Uruguayan
WOOL

A quality product for conscious consumers.

Uruguay

Driven by a rich heritage of fertile land, with optimal environmental conditions, Uruguay has excellent natural attributes for sheep breeding and production. There, flocks graze freely under the open sky throughout the year, producing high quality wools that are exported to more than 40 countries mainly in different forms (greasy, scoured and combed as tops).

During 2024 and 2025, Uruguay's wool exports showed a clear distribution across processing levels: greasy wool accounted for 47% of total exports, combed wool 30%, and washed wool 23%. Each wool type was directed to distinct markets. Greasy wool was mainly exported to China as a key destination but also to Egypt, Bulgaria, India, and Italy. Washed wool went primarily to China, India, Egypt, Mexico, and Italy, indicating demand from both established and emerging markets. Combed wool, the most processed type, was mostly shipped to Italy, Germany, Turkey, China, and Poland — countries known for their textile and fashion industries. This export pattern highlights Uruguay's integration into various stages of the global wool value chain.

These South American lands have a long history of specialized work with wool fiber, adding modern and cutting-edge technological and production processes and a strong commitment in terms of social inclusion and national identity.

Livestock production systems in Uruguay are extensive and open range throughout the year, mainly on natural pastures, with sheep and beef cattle grazing together in a mutually complementary manner. In this way, it contributes to animal welfare, soil and pasture quality, weed control and generating more work for producing families.

Uruguayan wool offers excellent quality with attributes that set it apart from the rest of the world's wools and that position the country as a solid partner for the development of the sustainable fashion and design industry, both nationally and internationally. Producing a range of fine and mid-micron fibre diameter, Uruguayan wool have remarkable fibre length and strength, high scouring yield and low vegetable matter content.

Wool is a **natural**, **renewable** and **recyclable product, and in Uruguay it is produced in a sustainable** manner, with processes and products that are **environmentally friendly and, many times, with the certification to prove it.**

This high-quality fiber enables the creation of light fabrics with unique properties. Its thermoregulating quality, which outperforms other natural and synthetic fibers, offers a better balance between body and environmental temperature, as well as providing a comforting feeling to the skin. This makes it an ideal fiber for year-round garments.

Hand-knitted and hand-embroidered 100% wool sweater. The Farra

ONE OF THE FEW

100% natural

FIBERS

Sheep produce new fleece each year, which makes wool a completely **renewable** fiber. Its natural and sustainable production **contributes to carbon sequestration in the environment**. In fact, half of the weight of wool is sequestered carbon[1].

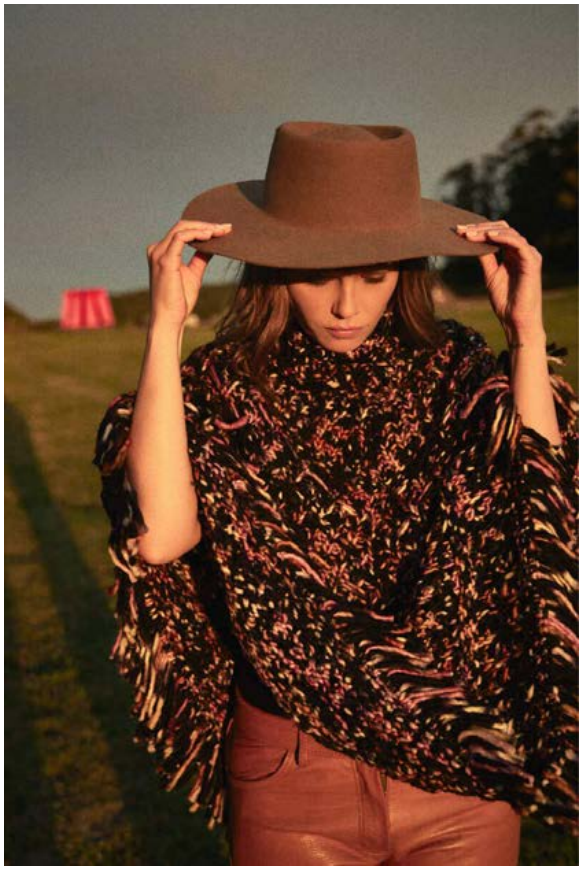
When we obtain wool from sheep, the fibers harbor a significant amount of organic carbon derived from the growth process of these animals. This carbon has its origin in the carbon dioxide (CO2) present in the air, which is absorbed through photosynthesis by the grass which sheep then eat. As the sheep ingest these plants, carbon is absorbed into their tissues, including the growth of wool on their bodies.

