2.256.934	2.304.355	2.783.640	1,6%	-2,1%	6.877.166	7.463.073	7.881.403	1,5%	-7,9%
13 Hungary	9.258.481	15.054.341	15.153.043	1,1%	-38,5%	945.701	1.332.531	1.228.993	0,7%	-29,0%	782.208	1.111.215	1.056.610	0,2%	-29,6%
14 Norway	8.829.491	8.442.107	6.631.394	1,1%	4,6%	601.617	577.299	459.194	0,4%	4,2%	453.708	411.351	321.631	0,1%	10,3%
15 Slovakia	8.664.950	10.549.067	6.209.741	1,0%	-17,9%	645.414	718.738	395.161	0,5%	-10,2%	575.190	666.635	386.267	0,1%	-13,7%
16 Tunisia	8.648.547	9.852.218	9.026.851	1,0%	-12,2%	543.135	635.974	570.071	0,4%	-14,6%	837.969	946.312	879.386	0,2%	-11,4%
17 Argentina	7.996.944	4.535.561	8.254.492	1,0%	76,3%	825.567	337.555	586.101	0,6%	144,6%	1.182.278	392.871	690.360	0,3%	200,9%
18 India	7.568.603	6.556.087	5.873.405	0,9%	15,4%	2.304.480	1.614.902	1.285.724	1,7%	42,7%	5.787.924	4.651.641	4.257.201	1,3%	24,4%
19 Cambodia	6.968.043	5.390.233	2.406.429	0,8%	29,3%	806.766	199.943	189.300	0,6%	303,5%	9.711.460	9.226.497	1.381.837	2,1%	5,3%
20 Turkey	5.146.904	5.314.720	4.704.131	0,6%	-3,2%	21.992	25.431	73.450	0,0%	-13,5%	18.744.444	17.531.122	10.046.136	4,1%	6,9%
21 Netherlands	4.942.999	6.606.355	7.401.806	0,6%	-25,2%	550.914	661.551	745.273	0,4%	-16,7%	549.095	645.097	722.319	0,1%	-14,9%
22 Bangladesh	4.878.553	6.160.493	1.663.449	0,6%	-20,8%	397.468	472.618	121.278	0,3%	-15,9%	572.902	746.399	180.490	0,1%	-23,2%
23 Portugal	4.809.042	4.156.853	3.709.272	0,6%	15,7%	396.318	345.572	343.003	0,3%	14,7%	649.333	560.007	804.675	0,1%	16,0%
24 Poland	4.646.598	4.168.674	4.186.365	0,6%	11,5%	432.993	369.857	382.218	0,3%	17,1%	350.775	311.966	314.860	0,1%	12,4%
25 Indonesia	4.206.519	10.554.449	2.869.641	0,5%	-60,1%	767.830	1.766.402	358.813	0,6%	-56,5%	1.793.431	3.189.411	272.049	0,4%	-43,8%
26 Colombia	3.396.200	3.127.529	1.125.927	0,4%	8,6%	664.466	475.751	132.275	0,5%	39,7%	2.004.802	1.794.880	391.448	0,4%	11,7%
27 France	3.088.021	3.409.428	3.474.812	0,4%	-9,4%	142.773	157.772	148.428	0,1%	-9,5%	219.048	232.936	223.078	0,0%	-6,0%
28 South Africa	2.954.810	2.173.674	2.879.435	0,4%	35,9%	369.751	268.892	296.929	0,3%	37,5%	528.266	361.249	458.225	0,1%	46,2%
29 Canada	2.935.469	3.214.525	3.360.844	0,3%	-8,7%	187.735	197.872	204.088	0,1%	-5,1%	169.846	222.682	185.889	0,0%	-23,7%
30 Dominican Republic	2.644.334	2.373.791	1.507.955	0,3%	11,4%	392.123	337.905	190.806	0,3%	16,0%	1.380.404	1.202.815	526.971	0,3%	14,8%
Others (2025: +48 countries)	21.109.356	28.344.504	29.339.526	2,5%	-25,5%	2.354.100	3.465.224	3.164.712	1,7%	-32,1%	9.391.210	15.481.843	9.088.914	2,1%	-39,3%
Total	840.830.211	953.081.446	840.186.973		-11,8%	137.821.956	143.347.904	117.821.096		-3,9%	456.929.238	435.209.888	315.338.712		5,0%

