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 CICB

SECTORIAL SUSTAINABILITY REPORT – WET BLUE

2026 / BASE YEAR 2024

Brazilian Leather Industry



Production credits

The Sectoral Sustainability Report of the Brazilian Leather Industry 2026 / Base Year 2024 was produced by the Brazilian Leather project, a partnership between the Centre for the Brazilian Tanning Industry (CICB) and the Brazilian Trade and Investment Promotion Agency (ApexBrasil).

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Credits

About ApexBrasil – The Brazilian Trade and Investment Promotion Agency (ApexBrasil) works to promote Brazilian products and services abroad and to attract foreign investment to strategic sectors of the Brazilian economy. To achieve these goals, ApexBrasil carries out a wide range of trade promotion initiatives designed to increase exports and enhance the visibility of Brazilian products and services internationally. These initiatives include trade missions, business matchmaking rounds, support for Brazilian companies participating in major international trade fairs, visits by foreign buyers and opinion leaders to learn about Brazil’s productive structure, among other business platforms aimed at strengthening the Brazil brand. The Agency also works in coordination with public and private stakeholders to attract foreign direct investment (FDI) to Brazil, focusing on strategic sectors that contribute to the competitiveness of Brazilian companies and the country’s economic development..

About Brazilian Leather – The sectoral internationalization project for the Brazilian leather industry, Brazilian Leather is carried out by the Centre for the Brazilian Tanning Industry (CICB) in partnership with ApexBrasil (the Brazilian Trade and Investment Promotion Agency). The project’s strategies to strengthen the presence of Brazilian leather in international markets include encouraging the participation of tanneries in leading global industry trade fairs and organizing trade missions focused on strengthening relationships between Brazilian suppliers and buyers from other countries. More information at www.brazilianleather.com.br

About CICB – The Centre for the Brazilian Tanning Industry (CICB) represents companies that produce leather in Brazil. Since its founding in 1957, CICB has worked to promote the growth, qualification, strengthening and integration of the sector. Sustainability guides the organization’s activities, which include initiatives in technology, professional training, dialogue with government authorities, and the alignment of industry priorities with public policies. CICB also promotes the commercial development of leather, supports the defense of sector interests, builds reputation and image for Brazilian leather, and advances technical qualification, design, research and market intelligence. The organization also carries out institutional representation, promotes connections and dialogue across the production chain, and organizes working groups—such as Traceability and Communication—with members throughout the country.

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Eduardo Seleme

Chairman of the Board of Directors of CICB

Sustainability has become a key concept in the Brazilian leather industry. It increasingly guides the sector's processes, planning, investments and actions. Therefore, the expectation and satisfaction surrounding the first edition of the Sectoral Sustainability Report of the Brazilian Leather Industry 2026 / Base Year 2024 have become quite natural.

This report presents the national averages for environmental, social and governance indicators related to wet blue leather production in Brazil. These data allow us to assess the country's progress and maturity in adopting best industrial practices. The information reflects national averages rather than individual company data, making this publication a unique and historic document for the sector.

The collective strength, collaboration and unity of Brazilian tanneries made this report possible. Invited to contribute to the development of a sustainability indicator platform, 28 production units accepted the challenge, dedicated specialized professionals to regularly provide information, and followed the evolution of the project.

To all these companies, we extend our sincere thanks.



*CICB Board
of Directors*



CICB Board of Directors

MARCH, 1st 2026

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SINCURT

Mato Grosso: Sebastião Morais da Silva
(Durlicouros)



This is the Sectoral Sustainability Report of the Brazilian Leather Industry 2026 / Base Year 2024.

This document presents indicators, figures and results related to the environmental, social and corporate governance dimensions of wet blue leather production in Brazil for the years 2023 and 2024. The data presented here were collected from the operations of 28 wet blue leather production units in Brazil, all belonging to the largest business groups in the country's tanning industry. Together, these units account for the production of:

21,713,011 wet blue pieces produced in 2023

23,254,042 wet blue pieces produced in 2024

Introduction



Each indicator presented in this report highlights specific information regarding the scope of the sample on its respective page.

The collection, organization and presentation of the data were coordinated by the Brazilian Leather project, a partnership between the Centre for the Brazilian Tanning Industry (CICB) and the Brazilian Trade and Investment Promotion Agency (ApexBrasil).

To support the success of this initiative, an important partner was selected: the ESG management platform ESG Now.

Through ESG Now, the Brazilian Leather project developed and customized a software system with indicators related to tanning production in Brazil. The 28 wet blue production units participating in this report have fed the platform with their data over recent years, enabling the calculation of the sector averages presented in this publication. All data were treated confidentially, with no sharing of company-specific information, names or figures among participating companies.

The consolidation of national averages allows Brazilian tanneries – as well as international stakeholders – to understand how their indicators relate to the broader outlook of the sector and to support decision-making aimed at continuous improvement. The overview provided in this publication also serves as an important reference for guiding collective initiatives by CICB and the Brazilian Leather project.

Enjoy the reading.

March 2026.

The Brazilian Leather Industry in Numbers

Tens of millions of hides are tanned each year in facilities spread across the country, built upon a culture and expertise rooted in the tanning craft and deeply connected to local communities. The Brazilian leather industry is rich and diverse, and its key figures are presented below.