[1] *Compiled by Uruguay XXI based on Ovinos SUL magazine, April 2022. "The sheep industry in Uruguay: Tradition, innovation and opportunities".*

Unlike man-made fibers, wool **does not release micro-particulate pollutants** into waterways when the garments are washed. In addition, wool fabrics are very resistant and have a long-life span, so they are widely **recycled and reused**.

Wool is one of the most versatile natural fabrics available in the industry, not only because of its low environmental impact, but also due to its wide variety of uses: from luxury fashion to high-end automobile and aircraft interiors, baby clothing, sportswear, footwear, high-performance outerwear, by-products for the cosmetic industry and much more.

Rustic wool loom-woven bag
South Wool



Poncho - Manos del Uruguay

MAIN ATTRIBUTES OF WOOL IN TEXTILE USE

breathable

Easily absorbs moisture particles and wicks them away so they evaporate into the air.

soft on the skin

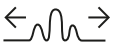
Merino wool is one of the finest natural fibers and therefore one of the softest.

insulating

It is an active fiber that reacts to weather to keep the body cool when it is hot and warm when temperatures drop.

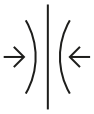
water repellent

It has a top layer of natural wax, lanolin, which makes it water repellent.



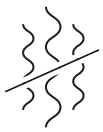
smart crease

Merino wool fibers return to its natural shape after being stretched or folded. It is wrinkle resistant.



naturally elastic

The fibers of the wool yarns are bonded together and give the wool strength and elasticity.



odor resistant

It can absorb odor particles and retain them, releasing them only when garments are exposed to the sun.

Slow fashion seeks long-term sustainable production in order to achieve long-lasting and high-quality products, that are included into a value chain with ethical principles and dignified working conditions.

In this context of trends moving towards conscious consumption, the production of natural and sustainable fibers is becoming increasingly attractive, and wool takes center stage.

As a producer of natural fibers, Uruguay is a reliable supplier in this industry that seeks to close the current gap between supply of sustainable goods and the growing demand of conscious consumers.

Collared poncho - Don Baez

Wool blanket - Hilustrada

URUGUAY MERGES

tradition, innovation

AND A SOLID

institutional framework

Uruguay has a long tradition of working with wool fiber and specific *know-how*. The blending experience of the Uruguayan combing industry has allowed for the development of skills to manufacture different types of products and qualities to supply even the most demanding and sophisticated customers.

For decades wool was the country's main export item and the basis of its textile industry, which led to the development of a strong institutional framework that actively promotes innovation, development, research, training and technology transfer between producers, technicians, industry representatives and national scientific and technological organizations.

Research and Experimentation center
Dr. Alejandro Gallinal - Uruguayan Wool Secretariat

Uruguay's Guide for the Ethical Production of Sheep is an important step towards the protection of animal welfare in livestock production. **Uruguay is the first country in South America to draft its own guide** based on the compliance of the five freedoms.

Many Uruguayan producers in the sector have their wool clip with certifications that consider animal welfare issues and add environmental aspects such as the protection of soils, pastures and its biodiversity, and social aspects such as decent labor conditions for workers. Work is being carried out both at the institutional level and in the industry to encourage more producers to join these standards and certifications (example is Responsible Wool Standard and Origen).

The establishments must comply with certain sustainability standards in order to receive the certification of their wool production. The presence of organic wool certification is noteworthy, it is issued by Global Organic Textile Standard (GOTS), and this certification ensures that companies comply with certain standards such as using responsible environmental management practices, protecting the health and safety of the workers and promoting ethical and fair practices in the supply chain.