Source: MDIC/SECEX - Prepared by: CICB

■ ANALYSIS OF DESTINATIONS

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

China (excluding Hong Kong) has a share of 29.9% (previously 29.6%) in value and 43.8% (43.7%) in area, with a decrease of 14.4% (-16.1%) in value, but an increase of 2.8% (+1.2%) in area.

The United States in second place in the ranking, with a 13.9% (14.1%) share in value, and 7.1% (7.2%) in area, has decreases of 12.2% (-9.5%) in value and 3.5% (-1.3%) in area.

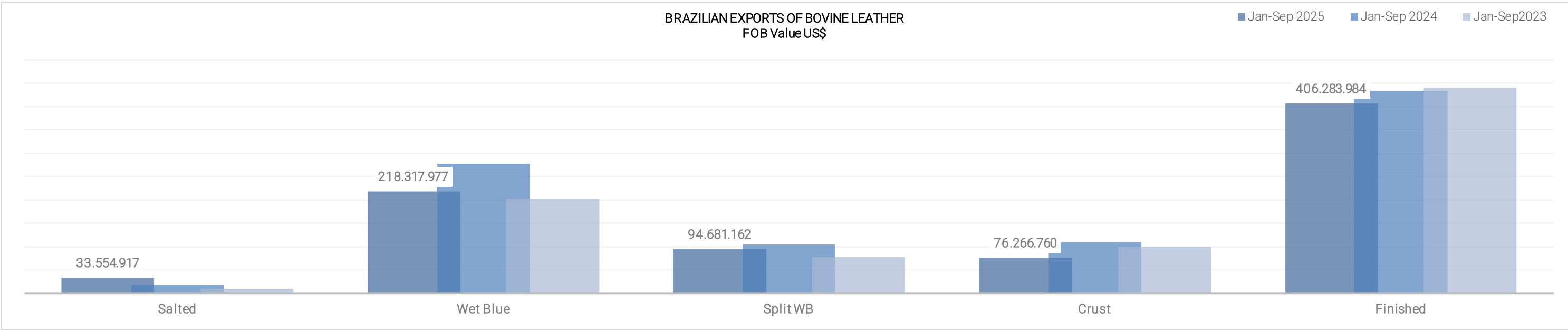
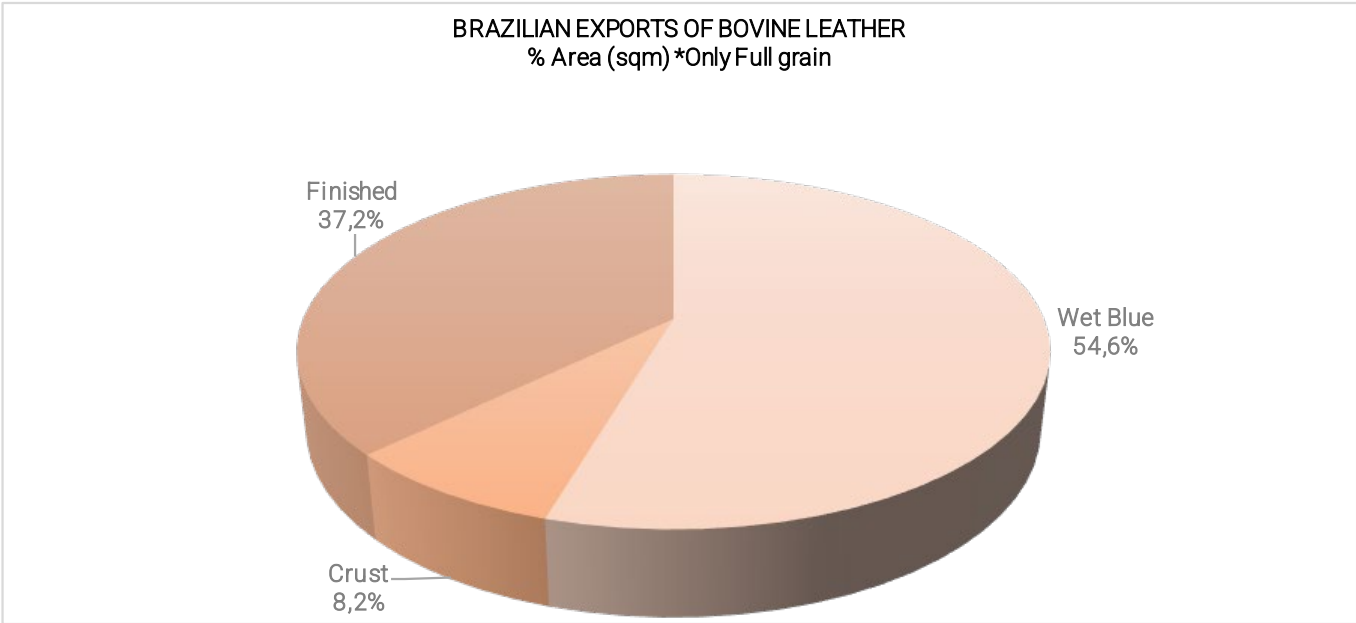
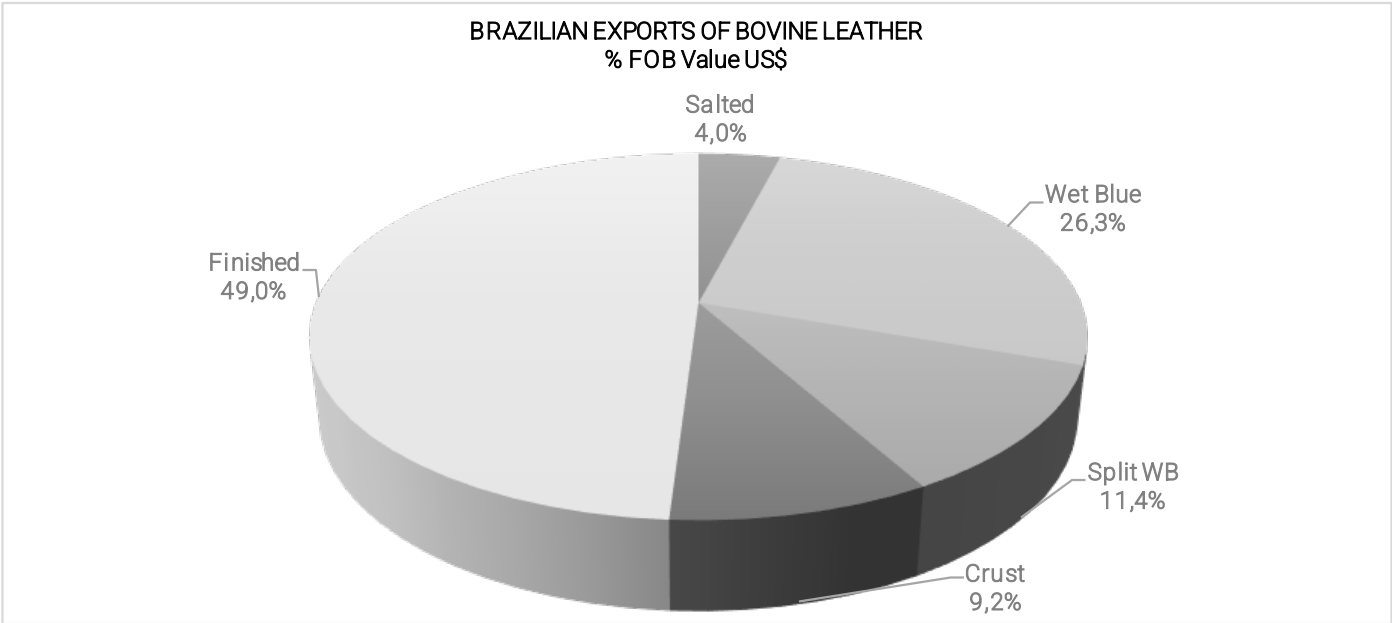
Italy in third, with a share of 11.1% (11.2%) in value and 12.9% (13.0%) in area, has decreases of 17.4% (-15.5%) in value and 8.6% (-5.0%) in area.