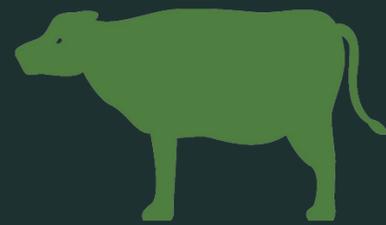
Where Our Production Is Located

Leather production units across Brazilian territory (at all stages of finishing)

Total: 222

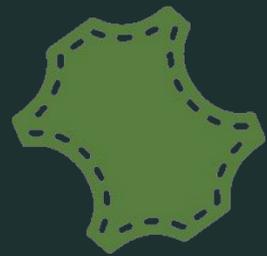


Source: MTE RAIS in the Study of the Brazilian Tanning Industry, published in 2024. It should be noted that the information on the number of production units considered facilities with more than 10 employees.



Annual leather production:
40 million bovine hides
5 million from other animals

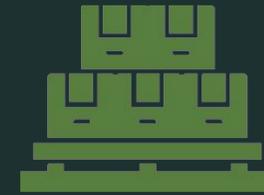
Source: annual sector estimates based on slaughter data in Brazil.



Share of exports and domestic market in Brazilian leather production:

70% exports
30% domestic market

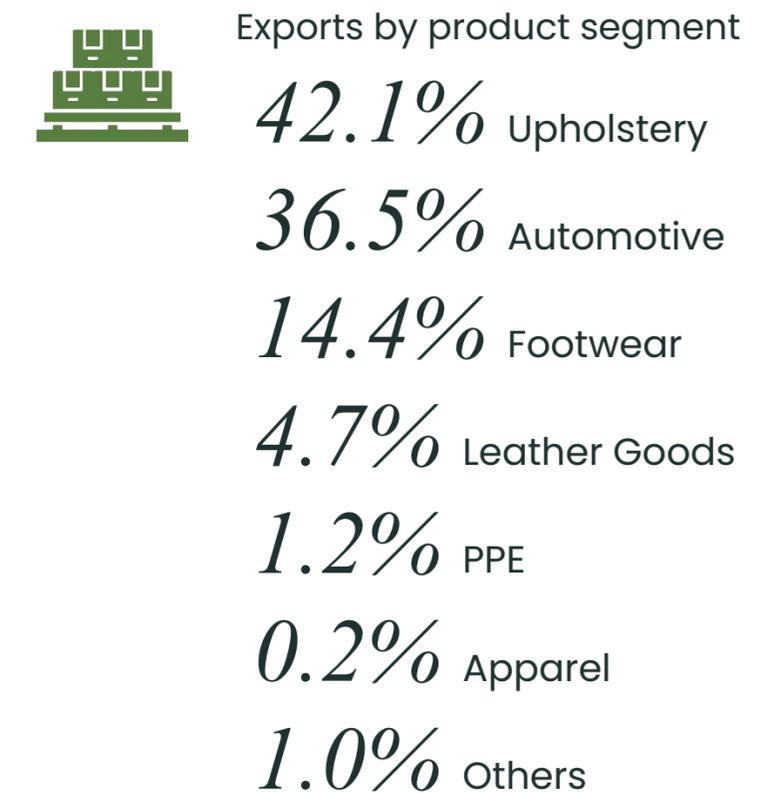
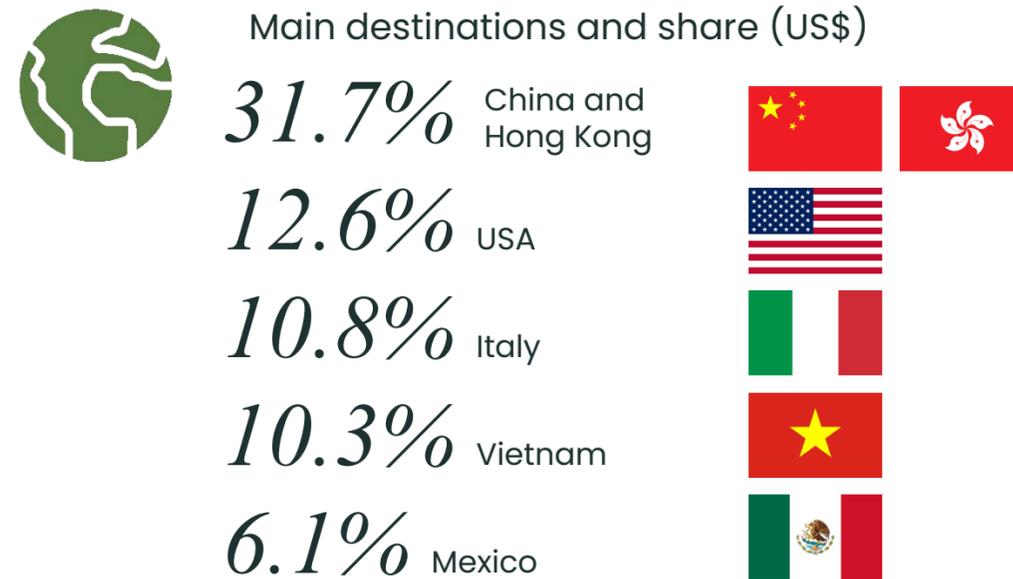
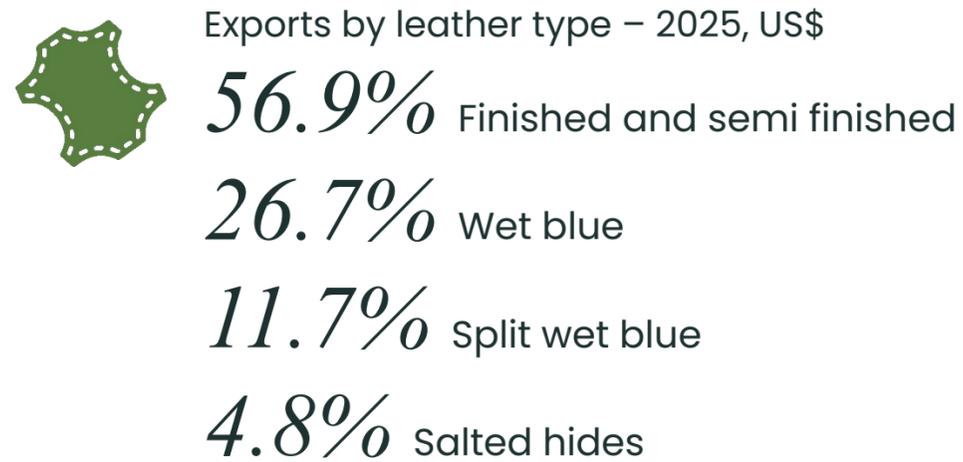
Source: Study of the Brazilian Tanning Industry, published in 2024.



