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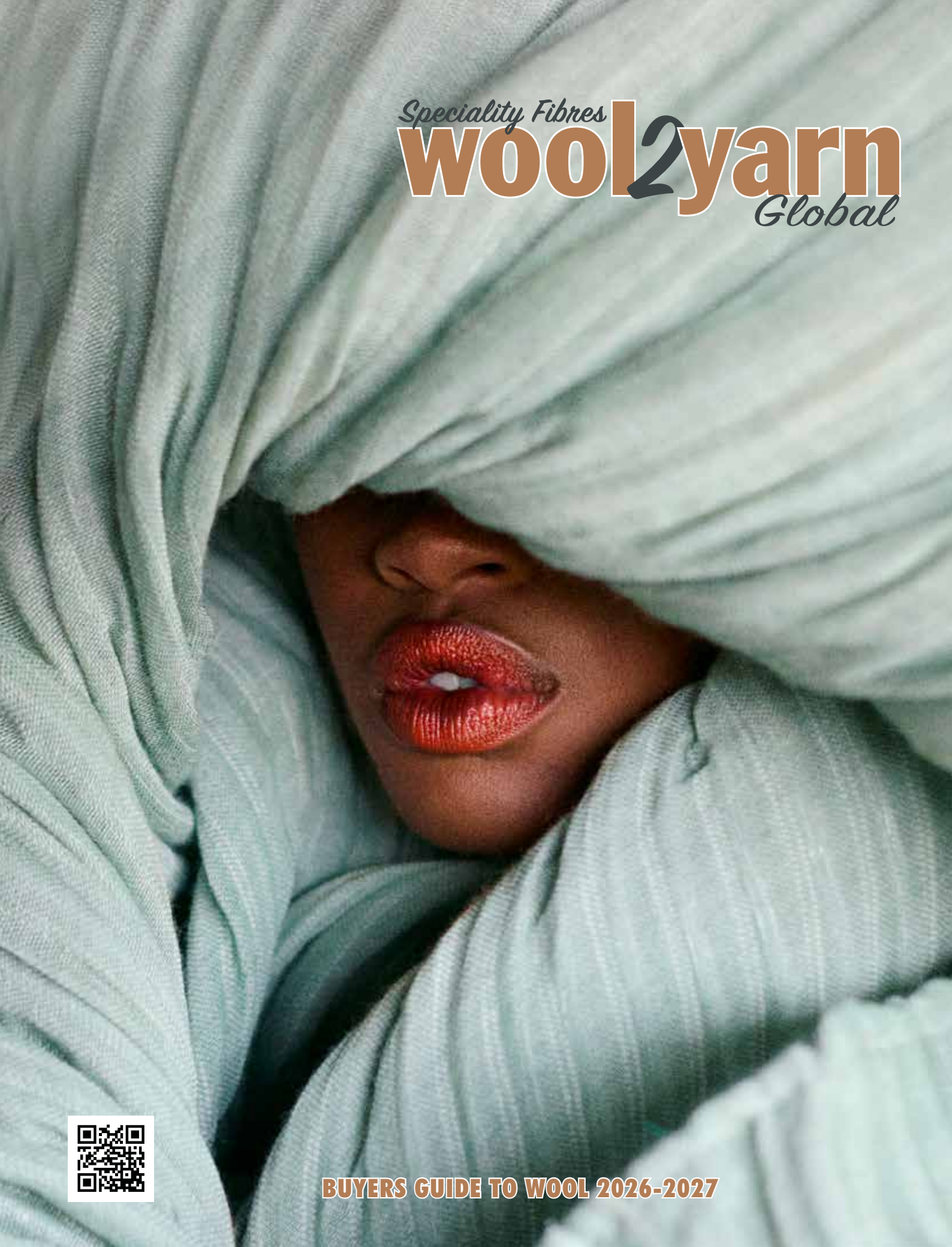
wool2yarn Global



BUYERS GUIDE TO WOOL 2026-2027

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Welcome to the 2026 Edition



Victor Chesky
Editor

The mood across the international wool industry is noticeably brighter than it was a year ago. Delegates at the IWTO Congress 2026 reported renewed optimism, supported by stronger wool prices, improved enquiry levels and healthier order books. After several difficult years, the industry appears to have regained momentum.

Whether this translates into stronger retail sales and sustained consumer demand through the 2026/27 season remains uncertain. Brands and manufacturers continue to navigate cautious consumer spending, shifting trade policies and geopolitical uncertainty. The coming year will reveal whether this is the beginning of a lasting recovery or simply a temporary lift in confidence.

Against this backdrop, this year's edition of *wool2yarn global* focuses on Asia, where many of the industry's greatest opportunities are emerging.

Our special regional reports examine Bangladesh, India, Nepal and Turkey. Bangladesh continues its move into higher-value textiles, India remains one of the world's largest and most diverse wool markets, Nepal is gaining recognition for premium wool and cashmere products, and Turkey is strengthening its position as a major supplier of wool products to European and global markets.

We also continue our special report on the cashmere sector with Part Two of our Mongolia and China feature, exploring how government policies and investment are reshaping fibre production, processing and international trade.

This edition also features the latest developments in wool, mohair, cashmere, yak and other speciality fibres, together with updates from major wool-producing countries and insights from exporters, processors and manufacturers across the global supply chain.

As always, *wool2yarn global* remains committed to connecting the international wool community by providing reliable market intelligence, technical information and valuable industry contacts.

We thank all contributors, advertisers and supporters whose continued commitment makes this publication possible, and we hope you find this edition both informative and valuable throughout the year.

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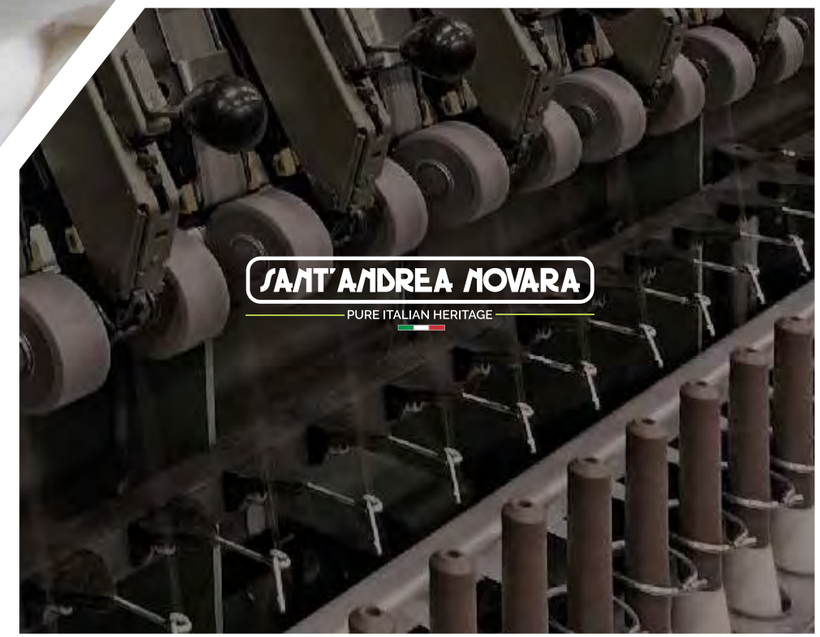