Among the three largest importers of Brazilian leather, we have different scenarios. While the United States and Italy reflect the geopolitical and tariff impacts, with worsening over the cumulative index up to the previous month, China recovers share and improves comparative indexes of value and volume.

Among the other TOP10 countries, we have a positive performance in shipments to South Korea (+63.0% in value and +70.9% in area) and to Spain (+56.8% and +60.2%).

TYPE OF LEATHER	FOB VALUE (US\$)			Δ		AREA (sqm)			Δ		WEIGHT (KG)			Δ	
	Jan-Sep 2025	Jan-Sep 2024	Jan-Sep2023	2025/2024	2025/2023	Jan-Sep 2025	Jan-Sep 2024	Jan-Sep2023	2025/2024	2025/2023	Jan-Sep 2025	Jan-Sep 2024	Jan-Sep2023	2025/2024	2025/2023
Salted	33.554.917	17.626.449	9.205.426	90,4%	264,5%	-	-	-	-	-	89.539.209	55.137.954	21.487.899	62,4%	316,7%
Wet Blue	218.317.977	277.907.946	203.474.500	-21,4%	7,3%	56.540.033	56.674.875	41.833.241	-0,2%	35,2%	227.817.102	230.646.415	168.051.181	-1,2%	35,6%
Split WB	94.681.162	104.544.414	77.632.113	-9,4%	22,0%	33.549.947	36.708.552	29.559.144	-8,6%	13,5%	93.993.249	103.945.354	83.849.867	-9,6%	12,1%
Crust	76.266.760	109.090.702	99.487.125	-30,1%	-23,3%	8.520.307	11.178.548	9.020.350	-23,8%	-5,5%	7.997.605	10.809.359	8.781.538	-26,0%	-8,9%
Finished	406.283.984	433.887.918	439.858.964	-6,4%	-7,6%	38.495.794	38.316.849	37.083.641	0,5%	3,8%	34.226.443	33.377.242	32.362.241	2,5%	5,8%
Total	829.104.800	943.057.429	829.658.128	-12,1%	-0,1%	137.106.081	142.878.824	117.496.376	-4,04%	16,7%	453.573.608	433.916.324	314.532.726	4,5%	44,2%

Source: MDIC/SECEX - Prepared by: CICB



■ ANALYSIS OF TYPES OF LEATHER

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

Wet blue, with a share of 26.3% (25.8%) in value and 54.6% (53.9%) in area, with decreases of 21.4% (-22.6%) in value and 0.2% (-0.4%) in area.

Split WB has 11.4% (11.3%) of share in value, with decreases of 9.4% (-11.7%) in value and 8.6% (-13.8%) in area.

Crust, with a share of 9.2% (9.4%) in value and 8.2% (8.4%) in area, shows reductions of 30.1% (-30.2%) in value and 23.8% (-23.5%) in area.

Finished leather registered a share of 49.0% (49.5%) in value and 37.2% (37.7%) in area, with a decrease of 6.4% (-6.6%) in value, but an increase of 0.5% (+0.3%) in area.