Domestic market sales by product segment:

36.8% Footwear
29.0% Upholstery
14.0% PPE
6.4% Automotive
5.0% Leather Goods
0.3% Apparel
8.6% Others

Source: Study of the Brazilian Tanning Industry, published in 2024.



Source: Secretariat of Foreign Trade of the Ministry of Development, Industry, Trade and Services.

Indicators

In the following pages, you will find the results of wet blue leather production in Brazil for the years 2023 and 2024, presented through a series of sustainability indicators. Each indicator highlights specific information regarding the scope of the sample within the dataset.



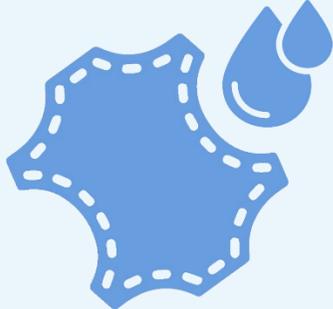
Water Consumption per Piece

Water is an essential input in leather production. Over the years, the sector has invested heavily in research, innovation and technology to reduce water consumption, promoting resource reuse, optimizing processes and improving treatment systems. As a result, a gradual reduction in water consumption per piece has been achieved in the wet blue production process.

Water Consumption per Piece

Wet Blue – Sector Average

Pieces produced by the companies that contributed to the report
2023: 21,713,011 WET BLUE HIDES | **2024:** 23,254,042 WET BLUE HIDES

2023	
	<p>0.257 m³ PER PIECE</p>
<p>SAMPLE SIZE: 19,427,492 WET BLUE HIDES</p>	
<p>89% of the total pieces produced by the companies that contributed to the report.</p>	

2024	
	<p>0.254 m³ PER PIECE</p>
<p>SAMPLE SIZE: 21,171,727 WET BLUE HIDES</p>	
<p>91% of the total pieces produced by the companies that contributed to the report.</p>	

Stories That Inspire

Curtume Minuano



“The company has consistently adopted practices aimed at reducing water consumption in its production processes, with a focus on operational efficiency and environmental responsibility.

Among the main actions implemented are the recycling of process baths throughout the production cycle and the preservation of hair during the liming process. These measures have directly contributed to reducing water consumption and the generation of liquid effluents.

Adjustments have also been made to processing times and volumes, including the implementation of shorter baths with lower water consumption, without affecting the quality of the leather produced.

These initiatives reflect ongoing work in operational control and improvement, already resulting in a reduction in specific water consumption and strengthening the responsible management of water resources.”

The reports featured in the Stories That Inspire section are not necessarily related to the data collected and presented in this publication.



Electric Energy Consumption per Piece

In all industries, electricity consumption is a key factor when assessing and advancing sustainability and efficiency indicators. In wet blue production in Brazil, this is no different: energy consumption is a central focus of projects and continuous improvement efforts in machine operations, effluent treatment plants, workplace environments, and all other production processes.

Electric Energy Consumption per Piece

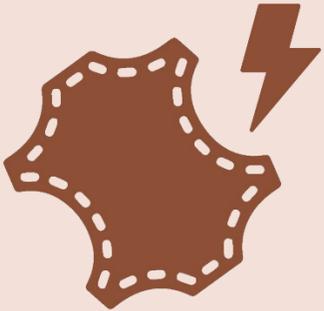
Wet Blue – Sector Average



Pieces produced by the companies that contributed to the report

2023: 21,713,011 WET BLUE HIDES | **2024:** 23,254,042 WET BLUE HIDES

2023



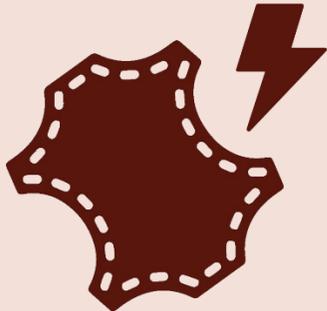
3.957 kwh

PER PIECE

SAMPLE SIZE: 18,244,063 WET BLUE HIDES

84% of the total pieces produced by the companies that contributed to the report.

2024



4.071 kwh

PER PIECE

SAMPLE SIZE: 18,348,508 WET BLUE HIDES

79% of the total pieces produced by the companies that contributed to the report.

Stories That Inspire

Matriz Energética no Brasil



With an electricity matrix historically based on hydropower, Brazil has been accelerating diversification through wind, solar and distributed generation. As a result, the country continues to maintain one of the cleanest electricity systems in the world. Data from the National Energy Balance (BEN 2025, base year 2024) indicate that renewable sources accounted for 88.2% of Brazil's electricity generation in 2024. In the same year, wind and solar photovoltaic energy together reached 23.7% of total generation, with wind power expanding by 12.4% and solar by 39.6%. Domestic electricity supply reached 762.9 TWh, an increase of 5.5% compared to 2023.