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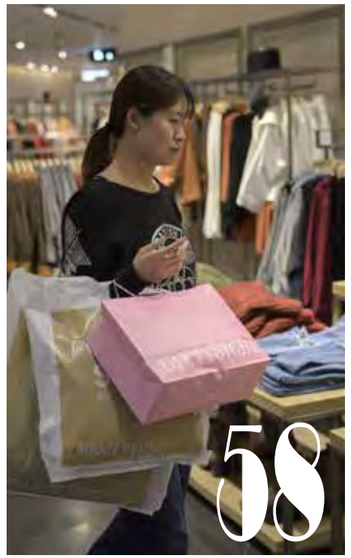

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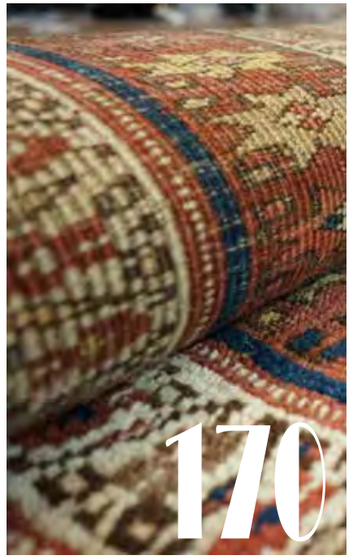

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GLOBAL WOOL PRODUCTION

The global wool industry entered 2025/26 with supply remaining tight and little evidence of any significant increase in production over the medium term. Most major producing countries continue to operate with historically low sheep numbers, limiting the availability of both fine Merino and broader crossbred wool.

For manufacturers and brands, constrained supply reinforces the importance of securing reliable sourcing relationships and investing in traceable supply chains. At the same time, demand for premium natural fibres is being supported by sustainability goals, technical innovation and growing consumer appreciation of wool's performance credentials.

While global production is unlikely to return to previous highs in the near future, the combination of limited supply and steady demand positions wool as an increasingly valuable fibre within the international textile industry.

Australia remains the world's largest producer and exporter of fine Merino apparel wool, accounting for around 70% of global apparel wool exports. The Australian Wool Production Forecasting Committee's (AWPFC) first forecast of shorn wool production for the 2026/27 season is 243.9 million kilograms (Mkg) greasy. This is 4.5% lower than the 2025/26 fourth forecast.

Average fibre diameter continues to trend finer, with Australian Merino wool maintaining its reputation as the premium fibre for luxury apparel. Major export markets include China, which buys over 86% of the Australian wool clip, followed by India, Italy, the Czech Republic, and more recently Vietnam. Over 96% of the Australian wool clip is exported greasy. The largest micron category of Australian wool by volume is 19 micron (41.3 Mkg greasy) followed by 18 micron (39.1 Mkg greasy) and 20 micron (26.1 Mkg greasy).

South Africa's estimated production: 42-43 Mkg greasy, fibre diameter averaging 19.6 microns, yield at 62.3%, and vegetable matter (VM) content averaging 1.3% across all wool types. Merino continued to dominate offerings, accounting for 68% of the total wool presented.

The industry exports more than 90% of its wool production greasy, with China accounting for the overwhelming majority of purchases. South African wool has a reputation for quality, particularly in fine apparel applications. Over 50% of its clip is RWS or certified under Sustainable Cape Wools Standard. (See more on pages 140).

New Zealand is the world's largest producer of strong crossbred wool used in carpets, interiors, insulation and technical textiles. Its estimated production is approximately 110 Mkg greasy. The national sheep flock continues its long-term decline, falling to approximately 23.6 million sheep, the lowest level for many decades. While demand for traditional carpet wool has softened over recent years, increasing opportunities are emerging in acoustic products, building insulation, premium interiors, sustainable construction materials, and biodegradable products. China remains New Zealand's largest wool export destination, followed by India and Europe.

Uruguay wool exports during the 2025/26 season (July 2025 to June 2026), were 43.1 Mkg of wool on a greasy equivalent basis, up 2.9% on the previous season. Greasy wool accounted for 41% of exports, followed by scoured wool (33%) and wool tops (26%). Uruguay exported 17.5 Mkg of greasy wool worth USD81.6 million, a 52.8% increase in value over the previous season. China dominated purchases, accounting for 92.9% of export value, followed by Italy (4.7%). Exports of scoured wool totalled 7.7 Mkg, with the main markets being China (72.5%), India (13.4%) and Egypt (6.9%). Wool tops from Uruguay was 9 Mkg. The leading destinations were Italy (28.2%), Germany (19.3%), China (9.4%), Turkey (6.9%), and Mexico (5.1%). (See more on Uruguay wool on pages 150).

Argentina's wool production is currently estimated at around 34,000 metric tons greasy basis. Patagonia continues to be the biggest wool producing region representing over 55% of the sheep population. Approximately 8,000 tons, or about 25%, is exported as greasy wool and destined for top-making mills in China, with other key markets including India, Italy, and Germany. Around 64% of the clip is finer wools, 24 microns and finer. Medium micron wool 24-32 microns accounts for 24%.

Peru produces more than 10 Mkg of sheep wool annually from a flock of around 12 million sheep. Production is concentrated in the Andean

highlands and supports thousands of small farming communities. Peruvian wool is used both domestically and in export markets alongside the country's internationally recognised alpaca fibre industry. (See more on Peruvian wool on pages 148).

The **United Kingdom** produces mainly strong and medium crossbred wool through British Wool's national collection system. The others are 25/26 clip delivered the strongest producer returns in more than a decade. Average grower payments reached around 68 pence/kilogram, compared with approximately 40 pence/kg the previous year.



"While the recovery of the Australian wool industry has been gradual, the sector has made significant progress in areas that matter most to wool buyers worldwide. The growth of the Australian Wool Sustainability Scheme (AWSS), the Australian Wool Traceability Hub, e-speci and RFID are providing the transparency, provenance and assurance increasingly sought by brands and retailers. These initiatives further strengthen Australia's position as a trusted supplier of responsibly produced, high-quality wool"

Josh Lamb, President
Australian Council of Wool Exporters and Processors

Improved prices reflected stronger international demand for coarse wool after several difficult seasons. (See more on UK wool on pages 154).

USA produces approximately 22 million pounds of shorn wool annually, with a national flock of about 3.2 million head. Leading production states include California, Wyoming, Colorado, Utah, and South Dakota. California alone accounts for over 10% of the national wool clip. Roughly 60% of American wool is exported, reaching key markets like China, Italy, Egypt, Bulgaria, and the Czech Republic. The remaining 40% is used domestically, much of it by the US military, which sources American wool for uniforms, socks, and blankets due to its durability and performance.

China is the world's largest wool processor and importer rather than a major exporter of raw wool. Domestic greasy wool production is estimated at approximately 170-180 Mkg, although much of China's clip is medium and broader wool for domestic consumption.

However, Chinese mills continue to rely heavily on imported Merino wool from Australia and South Africa to satisfy demand for high-quality apparel for export and domestic markets. China processes more than half of the world's apparel wool and continues to be the largest buyers of Australian wool.

According to China Customs, imports of raw wool and wool products totalled US$1.71 billion (RMB 11.87 billion), up 26.65%. Raw wool and early-stage processed wool imports reached US$1.1 billion, up 24.04%, while import volumes remained almost unchanged at approximately 130,000 tonnes.