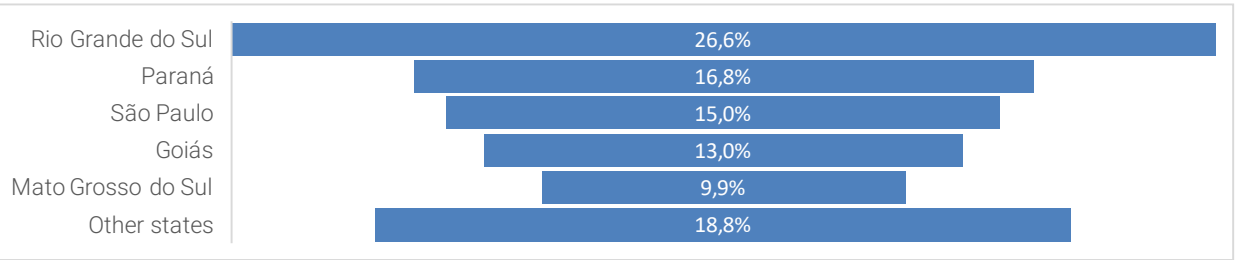
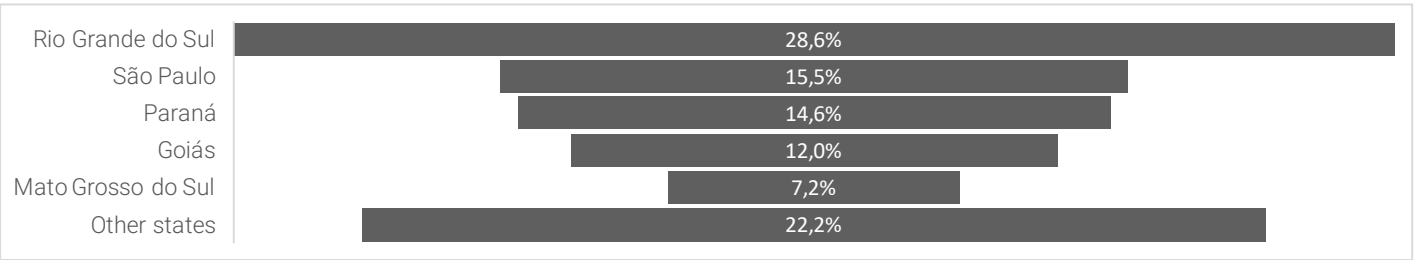
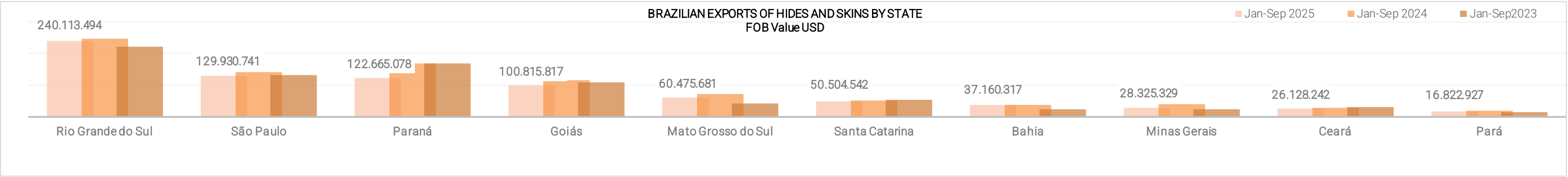
We have stability in the volume of finished leather and wet blue exports.

In both value and volume, wet blue leather had one of the best monthly performances of the year, with improvements in average export prices in September. Split wb also had the highest monthly volume exported in 2025.

Among the other animals, we highlight the positive performance in the year to date in the shipments of goat skins (which are close to doubling the exported value) and sheep skins, with +58.1%.