Expansion remains strong: from January to October 2025, installed generating capacity increased by 6,564.81 MW, with 113 new plants, according to ANEEL. In the broader energy mix, renewables accounted for 50% of Brazil's energy matrix in 2024, nearly four times the global average. The outlook is also positive in terms of efficiency, with a 1.18% improvement in the ODEX index (2023 vs. 2005) and accumulated energy savings of around 263 billion kWh through the Procel program since 1986.

The reports featured in the Stories That Inspire section are not necessarily related to the data collected and presented in this publication.



Chemical Consumption per Piece

Partnerships with suppliers, research and advanced production technologies have enabled increasingly efficient use of chemical products in Brazil's leather industry. Properties such as resistance, softness, aesthetics and durability are directly related to this input, which remains a constant focus of the industry's efforts to improve performance and efficiency.

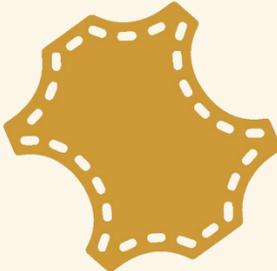
Chemical Consumption per Piece

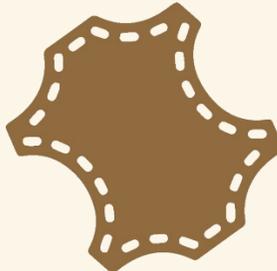
Wet Blue – Sector Average



Pieces produced by the companies that contributed to the report

2023: 21,713,011 WET BLUE HIDES | **2024:** 23,254,042 WET BLUE HIDES

2023	
	5.425 kg PER PIECE
SAMPLE SIZE: 13.182.398 WET BLUE HIDES	
61% of the total pieces produced by the companies that contributed to the report.	

2024	
	5.519 kg PER PIECE
SAMPLE SIZE: 13.596.561 WET BLUE HIDES	
58% of the total pieces produced by the companies that contributed to the report..	

Stories That Inspire

Grupo Viva



“In the leather industry, the use of chemical inputs has always been a determining factor for the performance and efficiency of production processes, directly influencing the quality of the final product. In recent years, however, this topic has also become central to discussions on sustainability, regulatory compliance and international competitiveness. In this context, the strategy adopted by Grupo VIVA (Viposa and Vancouros) stands out, promoting a consistent transformation in the way chemical inputs are managed and applied in its operations.

The company began treating these inputs as critical control variables, investing in technically rigorous selection, standardization, and the review of formulations, dosages and application methodologies. Starting in 2011, this movement gained greater strength with the internal production of chemical inputs, enabling greater control over product composition, performance and alignment with the specific requirements of leather processing.

The results of this integrated model are measurable. Grupo VIVA achieved a significant reduction in the consumption of chemical inputs without compromising the quality of the leather produced. The adoption of more concentrated and technically adjusted inputs reduced excess use, improved traceability and lowered transportation and storage volumes, also generating positive impacts on environmental performance.

This experience demonstrates that production efficiency, technological innovation and sustainability are not competing objectives, but complementary ones—when the use of chemical inputs is guided by technical knowledge, rigorous process control and structured governance.”

The reports featured in the Stories That Inspire section are not necessarily related to the data collected and presented in this publication.



Atmospheric Emissions per Piece

Monitoring, control and reduction measures for atmospheric emissions are part of the routine of wet blue leather production in Brazil. With the objective of minimizing impacts and meeting environmental and regulatory requirements, tanneries have invested in more efficient technologies, filtration systems and improved operational practices to reduce the release of gases, vapors and particles into the atmosphere.

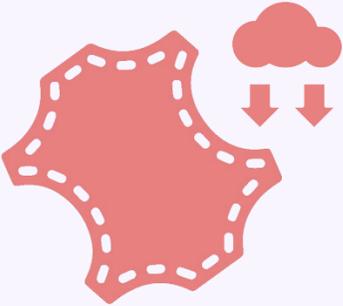
Atmospheric Emissions per Piece

Wet Blue – Sector Average



Pieces produced by the companies that contributed to the report
2023: 21,713,011 WET BLUE HIDES | **2024:** 23,254,042 WET BLUE HIDES

2023

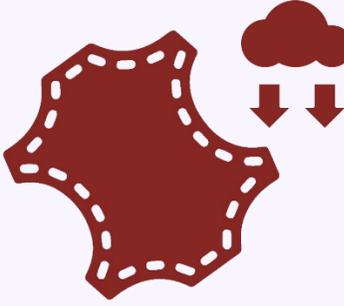


0.831 kgCO₂eq
PER PIECE

SAMPLE SIZE: 10,703,005 WET BLUE HIDES

49% of the total pieces produced by the companies that contributed to the report.

2024



0.749 kgCO₂eq
PER PIECE

SAMPLE SIZE: 11,557,739 WET BLUE HIDES

50% of the total pieces produced by the companies that contributed to the report.

Stories That Inspire

JBS Couros



“As part of its commitment to innovation and responsibility, JBS Couros developed Kind Leather, a strategic brand that guides the development of solutions aimed at reducing environmental impact, enhancing traceability, and improving production efficiency across the entire value chain. The platform promotes the intelligent use of raw materials, increases cutting yield, strengthens integration among different links in the value chain, and applies technologies that optimize both industrial performance and the environmental outcomes of production processes.

This efficiency is reflected in measurable results. With the implementation of Kind Leather solutions, we have achieved a reduction of up to 15% in the Global Warming Potential of leather up to the cutting stage.