Exports of wool textiles and products reached US$4.35 billion, up 2.29%, although the value in RMB terms declined 1.01% to RMB 30.23 billion due to exchange rate movements. Exports of products containing pure wool or more than 50% wool blends increased 5.11%, while cashmere product exports rose 6.97%. Exports to India surged 40.19% to US$76 million and to Turkey 24.89% to US$42.46 million. See more on China wool industry on pages 106).

NEW TESTING OFFERS

Fresh Insight into Wool Carpet Performance

Across the contract interiors sector, nylon has long been considered an important ingredient in achieving the performance standards required for heavy commercial Axminster carpets. Recent independent testing, carried out by BTTG and published through the International Wool Textile Organisation, offers a fresh perspective on that long-held view.



The study compared two like-for-like Axminster carpet samples: one with a 100% wool pile and one with an 80% wool/20% nylon pile. Both were tested across a series of recognised performance measures, including appearance retention, fibre shedding, abrasion resistance and soiling.

The headline finding is straightforward, and important. Both carpets achieved Class 33 Heavy Commercial Use classification. In other words, the 100% wool carpet met the same heavy commercial performance standard as the wool/nylon blend.

For strong wool-producing countries, and for the wider wool interiors sector, that matters. It gives designers, architects, specifiers and manufacturers a stronger evidence base when considering wool for demanding environments, such as hotels, offices, public buildings and other high-traffic spaces.

The appearance retention results were particularly significant. In the Hexapod test, which looks at how a carpet retains its appearance after repeated use, both samples recorded the same ratings at 4,000, 12,000 and 24,000 test cycles. That is the kind of result that helps move the conversation beyond perception and into evidence.

The work also comes at a time when the specification market is under growing pressure to consider more than performance alone. Sustainability, recyclability, indoor air quality and end-of-life impacts are now part of the discussion in a way they were not a generation ago.

Blended fibres can create additional challenges when products reach the end of their life, particularly where different fibre types need to be separated or recycled.

This does not mean every carpet specification is simple, or that one construction answers every brief. But it does challenge the idea that adding nylon to the pile is automatically required for durability in heavy commercial Axminster carpets.

For a natural fibre that is renewable, durable and already strongly associated with quality interiors, that is a valuable message. It gives the wool industry more confidence to talk not just about the environmental case for wool, but also about its proven technical performance.

Carol Sebert, Chairperson of the IWTO Interiors Committee, said:

"This project was about testing a long-held assumption and allowing the evidence to speak for itself. The results show that 100% wool Axminster carpets can deliver the performance required for heavy commercial interiors without adding nylon to the pile. That gives specifiers greater confidence to choose wool where performance, provenance and sustainability all matter."

The findings form part of a wider effort by the IWTO Interiors Group to build a stronger, evidence-led case for wool in interior applications.



PIVOTING MARKETS

Create New Opportunities for Wool

New investment in textile manufacturing, shifting sourcing strategies and expanding consumer markets are creating fresh opportunities for Australian wool beyond its traditional destinations. While China remains central to the global wool trade, countries including India, Vietnam, Bangladesh and Türkiye are strengthening their role as processors of premium wool, while emerging consumer markets across Asia and the Middle East are supporting longer-term demand growth.

China remains the dominant destination for Australian wool, processing more than 80% of the world's wool directly or indirectly. However, investment in textile manufacturing is accelerating elsewhere as governments, manufacturers and global brands diversify production networks and expand capacity for premium natural fibres. These structural shifts are creating new pathways for Australian wool throughout the global supply chain.

For woolgrowers, exporters and processors, these emerging and pivoting markets provide an opportunity to diversify demand, reduce reliance on a single destination and establish new long-term supply relationships. At the same time, global apparel brands are reshaping their sourcing strategies by expanding manufacturing across multiple countries, creating new pathways for wool fibre to enter international supply chains.

India Accelerates as a Wool Processing Hub

India is rapidly positioning itself as a major processing hub for premium wool. Already the second-largest destination for Australian and New Zealand greasy wool exports by volume, India continues to invest heavily in textile manufacturing as part of its ambition to become a global apparel production powerhouse.

Government initiatives, such as the Production Linked Incentive (PLI) Scheme and the PM MITRA textile park program, are attracting investment in modern textile infrastructure, spinning, weaving and garment manufacturing. These developments are strengthening India's capacity to process wool into high-value fabrics, apparel and home textiles.

India also benefits from one of the world's fastest-growing middle-class consumer markets. Demand for premium menswear, business clothing, uniforms, knitwear and luxury fashion is steadily increasing as disposable incomes rise and consumers seek higher-quality natural fibres.

The Wool & Woollens Export Promotion Council (WWEPC), operating under India's Ministry of Textiles, has set an ambitious target to double woollen exports to US$2.5 billion by the 2029/30 financial year. Achieving this objective will require increased access to premium raw materials, positioning Australian wool fibre favourably due to its consistent quality, traceability and reputation for producing lightweight, comfortable garments suited to both domestic and export markets. (For more information, see India Report p 182)

Vietnam Expands Premium Wool Manufacturing

Vietnam has become one of Asia's fastest-growing apparel manufacturing centres and is increasingly expanding into premium wool apparel for international brands.

The country's extensive network of free trade agreements, competitive manufacturing costs and growing investment in textile technology make Vietnam an increasingly attractive location for wool garment production.

As global apparel companies diversify their supply chains beyond a single manufacturing country, Vietnam is expected to play a larger role in processing Merino wool into premium-quality yarn and garments destined for Europe, North America and Asia.

International investment reflects this confidence. The Südwolle Group, one of the world's largest manufacturers of worsted wool yarns, has established Vietnam as a key component of its global production network through Südwolle Vietnam Co.

Similarly, China's Xinao Group—the world's largest worsted spinning company—opened a dedicated Merino wool spinning facility in Vietnam in 2024, with plans to produce around 6,500 tonnes of worsted yarn annually by 2027. These investments demonstrate growing confidence in Vietnam's ability to become an important processing hub for fine wool.

Bangladesh Moves Beyond Basic Apparel

Bangladesh is best known as one of the world's largest garment exporters, but manufacturers are increasingly expanding into higher-value products, including wool-blend knitwear and tailored garments.

Knitwear accounts for almost 47% of Bangladesh's Ready-Made Garment (RMG) export earnings, with sweaters, including wool garments, generating an estimated US$6–8 billion annually. While wool currently represents only a small share of this market, exports of woollen garments are estimated at around US$100 million a year and are expected to grow as manufacturers expand into higher-value fibre categories.

Recognising this opportunity, Australian wool industry representatives recently visited Bangladesh to demonstrate how Merino wool can be successfully integrated into the country's established garment manufacturing sector.

A technical workshop led by Melbourne's Deakin University's Institute for Frontier Materials showcased eqwools™, an Australian innovation that enables 100% Merino wool to be spun using conventional cotton spinning systems. The technology allows Bangladeshi mills to process Merino wool without significant capital investment, providing a practical pathway to manufacture premium wool garments using existing equipment. (For more on Bangladesh, see p 178)

Türkiye Strengthens Premium Textile Production

Türkiye continues to play an important role in global premium textile manufacturing. Domestic wool production cannot meet the requirements of Türkiye's sophisticated textile industry, making the country a significant importer of raw wool.

Australia remains one of Türkiye's leading suppliers of premium Merino wool, particularly for worsted spinning used in luxury knitwear, suiting and woven fabrics. Depending on market conditions, Türkiye imports approximately 40,000 to 60,000 tonnes of greasy and semi-processed wool annually, with volumes varying according to global demand, exchange rates and textile orders.