		FOB VALUE (US\$)				Δ	AREA (sqm)				Δ	WEIGHT (KG)				Δ
		Jan-Sep 2025	Jan-Sep 2024	Jan-Sep2023	2025	2025/2024	Jan-Sep 2025	Jan-Sep 2024	Jan-Sep2023	2025	2025/2024	Jan-Sep 2025	Jan-Sep 2024	Jan-Sep2023	2025	2025/2024
1	Rio Grande do Sul	240.113.494	245.946.994	220.674.186	28,6%	-2,4%	36.650.956	34.677.584	27.563.468	26,6%	5,7%	81.016.061	80.892.413	61.230.463	17,7%	0,2%
2	São Paulo	129.930.741	141.165.140	131.003.097	15,5%	-8,0%	20.647.641	20.130.416	15.899.146	15,0%	2,6%	54.445.439	57.915.401	33.421.792	11,9%	-6,0%
3	Paraná	122.665.078	168.315.342	168.966.485	14,6%	-27,1%	23.102.300	26.412.130	27.055.303	16,8%	-12,5%	78.472.416	80.923.255	75.114.002	17,2%	-3,0%
4	Goiás	100.815.817	117.120.626	109.774.170	12,0%	-13,9%	17.886.517	17.644.224	15.691.153	13,0%	1,4%	56.941.151	56.862.794	46.643.515	12,5%	0,1%
5	Mato Grosso do Sul	60.475.681	72.252.506	42.376.506	7,2%	-16,3%	13.595.272	13.988.141	9.254.774	9,9%	-2,8%	49.463.421	47.416.037	32.102.329	10,8%	4,3%
6	Santa Catarina	50.504.542	51.345.127	54.812.906	6,0%	-1,6%	7.511.621	7.015.407	6.502.539	5,5%	7,1%	19.756.947	17.009.809	13.063.374	4,3%	16,2%
7	Bahia	37.160.317	38.381.434	25.160.114	4,4%	-3,2%	4.456.627	5.067.722	3.596.542	3,2%	-12,1%	24.264.506	14.961.836	6.846.965	5,3%	62,2%
8	Minas Gerais	28.325.329	40.989.176	24.404.253	3,4%	-30,9%	4.391.962	7.634.424	4.495.145	3,2%	-42,5%	18.053.269	18.543.000	8.946.409	4,0%	-2,6%
9	Ceará	26.128.242	29.199.265	30.039.567	3,1%	-10,5%	2.439.571	2.881.205	2.712.925	1,8%	-15,3%	4.301.689	4.584.272	3.823.589	0,9%	-6,2%
10	Pará	16.822.927	20.565.084	15.683.778	2,0%	-18,2%	4.526.038	4.338.368	3.328.546	3,3%	4,3%	28.698.535	22.470.637	16.046.630	6,3%	27,7%
11	Mato Grosso	9.257.033	10.897.082	4.517.846	1,1%	-15,1%	2.068.796	2.109.058	1.001.542	1,5%	-1,9%	8.844.391	8.350.677	3.354.707	1,9%	5,9%
12	Rio de Janeiro	4.093.081	3.558.171	4.023.388	0,5%	15,0%	49.810	52.156	138.072	0,04%	-4,5%	26.108	164.985	325.821	0,01%	-84,2%
13	Rio Grande do Norte	3.636.403	2.778.307	2.755.585	0,4%	30,9%	0	0	0	0,0%	-	11.202.770	9.348.060	6.353.590	2,5%	19,8%
14	Espírito Santo	3.263.052	138.390	10.550	0,4%	2257,9%	101	133	105	0,0%	-24,1%	7.776.330	373.891	65	1,7%	1979,8%
15	Piauí	3.167.824	1.464.926	1.456.329	0,4%	116,2%	157.048	76.446	75.344	0,1%	105,4%	1.780.167	43.814	43.255	0,4%	3963,0%
16	Pernambuco	1.757.868	3.155.240	2.321.861	0,2%	-44,3%	9.624	62.743	37.279	0,01%	-84,7%	5.523.286	8.989.815	5.678.635	1,2%	-38,6%
17	Paraíba	819.227	0	52.191	0,1%	-	0	0	0	0,0%	-	2.609.170	0	106.000	0,6%	-
18	Rondônia	693.863	1.112.801	143.375	0,1%	-37,6%	185.264	298.300	37.068	0,1%	-37,9%	693.317	1.079.999	131.676	0,2%	-35,8%
19	Alagoas	636.262	91.180	0	0,1%	597,8%	0	0	0	0,0%	-	2.089.500	473.600	0	0,5%	341,2%
20	Maranhão	506.672	948.959	377.854	0,1%	-46,6%	142.508	221.121	86.508	0,1%	-35,6%	929.499	953.571	225.015	0,2%	-2,5%
21	Amazonas	40.750	3.365.064	232.400	0,005%	-98,8%	300	695.467	47.121	0,0%	-100,0%	464	3.507.230	234.310	0,0%	-100,0%
22	Sergipe	16.008	0	0	0,002%	-	0	0	0	0,0%	-	40.802	0	0	0,01%	-
23	Amapá	0	47.574	31.371	0,0%	-100,0%	0	0	0	0,0%	-	0	131.000	131.000	0,0%	-100,0%
24	Distrito Federal	0	241.870	585.874	0,0%	-100,0%	0	42.850	120.659	0,0%	-100,0%	0	213.783	641.495	0,0%	-100,0%
25	Not declared*	0	1.188	0	0,0%	-100,0%	0	9	0	0,0%	-100,0%	0	9	0	0,0%	-100,0%
26	Tocantins	0	0	783.287	0,0%	-	0	0	177.857	0,0%	-	0	0	874.075	0,0%	-
Total		840.830.211	953.081.446	840.186.973	100,0%	-11,8%	137.821.956	143.347.904	117.821.096	100,0%	-3,9%	456.929.238	435.209.888	315.338.712	100,0%	5,0%