Uruguayan shearers are recognized for their talent and methodology, standing out for their precision, animal care, and efficiency in maximizing the amount of wool they can shear in a day's work. Each year some 300 shearers travel overseas (mainly to Spain and US) to perform this seasonal work. **The Uruguayan shearers master the "Tally Hi" method of untethered shearing, which emphasizes animal welfare** and results in a better quality fleece, obtained by an untethered animal, thus avoiding stress and pain for the sheep. **It is important to note that in Uruguay the Mulesing[3] practice is not needed so all the wool production is Mulesing free.**

[3]Mulesing is a surgery that removes the skin around a lamb's anus, to prevent the attack of a specific fly to that area. The name of this practice derives from the inventor of the technique, John Mules. It is carried out in Australia. (this practice is not performed in Uruguay). See link.

If needed, Uruguay can offer lot-level traceability for sheep production, with means that the wool can be traced back to its origin on a specific property[4]. **Showing commitment to transparency in the supply chain, offering reliability and a warranty for external markets.**

Information related to the **harvesting and preparation** of wool at the time of shearing is **digitized** and can be viewed in **real time**, thanks to SIRO, a powerful tool[6] developed locally to be used by producers, which allows access to information on shearing and preparation of the wool.

It is thanks to the combined efforts of the private sector and public institutions, which actively support and finance these projects, that technology was finally able to break into the wool industry. Uruguay also has a local certification system agreed upon between the Uruguayan Wool Secretariat (SUL, for its acronym in Spanish) and wool operators, which ensures that the wool obtained with the "normas de acondicionamiento" Green label wool protocol is free from contaminants and it classifies the types of wool produced.

[4] For more information on the traceability system in place in Uruguay, visit this link.
[5] Law 17,997. For more information on the traceability system in place in Uruguay, visit this link.
[6] Learn more about the tool called SIRO.

In line with the global trend towards sustainability in the fashion ecosystem, Uruguayan fine wool made its way into the garments of the Italian brand Gucci.

The partnership was struck between Gucci and Nativa Precious Fiber[7], part of the French group Chargeurs. Nativa is based in Uruguay and specializes in the supply of sustainable wool and the certification of the production chain for fashion brands committed to reducing their environmental impact. This alliance aims to enable the clothing company to use at least 50 tons of Uruguayan Nativa wool for the manufacture of its luxury garments.

Another key player in this project was the National Institute of Agricultural Research (INIA, for its acronym in Spanish), as it was responsible for carrying out the analysis of the regenerative production, as well as the measurements of biodiversity and soil nutrient levels[8].

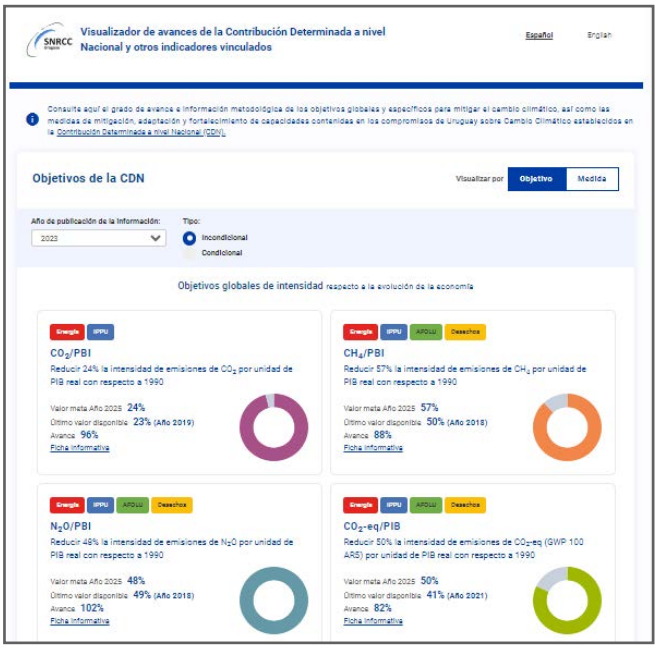
The agreement between Gucci and Nativa, together with the Uruguayan combing company Lanas Trinidad aims to improve the soil quality and foster greater biodiversity on Uruguayan ranches, while also helping brands reduce their carbon footprint and achieve their sustainability goals.