Türkiye's vertically integrated textile industry enables wool to be processed from fibre through to finished garments, allowing manufacturers to process wool from fibre to finished garment with high levels of quality control, flexibility and relatively short lead times.

Its textile mills have earned a strong reputation for producing premium suiting, knitwear and luxury fabrics supplied to leading European fashion brands. As more brands adopt near-shoring strategies to improve supply chain resilience and shorten delivery times, Türkiye is well positioned to strengthen its role as one of Europe's preferred manufacturing partners while maintaining strong demand for wool fibre. (For more on Türkiye, see p 170)

Emerging Consumer Markets

Beyond manufacturing, Southeast Asia is becoming an increasingly important consumer market for wool apparel.

Countries including Indonesia, Thailand, Malaysia, Vietnam and the Philippines are experiencing rising disposable incomes, expanding middle-class populations and growing interest in premium international fashion brands featuring natural fibres.

Merino wool is well-suited to tropical and subtropical climates thanks to its natural moisture management, breathability, odour resistance and ability to regulate body temperature. Lightweight performance apparel, travel clothing, business wear and fine knitwear are becoming increasingly popular among younger, affluent consumers seeking versatile, premium garments.

Although current wool consumption remains modest compared with more established markets, the region's population of more than 680 million people presents significant long-term growth potential.

The Middle East is also becoming an increasingly important market for premium wool. The United Arab Emirates, Saudi Arabia and Qatar continue to invest heavily in luxury retail, tourism and international fashion, supporting demand for high-quality tailoring, knitwear and fine fabrics. Affluent consumers are placing greater value on natural fibres with strong sustainability credentials, while Merino wool's natural temperature regulation makes it well suited to the region's heavily air-conditioned indoor environments.

At the same time, sustainability is reshaping textile markets worldwide. Governments are encouraging circular manufacturing and renewable fibres, while global fashion brands are setting ambitious environmental targets that favour biodegradable natural materials over synthetic alternatives. These trends align closely with Australian Merino wool's renewable, recyclable and traceable credentials.

Geopolitical uncertainty and supply chain disruptions are also prompting manufacturers to diversify production beyond a single processing country. As textile manufacturing expands across India, Vietnam, Bangladesh and Türkiye, demand for premium Merino wool is becoming increasingly diversified.

A More Diverse Global Wool Market

China will remain the cornerstone of the global wool trade for the foreseeable future. However, investment in new manufacturing hubs and growing consumer demand across multiple regions are reshaping the industry's growth trajectory.

At the same time, sustainability policies, circular economy initiatives and growing interest in renewable materials are encouraging many brands to broaden their use of natural fibres. Together with increasingly diversified manufacturing networks, these trends are creating new pathways for Australian Merino wool throughout the global supply chain. Together, these shifts suggest the future growth of Australian Merino wool will be driven not by a single market, but by an increasingly diversified global ecosystem of manufacturers, brands and consumers.

For woolgrowers, exporters, processors and brands, a more geographically diverse market offers greater resilience, broader commercial opportunities and a stronger foundation for long-term demand.

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NEW SLEEP RESEARCH STRENGTHENS THE CASE FOR WOOL BEDDING

Research led by British Wool, working with the International Wool Textile Organisation (IWTO), gives the wool sector fresh evidence to support wool's role in sleep comfort, bedding performance and customer communications.

Wool has long been valued in bedding for its warmth, comfort and natural performance. However, in a market where brands, retailers and consumers increasingly expect clear evidence, the industry needs more than tradition to support its claims.

That was the focus of a 2025 research project led by British Wool, in partnership with the IWTO and Bangor University, with support from Welsh Government funding. The study compared wool-filled bedding with synthetic, feather and down alternatives, focusing on two areas central to sleep comfort: thermal performance and moisture management.

"We have always known that wool performs exceptionally well in bedding, but the industry needs credible, up-to-date evidence that helps explain why," says Graham Clark, Marketing Director at British Wool. "This research gives us a stronger platform to talk about wool not just as a natural fibre, but as a material that supports comfort through the night."

Evidence for industry and customers

The research was designed to reflect real-world consumer choice. Full-sized single duvets were selected from mainstream retail ranges and tested for insulation, heat movement and moisture transfer. The aim was to understand how wool performs beneath the duvet in the conditions that matter most to sleepers.

For the wool sector, the value of the work lies in translating wool's natural fibre properties into clear, usable messages. Wool is resilient, crimped and naturally able to absorb and release moisture vapour, helping bedding manage the microclimate around the body.

Thermal performance: challenging perceptions

In thermal testing, the wool-filled duvet outperformed the other fillings by between 17% and 30%. This is an important finding for brands and retailers because many customers still associate loft or bulk with warmth.

The research helps challenge that assumption. A wool duvet may be less lofty than a down or synthetic alternative, but the results show that warmth is not simply about volume; it is about how effectively the fibre manages heat.

"One of the barriers we often face with wool bedding is perception," Clark says. "People can associate loft with warmth, so a wool duvet may not always look the way they expect a warm duvet to look. The testing helps us explain that performance is not about bulk; it is about what the fibre is doing."

Moisture management: a clear comfort message

Moisture management is equally important. Under elevated temperature conditions, the wool bedding transmitted between 50% and 151% more moisture than the other fibres tested. It also moved moisture more quickly, with moisture transmission rates between 49% and 153% faster than competing fillings.

For customers, this gives wool a simple and credible message: it helps maintain warmth while also moving moisture away when the sleeper becomes too hot. That balance is central to bedding comfort and is highly relevant in a market increasingly shaped by wellness and performance claims.

"The moisture results are particularly important because they speak directly to comfort," Clark says. "People may not think about moisture vapour when they buy bedding, but they do recognise the feeling of being too hot or uncomfortable during the night. Wool helps us explain that comfort in a natural and credible way."

A shared opportunity for the wool sector

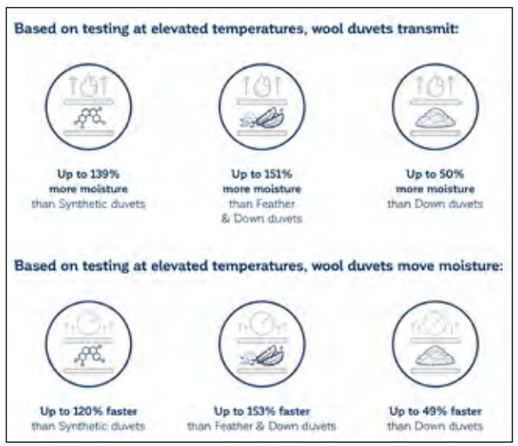
The findings have already been developed into an IWTO Wool & Sleep factsheet for use by members, giving the global industry a shared evidence base. British Wool is also using the research in consumer communications, trade engagement and international market development, with interest from markets including the UK, China and Japan.

For manufacturers, brands and retail partners, the opportunity is to make wool's benefits easier to communicate. Wool helps manage warmth. Wool helps move moisture. Wool helps support comfort. These messages are simple, but they are backed by evidence and relevant across international markets.

"For me, the strength of this work is that it turns wool's natural qualities into a story the whole industry can use," Clark says. "It gives brands, retailers and wool organisations a common language around sleep: temperature, moisture and comfort. Those are messages that travel well internationally."