By improving the use of hides from the earliest stages of processing, the company has increased the generation of co-products by approximately 5.3%. Portions that would not be transformed into leather are directed to other industrial sectors, such as the food, pharmaceutical, and hygiene and cleaning industries. This practice significantly reduces waste generation and positions JBS Couros as an integrated and responsible industry, prepared to meet the challenges of the future.”

The reports featured in the Stories That Inspire section are not necessarily related to the data collected and presented in this publication.



Liquid Effluent Management per Piece (% by volume)

The management of liquid effluents is an essential component of environmental responsibility in production processes. It involves the control, treatment and proper disposal of liquid waste, which, in the case of tanneries, includes well-established processes for reuse and operational control. Regulatory compliance and the strengthening of sustainability commitments are reflected in this indicator for Brazilian wet blue leather production.

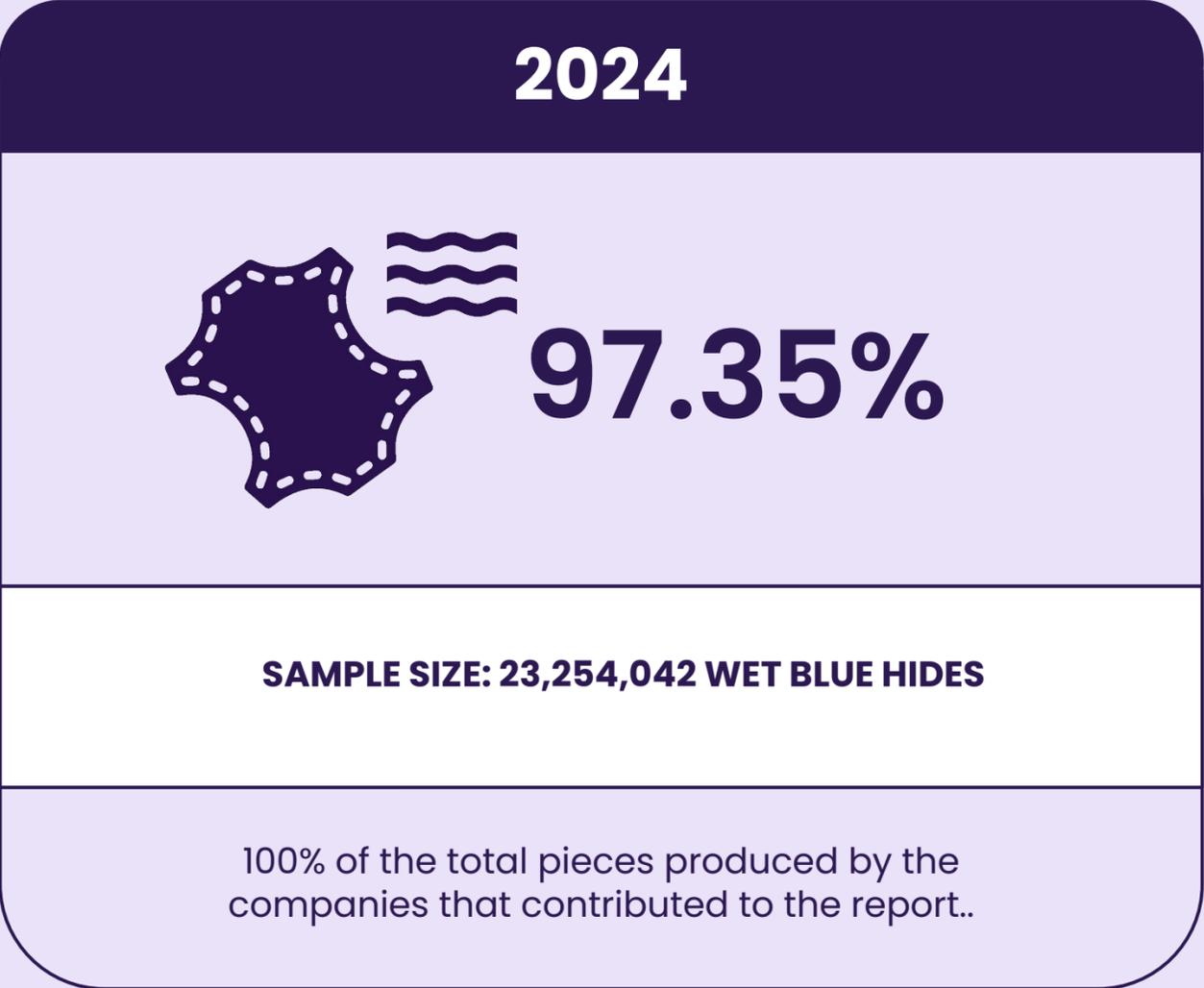
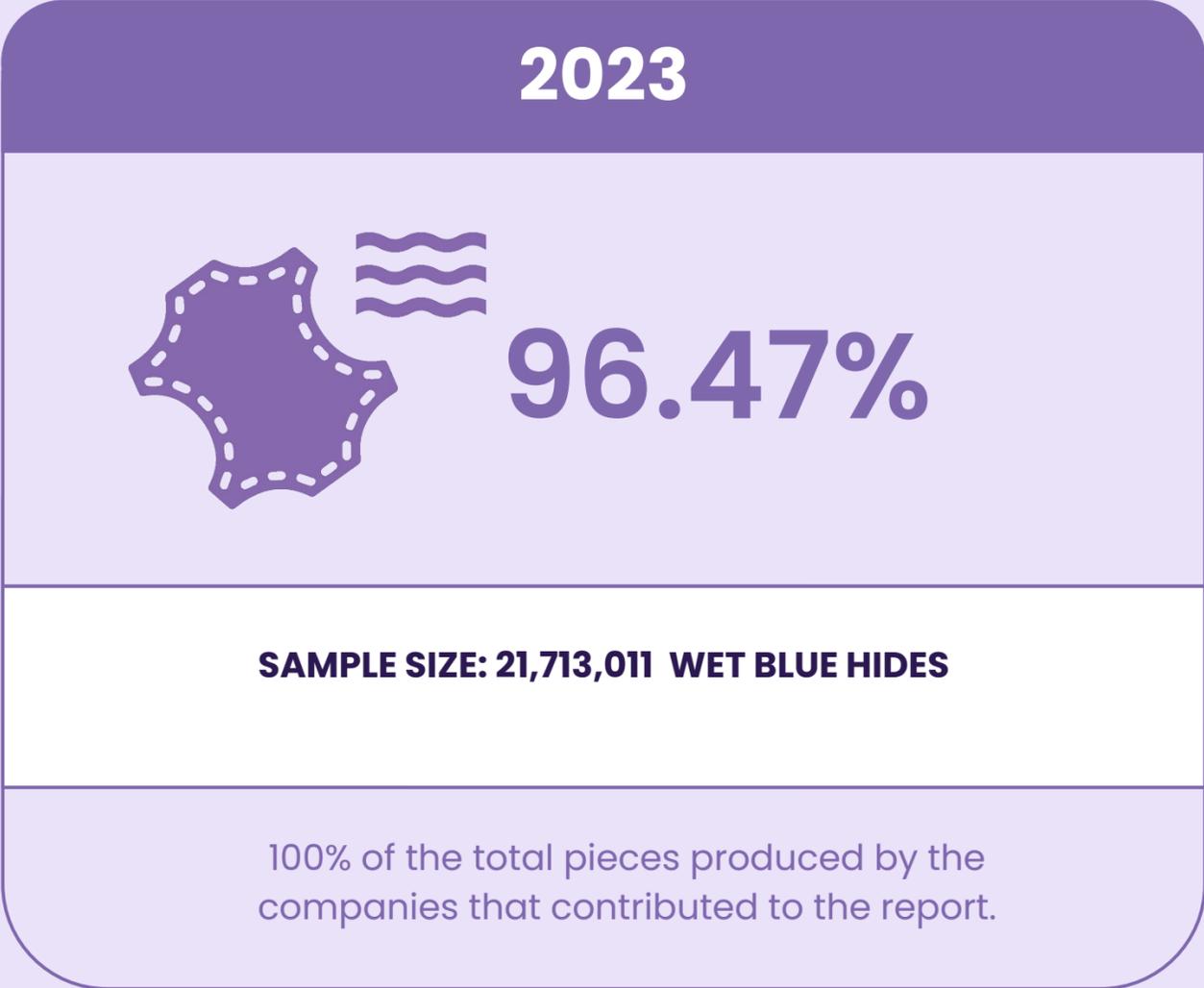
Liquid Effluent Management per Piece (% by volume)