[7] Nativa Precious Fiber: Certification from the Chargeurs Luxury Materials conglomerate, covering aspects related to animal welfare, environmental care and corporate social responsibility uses Blockchain for traceability from sheep to finished garments.
[8] The Ecosystem Integrity Index is a tool designed for environmental assessment that reveals the conditions of a given property and its evolution over time. This index follows the global principles of regenerative livestock farming,but is tailor-made for Uruguay because it includes important indicators in the local context as well. To learn more about IIE (for its acronym in Spanish) click here.

Hand-knitted throw in thick ivory merino wool weave - Texturable

An agro-intelligent

COUNTRY AT THE FOREFRONT OF COMMITMENT TO SUSTAINABILITY



Uruguay shows a strong commitment to environmental sustainability at the international level. In October 2022, the country issued a bond related to environmental indicators such as the reduction of greenhouse gas emissions and the preservation of its native vegetation. This innovative strategy connects its debt to its environmental performance, fostering compliance with environmental commitments to reduce climate impact. Furthermore, to show its endorsement to the Paris Agreement, Uruguay has developed a digital tool that displays its progress in regard to global climate change mitigation objectives. This tool provides transparency to the public of the country's contribution together with other key indicators. Access the platform **here**.

Currently the country is working on a **climate-smart livestock** strategy, focused on efficient production regarding greenhouse gas (GHG) emissions, climate change mitigation and fulfilling the carbon sequestration potential of grassland soils. An example of this is the extensive joint grazing of cattle and sheep, which is very positive for the conservation of native grasslands, contributing to biodiversity and to carbon sequestration.

Uruguay is at the forefront of the international energy sector: the country has already completed a first energy transition **-95% of its electricity is obtained through renewable sources-** and it is already working on the second transition that consists of decarbonizing the rest of the energy matrix. Several wool producers make their own renewable energy, which they then use for their production and then feed it into the electricity grid, either through wind energy or thermal energy based on biomass.

Windmills and rainwater reserves - Engraw

WOOL PRODUCTION

sustainable

The Uruguayan wool industry is seriously committed to caring for the environment. The treatment of effluents and the use of biodegradable products in the wool scouring processes ensure sustainable production, and the wool industry in Uruguay is a leader in the use of clean, renewable energy sources. This is set in the statement of the International Wool Textile Organization (IWTO), an international entity that represents the interests of the wool trade and wool textile industry worldwide, of which Uruguay has been a member since its inception in 1930.

Labor rights

IN URUGUAY

Uruguay has the best labor conditions of the region and leads labor formality indexes in Latin America. The goods and services that are offered include an ethical dimension in its processes, that contributes to decent working conditions and access to opportunities. The sheep production chain and the wool sector in particular contribute to the fulfillment of the **Sustainable Development Goals (SDGs)** promoted by the United Nations[9].

A relevant aspect of the sheep industry is that it encourages the population to settle in rural areas due to the nature of the work. This type of production can be found in different areas of the country, promoting labor in different parts of Uruguay.

[9] *For more information, click on this link.*

In turn, Uruguay has targeted programs like Specific Ovine Territorial Interventions, which consist of plans to build producer capacities with an impact on identifying job opportunities, improvements in family income and rural women's empowerment in production processes, among other things[10].

In the textile sector, cooperatives and family businesses such as Manos del Uruguay, one of the leaders in the industry, stand out for enabling many women to reach personal and financial development and independence, whilst remaining in their communities. This is also a social space for cooperation and appreciation of national handicraft productions and the strengthening of cultural identities.

Manos del Uruguay has been a member of the **World Fair Trade Organization – WFTO** since 2009.

Uruguayan weavers from Manos del Uruguay at Bergdorf Goodman as part of the Artisans in Residence project led by Gabriela Hearst.

Carrie Bradshaw (Sarah Jessica Parker) in a scene from the series And Just Like That, wearing a Stella McCartney sweater and a multicolored cashmere blanket designed by Gabriela Hearst and knitted by Manos del Uruguay.