From proof to demand

By bringing together British Wool, IWTO, Bangor University, Welsh Government support and industry expertise, the project has produced research that is both scientifically grounded and commercially useful. It gives the sector a stronger platform to position wool bedding as a natural, high-performing choice for sleep comfort — and a clearer route to turning evidence into demand.



WOOL'S FUTURE

Is a Story of Value, Not Volume



By Klaus Steger
President, International
Wool Textile Organisation

Standing on stage in Dalang, China, in June to open our 95th Congress, I said something I firmly believe. Wool is our work, and wool is our passion. It is this passion that unites the wool industry, even as it faces some challenging questions. In a world that is changing faster than ever, how do we keep wool relevant? How do we sustain trust in our fibre? How do we preserve its value?

The market data presented at Congress gives us some answers. After several brutal years, 2025 brought relief: merino prices finished the year up close to 40%, crossbred wool further still. But look beneath the surface, as our Market Intelligence Committee always urges us to, and the story is more sobering.

The price recovery we're experiencing is being driven by supply restraint, not demand growth. World clean wool production in 2025 is down ~5% year on year, and the global flock keeps shrinking. Meanwhile, total fibre production worldwide keeps climbing, almost entirely on the back of synthetics. Wool remains a small, and shrinking, share of a growing market.

I don't share that to be discouraging. I share it because it clarifies exactly what kind of industry we need to be. We are not going to win on volume. The only game that makes sense for wool is to compete on value. Quality, provenance, traceability, and sustainability credentials: these are where wool stands out. A case in point: certification premiums are recovering again after collapsing in 2023 and 2024. This is proof that the market will pay for wool it can believe in, provided we keep giving it reasons to do so. I'll give you three here.

The first is wellness. This isn't a niche conversation anymore. The global wellness economy reached 6.8 trillion US dollars in 2024, doubling since 2013, and it is growing faster than the broader global economy. Younger consumers, who drive the lion's share of that spending, rank sleep and health as their top priorities. Wool has always delivered thermal comfort, breathability and a natural skin feel. How will we bring that message to this market? It's an opportunity our industry cannot afford to leave on the table.

The second reason is wool's sustainability. The EU's Product Environmental Footprint methodology, as currently constructed, claims wool is somewhere between 11 and 33 times worse for the planet than acrylic, nylon or polyester. The Make The Label Count Campaign has helped secure important recognition from the European Commission that there are serious methodological issues, and will continue its efforts as EU textile policy moves from development to implementation. At the same time, the industry is moving forward with its own science. Researchers applying IWSO 14067:2018 have developed a comprehensive new framework for including biogenic carbon flows on farms. When biogenic carbon is included in life cycle assessment, we get closer to the real environmental impact of producing wool. With a number of case studies in progress on farms and ranches around the world, we will soon have solid real-world data to counter the current situation.

This last point brings me to the third reason for wool's continued relevance. Wool is more than just a fibre or a factory figure. Wool is intricately connected with humanity, supporting rural families and communities worldwide. Behind every wool fibre is a human story, as FAO Assistant Director General and Chief Veterinarian Thanawat Tiensin aptly put it, in a video address to delegates at IWTO's 95th Congress.

Ultimately, these are wool's advantages, and what will build wool's continued future. I look forward to building that continued future with you – in Norway in November, in South Africa next April, and at each stop along the way.

BRINGING WOOL'S STORY TO THE WORLD

It has been a landmark few months for IWTO. I want to use this opportunity to share why — and to invite you to be part of what comes next.

In June, the wool world gathered in Dalang, China, for our 95th Congress. In the heart of a city with over 28,000 textile businesses, knitting some 900 million sweaters a year, 238 delegates from across the global supply chain came together to focus on wool. Wool, as you know, is one of the earliest fibres used by humankind. Humanity and wool have evolved together. How will it fare in this new world of AI, digitalisation, and chaotic market forces?

These are the tough questions of our times.

The 95th Congress had two notable milestones. First, Food and Agriculture Organisation of the United Nations joined an IWTO Congress for the first time. This speaks to just how far wool's advocacy has travelled. Second, the Congress marked the launch of our IWTO Green Book. Commissioned by the Italian National Committee two years ago and led by Dr Paul



By Dalena White
Secretary General, International
Wool Textile Organisation

Swan, the final version was distributed to attendees (and it available to download on the IWTO website). The Green Book is a science-backed summary of wool sustainability. It's exactly the shared resource our industry needs: one voice, one set of facts. Alongside it, on-farm studies on the biogenic carbon cycle of wool production are now underway, with results expected by the end of 2026 — further strengthening the science supporting wool's sustainability credentials.

A few months earlier, in November, we were in Maseru, Lesotho, for our Wool Round Table. This event, the first ever in the Mountain Kingdom, drew more than 200 participants from 13 countries — including 105 delegates from Lesotho's wool and mohair growers, the largest grower contingent ever assembled at an IWTO event. Lesotho is the world's second-largest mohair producer, and nearly 70% of its population lives in the rural highlands where wool and mohair anchor the local economy. That scale of grower engagement was a genuine highlight of the year, and a reminder of why these gatherings matter: they put producers in the same room as processors, brands and policymakers, where the real decisions get shaped.

Behind the scenes, our technical committees keep the industry's foundations solid. Our Wool Trade Biosecurity and Wool Sheep Welfare working groups, now merging into a single, more efficient group, have continued close collaboration with the World Organisation for Animal Health, including formal recommendations on sheep and goat pox protocols for wool and hair. An updated edition of the

IWTO Specifications for Wool Sheep Welfare was also finalised this year.

Elsewhere, the Make The Label Count campaign continues to grow in reach and impact. What began as an IWTO-led response to flaws in the EU's Product Environmental Footprint methodology is now a coalition of 83 natural fibre industry members, actively engaging in EU-level discussions on the PEFCR methodology as those rules head into revision during 2026. This campaign is living proof of what natural fibres can achieve when advocating together.

This has also been a year of new membership. We welcomed five new members in the past 12 months: the Central Wool Development Board (India), Sura & Co. (Belgium), Alsadu Society/ Soof Wool Mill (Kuwait), the ZDHC Foundation (the Netherlands), and the Wool Research Association (India), with discussions underway with organisations in South Korea, Vietnam and beyond. Every new member brings their own strengths and benefits the ability of the flock.

You'll find IWTO out and about too. Find us at Performance Days in Munich and Shanghai, at Bharat Tex, and at the Bremen Cotton Conference. Wherever the conversation about textiles and sustainability is happening, we aim to bring wool into the room.

Looking ahead, our priorities stay grounded: high-quality service for our members, the membership base that funds our work, and continued outreach to new members. Mark your calendars for our coming events: the 2026 Wool Round Table heads to Oslo, Norway, on 24–25 November, and Congress 2027 goes to Stellenbosch, South Africa, on 20–22 April.

None of this happens in isolation. Wool's greatest strength is that the entire pipeline chooses to face shared challenges together. If your business isn't yet part of that network, connect with me via iwto.org. Let's keep making wool's case, together.

PETER ACKROYD



The global wool industry has lost one of its most respected voices with the passing of Peter Ackroyd MBE (1949–2026). A towering figure in the global wool and textile industry, with a career spanning over 50 years, he served as Chairman of the Campaign for Wool, President of the International Wool Textile Organisation, and Global Strategic Advisor for The Woolmark Company.

Throughout a distinguished career spanning decades, Peter made an enormous contribution to the promotion, development and understanding of wool, earning the respect of growers, processors, manufacturers and retailers around the world.