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



■ ANALYSIS OF STATES

In the period up to September, exports from Brazilian states presented the following highlights:

Among the TOP10, some states are close to stability in value in exports, such as Santa Catarina, Rio Grande do Sul and Bahia, with -1.6%, -2.4% and -3.2%, respectively.

At the other extreme, with performances that worry the sector, are the states of Minas Gerais (-30.9%) and Paraná (-27.1%).

Considering the area shipped, the biggest increases are in Santa Catarina (+7.1%), Rio Grande do Sul (+5.7%) and Pará (+4.3%).

There is no change in the ranking, with Rio Grande do Sul in first place in the three indexes (28.6% share in value, 26.6% in area and 17.7% in weight), with São Paulo in second in value (15.5%) and Paraná in second in volume, both in area (16.8%) and weight (17.2%).

■ CLOSING REMARKS

Although the performance in August was weak, September brought expressive results of great relevance to the sector. The good performance demonstrates the resilience of the national leather industry and its ability to find ways in the face of market instabilities.

Even with the imposition of excessive tariffs by the United States on Brazil and with the still challenging scenario in Europe, the sector registered the highest monthly export volumes of the year in September, with an increase of 7.7% in area and 14.8% in weight compared to the same month in 2024.

When analyzing the three main export destinations, China's role as the main driver of positive results stands out, with an increase in the volume imported from Brazil between January and September. In terms of value, there was also an advance compared to August, although the cumulative index for 2025 still shows a decrease.

In the case of the United States, the September data deserve a more detailed analysis. Despite the 16.2% growth in the exported value compared to August, the total was still 10.9% below the monthly average recorded until July – the last month before the application of the new tariffs. In weight, there was also a recovery of 3.8% in the month.

Two points should be closely monitored by the national leather sector in the coming weeks. In Europe, the decision on extending the EUDR for another year may offer additional time for companies to adapt to the requirements of the standard. There are also discussions about possible simplifications in the requirements and reassessments in the risk classification of countries. In addition, the recent strengthening of relations between the presidents of Brazil and the United States may open space for a review of the tariffs imposed or the list of exceptions, in which leather has the possibility of being included. -