Wet Blue – Sector Average



Pieces produced by the companies that contributed to the report

2023: 21,713,011 WET BLUE HIDES | **2024:** 23,254,042 WET BLUE HIDES





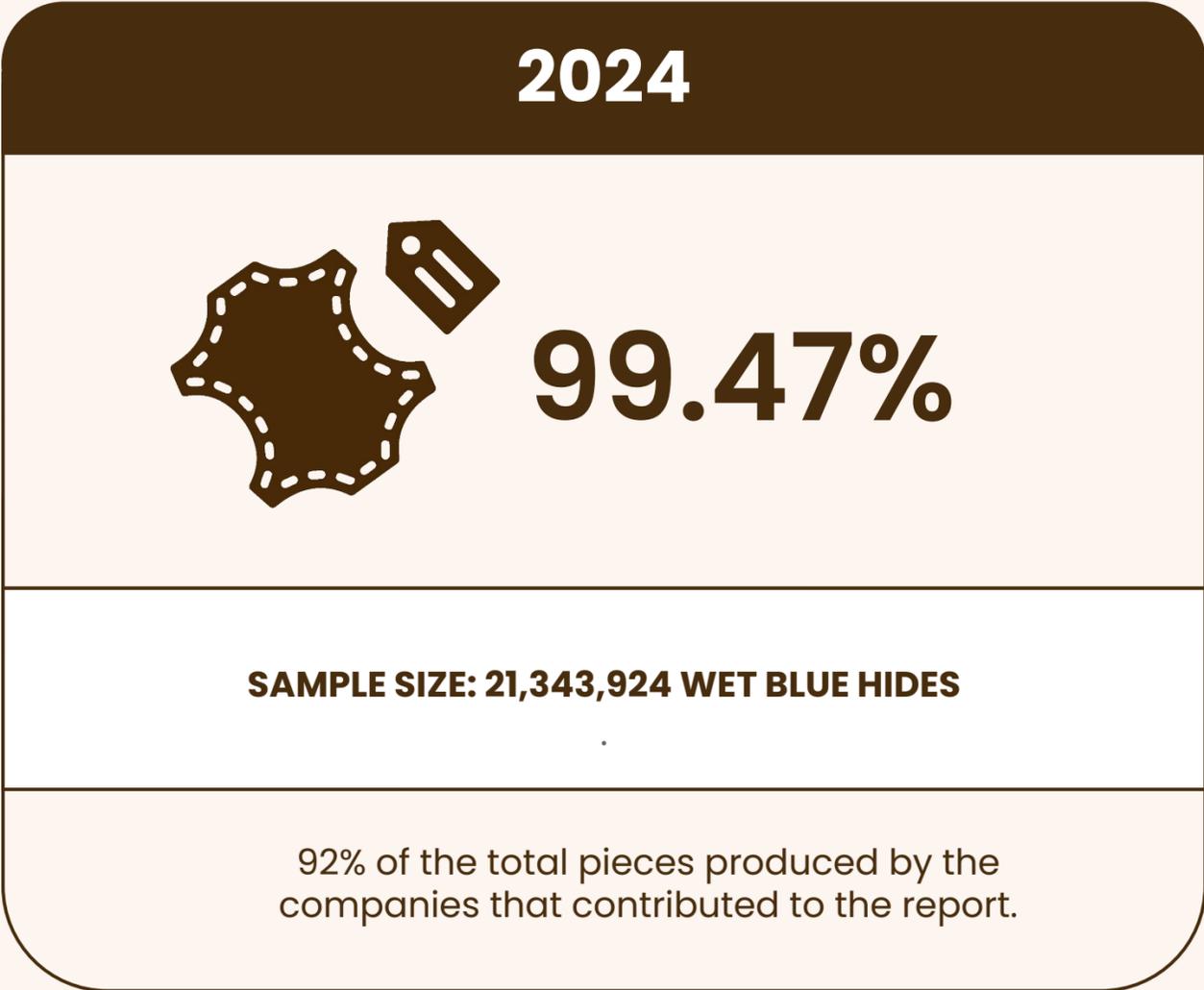
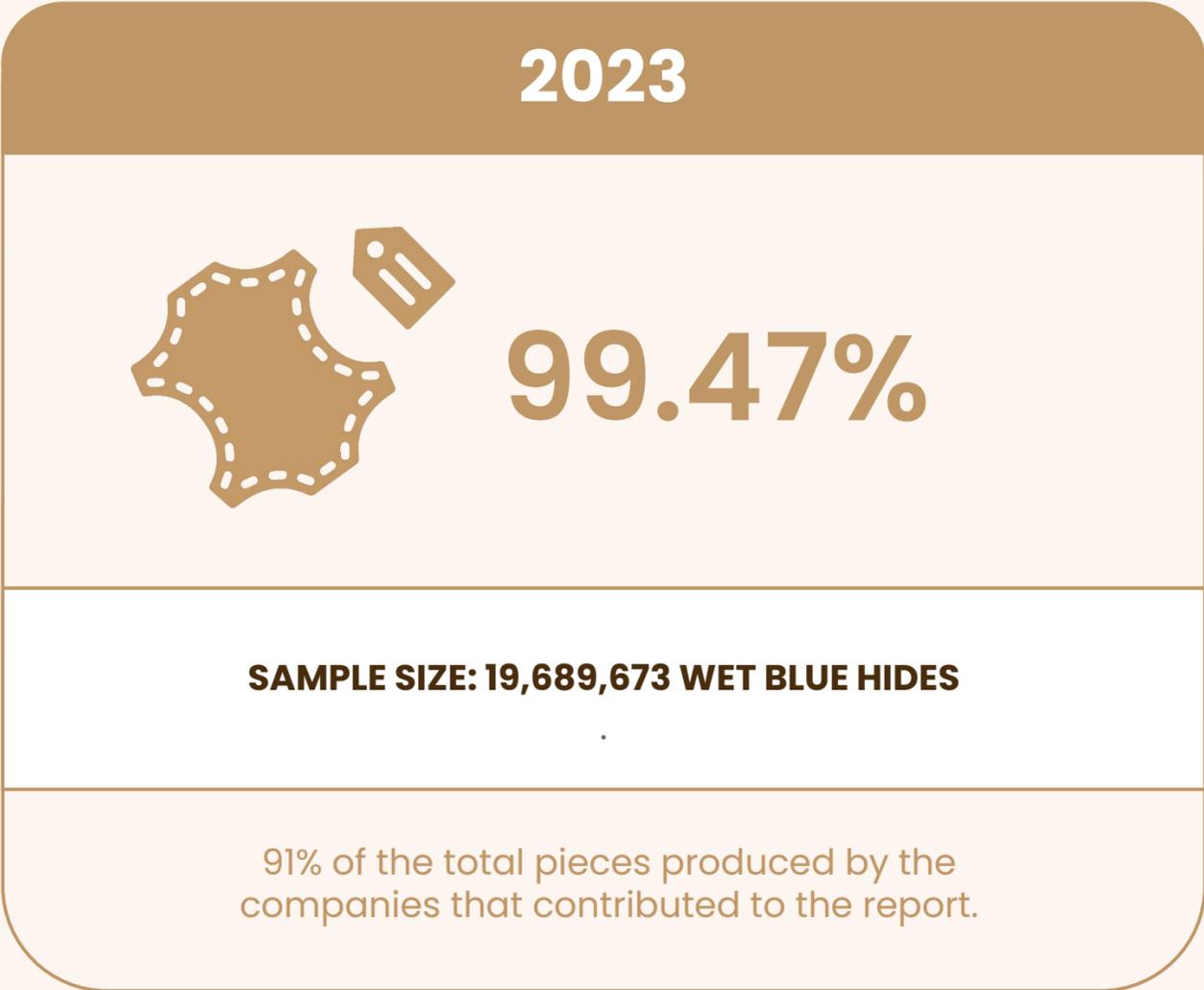
Raw Material Traceability

A comprehensive, precise and detailed view of the flow of raw hide within a tannery enables the efficient identification of technical issues, process analysis, resource management and the reduction of consumption. This indicator refers to the traceability of raw materials from their receipt through shipment within the tannery's industrial process for the production of wet blue leather.