It is fitting that this edition includes one of his final editorials. As always, Peter offers thoughtful insight and a deep understanding of the challenges and opportunities facing the wool industry.

We are privileged to publish these articles and we do so in gratitude and recognition of his remarkable contribution to our industry and as a tribute to a man whose knowledge, integrity and passion for wool will be greatly missed. It was a privilege to know Peter and work with him.

A WELCOME RETURN TO WEARABLE WOOL

By the late R. Peter Ackroyd

In the days leading up to Milano Unica (July 7–9), Europe's premier textile exhibition for the autumn/winter 2027/28 season, which is reserved exclusively for European weavers, two major menswear events in Milan and Paris delivered a welcome message of catwalk sanity. "It might be more advisable if we were to create looks people would really like to wear," was one of the standout comments from the Milan Menswear shows, a sentiment echoed throughout the increasingly influential Paris Menswear collections.

For woollen and worsted weavers presenting their new collections at Milano Unica, this represented encouraging news after several seasons dominated by theatrical and often unwearable fashion from Europe's luxury brands. The return to wearable, commercially relevant clothing can only strengthen demand for premium fabrics.

Trading conditions, however, remain mixed. The ongoing conflict in the Middle East has introduced another layer of uncertainty, adding to concerns created earlier this year by tariff threats from the White House.

According to several leading exhibitors in Milan, the important made-to-measure (MTM) tailoring and outerwear sector remains "the only positive game in town for traditional worsted weavers." At the same time, a growing number of premium cloth producers are blending superfine Merino with luxury fibres such as cashmere, vicuña and silk, underlining an increasingly polarised market where exclusivity commands a premium.

The prestigious Idea Biella section of Milano Unica continues to be dominated by Italy's leading Merino worsted producers. However, the growing presence of woollen mills—primarily from the UK—has added another dimension to the exhibition and its seasonal fashion direction.

Abraham Moon, Harris Tweed Hebrides, Kynoch of Scotland, Lochcarron of Scotland, Mallalieus, Marling & Evans, Marton Mills and Magee of Ireland all reported strong interest in traceable jacket and coating fabrics made wholly or partly from British and Irish wools, reflecting the growing importance of provenance and sustainability in premium apparel.

Despite a pessimistic outlook from Italy's Confindustria Moda, which revised the sector's performance forecast for the period since February 2026 from -1.5% to -3.4%, many exhibitors finished the three-day event with cautious optimism.

Ercole Botto, CEO of REDA, highlighted the strength of the euro as a continuing obstacle to export competitiveness, while Alessandro Barberis of Vitale Barberis Canonico expressed confidence that his company would achieve growth during 2026.

Milano Unica once again celebrated the strength of natural fibres, reinforcing its position as the world's leading showcase for premium European textiles and one of the few major fashion events that remains unapologetically committed to European manufacturing and craftsmanship.

CHANGING SEASONS

By the late R. Peter Ackroyd

Just twenty-five years ago, the idea of presenting winter wool collections in June would have seemed completely illogical. June was traditionally devoted to pre-collection presentations, with spinners and weavers travelling extensively through East Asia and North America to preview developments with key customers ahead of the main selling season in September and October.

The shift to today's calendar can largely be traced back to the American menswear market. During the closing years of the twentieth century, major US brands began competing fiercely for the "first look" at new collections, seeking exclusive access to fabrics from Britain's and Italy's leading mills. Gradually, the entire European textile calendar moved forward.

Today, June and July have replaced September and October as the industry's principal selling months. Milano Unica Autumn/Winter 2027/28 was held from July 7–9, 2026, in the searing summer heat of Milan's Rho Fiera exhibition centre, while Pitti Filati, Europe's leading yarn exhibition for the same season, took place in Florence from June 24–26. Both Italian events continue to exclude non-European producers from exhibiting—but that is another story.

Global uncertainty continues to weigh on confidence throughout the textile supply chain. Tensions in the Middle East, together with broader economic concerns, have prompted questions over whether the recovery in production seen across many wool processors earlier this year can be sustained.

Recent retail data has also painted a less encouraging picture. Bank of America Securities reported apparel sales growth across 36 international markets slowing from 5.4% in March to 2.4% in April. Germany, Europe's largest apparel market and one of the continent's largest consumers of wool products, experienced a particularly sharp slowdown according to TextilWirtschaft, while the UK also recorded weaker retail performance, with overall sales declining and clothing sales growing at a much slower pace than a year earlier.

The UK nevertheless remains one of the world's most significant markets for Merino knitwear. Major retailers including NEXT, Marks & Spencer, Reiss, Charles Tyrwhitt, John Lewis, The White Company and others collectively consume around 3,000 tonnes of Merino yarn annually. Chinese spinners continue to dominate yarn supply into this market, although Indian manufacturers are steadily expanding their presence, particularly in the mid-priced segment.

At the premium end of the market, brands such as Burberry, John Smedley, Sunspel, Johnstons of Elgin and Paul Smith continue to source much of their yarn from suppliers in the UK, Italy and Eastern Europe, maintaining a strong commitment to quality and traditional manufacturing expertise.

Higher raw wool prices inevitably raise concerns that some retailers may once again respond by increasing the proportion of synthetic fibres in blended products, as occurred during the price spike of 2011. Yet history also offers grounds for optimism.

When wool prices reached record levels fifteen years ago NEXT chose not to dilute the quality of its premium knitwear. Instead, under the leadership of Lord Simon Wolfson, the company increased wool content in selected garments, remaining committed to producing aspirational products at affordable prices rather than compromising quality.

A similar philosophy is evident at Uniqlo. Founder Tadashi Yanai has frequently acknowledged the influence of NEXT's retail model and has more recently embraced Vivienne Westwood's enduring message: "Buy less, buy better, make it last." Such thinking aligns naturally with wool's durability, performance and sustainability credentials.

Could two of the world's most successful mass-market apparel retailers prove to be harbingers of better fortunes for wool in the Autumn/Winter 2027/28 season?

Sustainable, ethical and responsible.

Our six pillars

Setting the standard in wool production.

KIND TO ANIMALS

ENVIRONMENTAL SUSTAINABILITY

QUALITY ASSURED

TRACEABILITY

SOCIALLY RESPONSIBLE

NON-MULESED WOOL



There are six key principles to British Wool that not only make it unique, they offer buyers peace of mind that the product they are purchasing is truly the right choice.

To find out more, contact the British Wool marketing team – **marketing@britishwool.org.uk or call 01274 688666.**

britishwool.org.uk

AUTHENTIC TRACEABLE BRITISH WOOL

THE CAMPAIGN FOR WOOL
Patron: HM King Charles III



focus on
NORWEGIAN WOOL

In November, the International Wool Textile Organisation (IWTO) will host its annual Wool Round Table in Norway. The IWTO Wool Round Table is one of the organisation's two major annual events and provides a focused forum for woolgrowers, processors, manufacturers, retailers and other industry stakeholders to discuss strategic issues affecting the global wool sector.

The event also offers members the opportunity to engage with regional markets and gain a deeper understanding of the host country's wool industry and supply chain. A key feature of the Round Table is its emphasis on host-country insights, providing delegates with an in-depth look at local wool production systems, agricultural practices, processing capabilities and market developments. Through presentations, industry discussions and technical visits, participants gain valuable perspectives on the opportunities and challenges facing the wool industry in the host region.