[10] *For more information, visit this link.*

Hand-knitted Merino and Corriedale wool - Ound

100% Wool pants - Ana Livni

URUGUAY AS A

world supplier

OF SUSTAINABLE WOOL

Uruguay Wools

VISIT THE WEB SITE **HERE**

Uruguayan wool is internationally recognized for its origin and the way it is produced, which meticulously considers genetics, breeding, shearing and clip preparation protocol, and which, together with cutting-edge technology and the completely renewable electricity matrix in Uruguay, render the country a sustainable producer of quality wool. Thus, Uruguayan wools are in high demand amongst the most demanding luxury seeking customers.

In order to strengthen the sector, boost its internationalization and solidify the country's opportunity to establish itself as a benchmark in the wool industry, both regionally and globally, the brand Uruguay Wools was created, which synthesizes the value proposal in the claim "pure natural mystic" and sets itself apart for its attributes of innovation, glocal (global + local) profile, design quality, natural origin and clarity.

The development of Uruguay Wools is part of the Uruguayan country brand strategy within the framework of the agency for promotion of investments and exports, Uruguay XXI.

Uruguay is the world's fourth-largest exporter of greasy wool, fourth in washed wool, and fifth in wool tops. In 2024, total exports from the sector reached USD 138 million, representing an 18% increase compared to 2023.

Destinations vary depending on the degree of processing. In the case of greasy wool, exports totaled USD 57 million, with 85% shipped to China, followed by Bulgaria (8%) and Italy (5%). Washed wool accounted for USD 23 million, with China (57%), India (12%), and Egypt (8%) as the main buyers. As for wool tops, exports reached USD 57 million, with Italy (26%), Germany (21%), and China (11%) as the primary destinations.