Raw Material Traceability
Wet Blue – Sector Average



Pieces produced by the companies that contributed to the report
2023: 21,713,011 WET BLUE HIDES | **2024:** 23,254,042 WET BLUE HIDES



Stories That Inspire

Minerva Leather



“Aligned with its commitment to sustainable livestock production, Minerva Leather continuously invests in traceability, socio-environmental monitoring, environmental management and market innovation, aligning its practices with the highest global standards of compliance. In this context, the company has strengthened the Full Traceable Program, representing a significant step forward in full traceability by enabling the delivery of hides with verified socio-environmental compliance to both national and international clients.

The Full Traceable Program is structured based on the following principles:

- Traceability from the farm of origin to the final client
- Individual identification of animals through ear tags under the Brazilian System for Individual Identification of Cattle and Buffalo (SISBOV)
- Independent auditing of the process by third-party companies duly accredited by the Ministry of Agriculture and Livestock

Additionally, with regard to direct suppliers, Minerva implements:

- Socio-environmental monitoring of 100% of direct supplier farms, from all origins, with transaction-by-transaction assessments considering environmental, labor and land-related criteria
- Physical identification of hides through specific stamps, ensuring segregation and traceability of the product throughout the value chain.”

The reports featured in the Stories That Inspire section are not necessarily related to the data collected and presented in this publication.



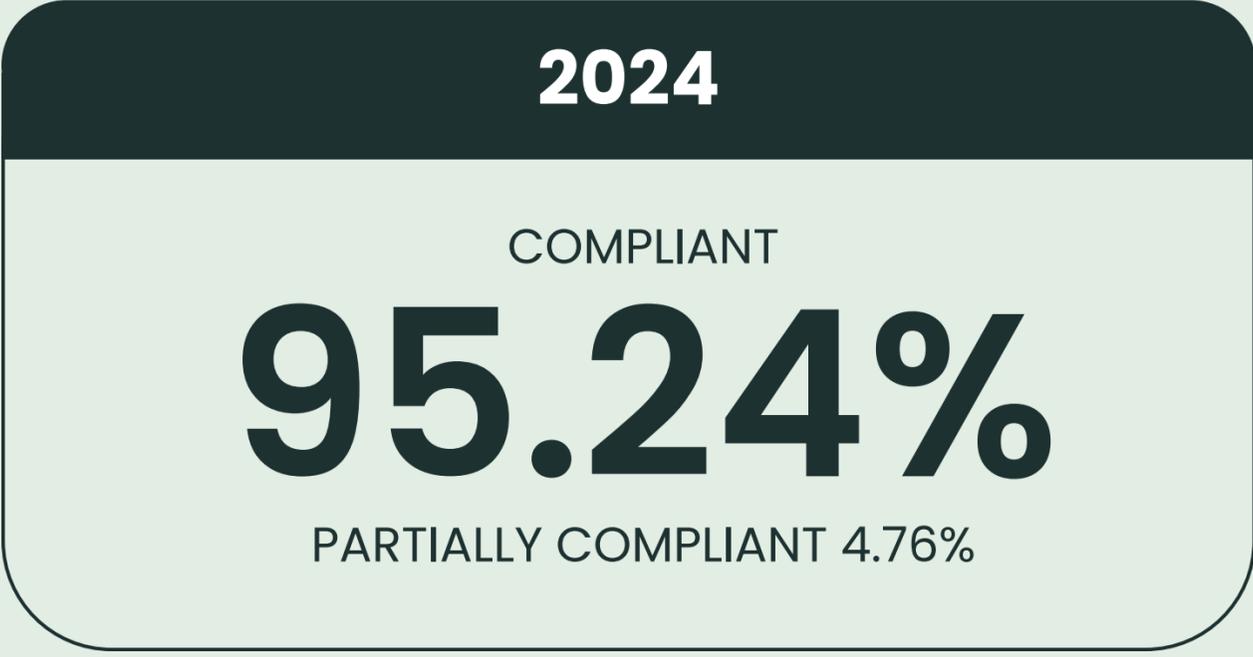
Qualitative Indicators

Practices related to control and management, governance and strategy, human rights, and labor relations and practices make up the qualitative indicators collected from Brazilian tanneries that participated in this analysis. These pillars guide decision-making, reduce risks, and ensure respect for people within the workplace.

Human Rights



Labor Relations and Practices



Governance and Strategy



Management Practices and Controls



Stories That Inspire

Fuga Couros



“Founded in December 2003, the José and Lídia Fuga Social and Cultural Foundation is located in the city of Marau, in Rio Grande do Sul, and stems from a history built on hard work, dedication and a deep commitment to people through the tannery Fuga Couros. The Foundation keeps alive the values of solidarity, generosity and community engagement that have always marked the trajectory of José and Lídia Fuga — the couple who initiated this legacy.

With free projects aimed at children, youth and adults, the Foundation supports the personal, cultural and professional development of the population of Marau and the surrounding region. The community library, digital inclusion initiatives, cultural activities such as choir and guitar lessons, professional qualification courses, English language education and sports programs serve as instruments of transformation, expanding opportunities and strengthening community bonds.

This social work represents a concrete way of honoring the spirit of dedication, social responsibility and care for others cultivated by the patriarch and matriarch since the earliest days of the tannery. More than a social arm of Fuga SA, the Foundation represents the continuation of a purpose: to grow together with the region and contribute to the human and inclusive prosperity of the local community.”

The reports featured in the Stories That Inspire section are not necessarily related to the data collected and presented in this publication.

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*The writing of this document was produced entirely
without the use of artificial intelligence tools.*

Published in March 2026.

Talking about leather
is talking about Brazil