Norway may not be one of the world's largest wool-producing nations, but its wool industry has earned a reputation for quality, durability and sustainability. Produced in a challenging Nordic climate and supported by a long tradition of sheep farming, Norwegian wool is increasingly being recognised as a valuable natural fibre with unique performance characteristics.

Sheep farming has been an integral part of Norwegian agriculture for centuries. Grazing on mountain pastures, coastal grasslands and rugged terrain, Norwegian sheep are exposed to some of the most demanding weather conditions in Europe. As a result, the wool they produce has evolved to provide exceptional protection against cold, wind and moisture.

The Norwegian White Sheep dominates the national flock, accounting for the majority of wool production. Several native breeds, including Spælsau and Old Norwegian Sheep, also contribute distinctive fibres valued for their character and durability.

Norway produces approximately 3,000 to 4,000 tonnes of wool annually. While relatively small compared with major wool-producing countries, such as Australia and New Zealand, the Norwegian clip is highly regarded for specific applications where resilience and performance are essential. Norwegian wool is generally classified as medium to strong wool, typically ranging between 28 and 40 microns, depending on breed.

Daniel Isbecque of Curtis Wool Direct, a major exporter and processor of Norwegian wool, says, 'The fibre is known for its excellent durability and abrasion resistance, as well as its natural elasticity and resilience. It has good insulation properties, high loft and bulk, and strong moisture-management capabilities. These characteristics make Norwegian wool particularly suitable for knitting yarns, outerwear, blankets, upholstery fabrics and carpets.

'Unlike finer apparel wools, Norwegian wool's strength allows products to maintain their shape and performance over many years of use. This durability aligns closely with growing consumer demand for longer-lasting, sustainable textile products,' says Daniel Isbecque.

Sustainability is one of Norwegian wool's strongest selling points. Sheep farming in Norway is typically extensive and pasture-based, with animals spending much of the year grazing natural landscapes. This approach requires relatively low inputs while supporting biodiversity and helping maintain traditional agricultural environments.

The short and transparent supply chain is another advantage. Norwegian wool can be traced through to finished product under the Nordic Eco Label accreditation scheme, providing consumers with confidence regarding animal welfare, environmental standards and product origin.

'IWTO members Norilia and Fatland represent the majority of the wool pipeline in Norway, and together they show what traceability and sustainability look like in practice,' says Dalena White, Secretary General of the International Wool Textile Organisation. 'Norilia's scoured wool carries the Nordic Swan, ensuring the lowest possible use of chemicals in production and full traceability through processing. Fatland connects more than 5,000 farmers, employees and partners across Norwegian animal husbandry, treating climate, nature and people as equal partners. Suppliers and services are carefully mapped to further strengthen the traceability of the Norwegian clip.'

The wool industry plays an important role in supporting rural economies throughout Norway. Sheep farming provides income for thousands of agricultural families, particularly in regions where alternative farming opportunities are limited.

While Norway's wool production remains modest in volume, its focus on quality rather than quantity continues to create opportunities in premium markets. With increasing attention on sustainability, circularity and responsible sourcing, Norwegian wool represents a fibre with traditional strengths are becoming more relevant than ever in the modern textile industry.

Q&A

G MODIANO'S ACQUISITION OF THE SCHNEIDER GROUP

Victor Chesky speaks with Michael Modiano about the motivation behind the acquisition

Q: What were the primary strategic objectives behind G Modiano's acquisition of The Schneider Group?

The starting point is that The Schneider Group is a long-established business, based in Italy at the centre of the European textile industry, with a reputation for quality and excellence in wool trading and processing. The transaction gives G Modiano an opportunity to combine assets and activities that are synergistic with our existing business. The Schneider Group is active in a number of areas that are new to or complementary to G Modiano's, therefore one plus one should equal more than two.

The Schneider Group also includes many very dedicated and accomplished staff with decades of experience in a mature industry that does not always find it easy to attract and nurture new talent. The most important assets are not always on the balance sheet. It should be noted that G Modiano never sought to make an aggressive, hostile takeover. The deal was conducted amicably and in good faith with the Schneider family, whom the Modiano family have known for decades.

Q: How will the acquisition enhance G Modiano's global market position?

One of the main industrial assets included in the transaction is a majority stake in Pettinatura di Verrone, based in Italy, a combing mill with an illustrious reputation, specialising in superfine and ultrafine wool-processing as well as other noble fibres such as cashmere and vicuna. This has opened up new markets and a new clientele to G Modiano, including some very prestigious names in the luxury sector. The Schneider Group also has a majority stake in Mediterranean Wool Industries, a wool-processing factory located in Egypt. The plant has a well-established wool combing facility as well as a wool carbonising line, the latter being a new activity within G Modiano, which should bring us new clients. We also see Egypt as a growing area for wool-textile manufacturing, and a number of our European and Turkish clients have moved there or are thinking of doing so.

It should also be noted that many of the fastest growing economies in the world are located in Africa and the Middle East.

In Australia and New Zealand, Schneider has highly professional staff with many years of experience, able to source premium-quality wool at a time when sheep populations are declining in both those countries. The deal also brings us a dynamic and talented trading team based in Biella, a city and region synonymous with producing the highest-quality wool textiles in the world.

Q: How will this acquisition affect the way each of these two companies conduct business, and how will customers of both companies be affected by this merger?

The philosophy we are adopting is evolution and not revolution. Any changes to the way the companies will conduct business are likely to be incremental, without any major or quick transformation. Customers will be offered an extremely broad product range, the largest stock of prompt tops in Europe and fast delivery times from strategically-located factory warehouses in Czechia, Egypt and Italy. The merger gives rise to an enlarged company operating mainly under European law, that is financially stable, with minimal debt and minimal counterparty risk.

Q: What opportunities do you see for expanding product development and sustainability initiatives following the acquisition?

We are keen to work with our clients and downstream brands to develop products in a market that is becoming increasingly segmented and where provenance, quality and responsible manufacturing are ever more important. In this regard, one of the assets that Schneider brings to the enlarged group is Authentico, one of the wool industry's most forward-looking wool sustainability and traceability programmes.

Authentico recognises that meaningful sustainability starts with growers. The scheme supports farms that demonstrate best practice in animal welfare, land and pasture management, social responsibility and fibre quality. Authentico recognises that clients and brands also depend on responsible and sustainable manufacturing, which is why our scouring and combing factories in Czechia, Egypt and Italy are managed to such a high standard and hold multiple accreditations from other certifying bodies as well.

Unlike a number of other certification-schemes, Authentico also stands for quality, from the farm to the scoured wool and through to the wool top. The fibre is checked at every stage as it makes its way through the pipeline.

Finally, but very importantly, Authentico stands for traceability from the farm to the wool top and beyond. Our integrated IT platforms digitally capture and validate information at every stage of the supply chain, creating a secure, comprehensive, and auditable traceability record from farm through processing to the finished Authentico wool top. This enables every Authentico wool top to be traced back to its verified farm of origin, providing our clients with transparency, assurance, and confidence in product provenance.

Furthermore, our internal traceability systems are interoperable with leading third-party traceability platforms, several of which we actively utilise already. This allows traceability to extend beyond the Authentico wool top into downstream manufacturing processes and ultimately through to the finished consumer product, supporting end-to-end supply chain transparency.

Considering that Modiano and Schneider have different strengths when it comes to sourcing raw wool, selling tops and marketing other wool products, the merger of the companies presents a significant opportunity to accelerate the Authentico Integrity Scheme, bringing important benefits to our wool growers and our clients alike.