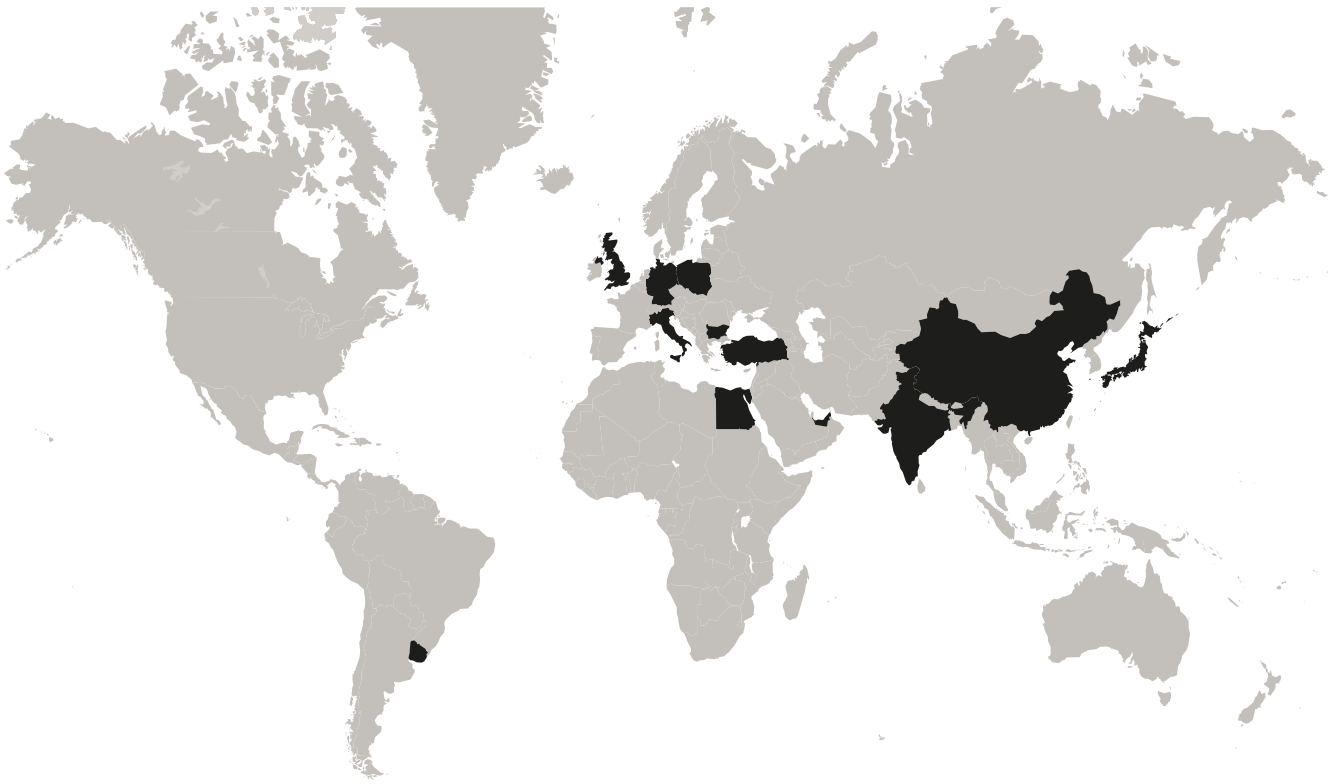
100% Merino Sheep Wool - Organic Cotton

[11] See article **here**.

Within **Europe, Germany, Italy, Turkey, Bulgaria, Poland and the United Kingdom** stand out.

Asia is a close second, and as a continent it represents 36% of wool purchases. **China** is the main market, followed by **India** and **Japan**.

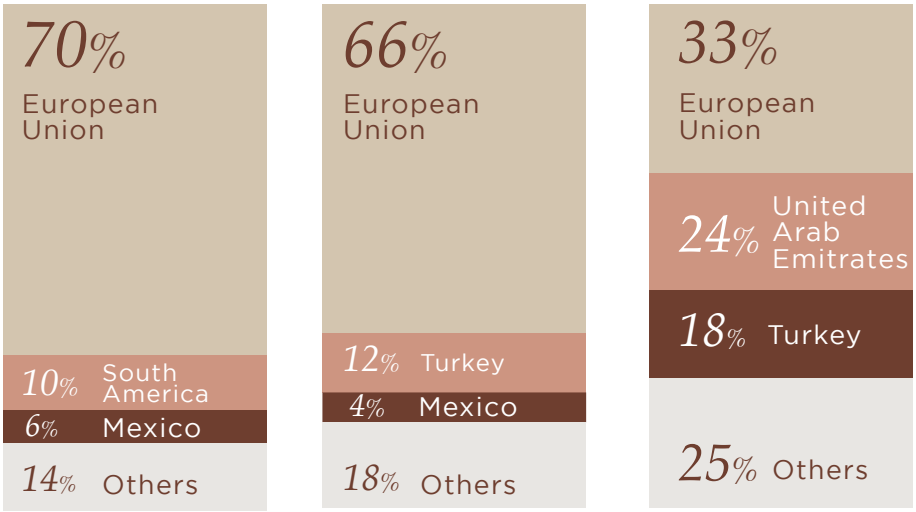
The sales to the following countries are also relevant: **Egypt** and **United Arab Emirates**, both recognized world producers of high-quality carpets and rugs.



WOOL MICRONAGE AND THEIR EXPORTS AND USES

TYPE OF WOOL	SUPER FINE AND FINE	INTERMEDIATE	THICK
SHARE (%) EXPORT	40%	50%	10%
MAIN USES	high-end fashion	sweaters, overcoats and garments in general.	rugs and automobile and aircraft interiors

MAIN MARKETS



SOME

uruguayan brands

LIVNI

CARDAN CABOS

Don Baez
BY MONTELAN EST. 1959

ESTANCIA MENDOZA

Hilustrada

LA PASIONARIA
universo creativo

MANOS DEL URUGUAY
EST. 1968

NIDO

ound

malabrigo

Ruralanas

the farra

SATORI

texturable

Uruguay

For more information on wool production in Uruguay, the main players and characteristics, please see the **SECTOR REPORT COMPILED BY URUGUAY XXI**.

DISCOVER MORE ABOUT URUGUAYAN FASHION AND WOOL VISITING THE FOLLOWING LINKS:

AUDIOVISUAL:

▶ URUGUAYAN WOOL AT EXPO OSAKA

▶ URUGUAY'S FASHION TRIP

EDITORIAL:

URUGUAY FASHION CATALOGUE

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