Q: Will this acquisition strengthen the ability of the European top making industry to be more competitive worldwide?

For the reasons stated above, we believe the G Modiano-Schneider transaction is synergistic and will therefore allow us to be more competitive in global markets. Our combing factories also process for third parties, mainly European top makers, who should also benefit. However, one needs to look at the bigger picture here.

For many years, the European wool textile industry has had to comply with environmental standards, social responsibility standards, legal compliance or codes of conduct that are often lacking or even absent in other parts of the world. This doesn't only apply at the level of wool scourers and combers but also to spinners, weavers, knitters and other downstream manufacturers.

Furthermore, a number of non-European countries provide direct and indirect subsidies to their wool-textile enterprises that aren't available to their European counterparts. Finally, some of those countries are free to export to the EU but make it very difficult for European manufacturers to reciprocate. With all this in mind, we should not just be talking about the need for the European top making industry to be more competitive, but the whole wool-textile chain.

The Modiano-Schneider merger gives the European wool industry and the many brands who value responsibly-made, local production, a solid keystone supplier that is transparent, stable and reliable.

We believe, therefore, that the service we provide plays an important part in protecting the competitiveness and future of the European wool textile industry in general.

GIVING SAVILE ROW WASTE A SECOND LIFE

In an industry searching for more sustainable solutions, some of the most compelling innovations are emerging from projects that combine heritage textile skills with cutting-edge circular manufacturing practices.

Seal International, the Bradford-based speciality fibre processor, in collaboration with Eco-Luxe and renowned Savile Row tailors, has launched a project demonstrating how textile waste can be transformed back into a luxury cloth while maintaining exceptional quality, traceability and a remarkably low environmental footprint.



The project focuses on transforming cutting-room waste generated by some of the world's most respected tailoring houses on Savile Row. Rather than allowing these valuable natural fibre materials to become discarded waste, the cloth remnants are recovered by Eco-Luxe and incorporated into a new luxury cloth.

"A key aspect of the process is its Yorkshire-based supply chain. Every stage takes place within the region's historic textile cluster, reducing transport and maintaining close control over production," says Phil Seal, of Seal International.

The resulting blend consists of 50% wool cloth waste from Savile Row cutting rooms, and 50% virgin Bluefaced Leicester wool, selected for its softness, lustre and excellent spinning performance.

The Savile Row cloth waste is then garnetted in West Yorkshire. Garnetting is a specialised recycling process that mechanically opens and reclaims fibres from textile waste, allowing them to be reintroduced into the manufacturing chain.

Seal International then cuts the Bluefaced Leicester wool tops to the required fibre length before blending them with the garnetted recycled material at its Bradford mill. This careful blending process ensures consistency and quality while preserving the character of the original cloth.

The blended fibre is subsequently spun into yarn by Brierley Brothers in Huddersfield before being woven into cloth by Stanley Mills Weavers. The cloth is then dyed and finished by Roberts Dyers and Finishers, in Keighley, West Yorkshire, creating a fully British-made textile with complete supply chain transparency.

The cloth is milled during the finishing process to achieve a soft, lightweight handle, ideally suited to luxury jackets and tailored garments, before being transformed into bespoke garments through a specialist tailoring company, completing the journey from Savile Row cutting-room surplus to finished luxury apparel.

The result is a cloth that combines comfort, and visual character with strong sustainability credentials.

"One of the most distinctive features of the cloth is its visual character. Small flecks and colours originating from the original silk selvedges and fabrics remain visible within the finished material, creating a unique appearance reminiscent of traditional Donegal tweeds," says Phil Seal. "No two lengths of cloth are exactly alike, giving each garment its own identity and story."



"This collaboration highlights how the luxury textile sector can embrace circularity without compromising quality or craftsmanship. Rather than viewing textile waste as a disposal problem, the project demonstrates how valuable fibres can be recovered and transformed into desirable, high-value products."

"For us at Seal International, the initiative reinforces our company's commitment to innovation, sustainability and the long-term future of natural fibres. It also showcases the capabilities that still exist within Yorkshire's textile cluster, where fibre processing, spinning, weaving, dyeing and garment production can all be carried out within a relatively small geographical area," says Phil Seal.

The result is more than just a recycled cloth: it is a demonstration of how the British wool and the British textile industry can create premium products from existing resources while preserving skills, supporting local manufacturing and reducing environmental impact.

"As brands, retailers and consumers increasingly seek products with genuine sustainability credentials, projects such as this provide a compelling blueprint for the future of luxury textiles—bringing together heritage, traceability, exceptional craftsmanship and circular manufacturing within a single cloth. Building on this foundation, we plan to expand the concept with luxury blends incorporating camelhair and cashmere sourced through our sister company, further demonstrating the strength of our fully integrated supply chain."



BEYOND CERTIFICATION:
The Woolmark Ecosystem

In today's global textile industry, quality alone is no longer enough. Manufacturers, brands and consumers are looking for confidence; confidence that products will perform as expected, that claims are credible, and that supply chains are supported by trusted technical expertise.

This is where fibre brands play an increasingly important role. While many certification programs focus solely on verifying compliance, the world's most successful fibre brands do much more. They create demand, establish technical standards, drive innovation and connect businesses across the value chain.

For more than 60 years, Woolmark has evolved into one of the world's most recognised fibre brands by doing exactly that.

Introduced in 1964, the iconic Woolmark logo has become synonymous with quality, authenticity and performance. Woolmark has grown beyond a certification program into a global ecosystem that brings together woolgrowers, exporters, processors, manufacturers, brands, retailers, researchers and educators with a shared objective: helping wool compete and succeed in a rapidly evolving textile market.

More Than a Licence

Becoming a Woolmark licensee means more than earning the right to use one of the world's most recognised fibre trademarks.

It provides access to an international network of technical specialists, fibre scientists, product developers and industry partners working to improve how wool is processed, manufactured, marketed and understood. Through this ecosystem, manufacturers gain access to globally recognised testing, product development support, technical guidance and the latest research, helping reduce development risk while improving consistency and product performance.

Thousands of companies worldwide participate in the Woolmark Licencing Program across apparel, knitwear, interiors, carpets, bedding and technical wool products. Together, they contribute to a globally recognised standard that gives brands, retailers and consumers greater confidence in wool products.

Creating Demand Through Innovation

Strong brands are built not only on trust but also on relevance.

As consumer expectations evolve, Woolmark works across the supply chain to ensure wool continues to meet the needs of modern markets. Research and innovation have helped expand Merino wool into new categories including performance sportswear, outdoor apparel, next-to-skin garments, technical textiles and lightweight travel clothing.

Applied fibre science, internationally recognised testing methods and collaborative product development help manufacturers improve processing efficiency, validate product performance and bring innovative wool products to market with greater confidence.

By helping brands unlock new applications for wool, Woolmark also creates new commercial opportunities for processors, spinners, weavers and manufacturers throughout the supply chain.

Building Industry Capability

Innovation alone is not enough if knowledge cannot be shared.

Education has therefore become one of Woolmark's defining strengths. Through technical training, product specifications, manufacturing guidance and partnerships with universities and research institutions, Woolmark helps build the capability needed to process wool consistently and confidently at scale.

This knowledge sharing supports everyone from product developers and textile engineers to designers and students entering the industry, helping ensure that expertise continues to grow alongside demand.

A Brand That Connects the Industry

One of Woolmark's greatest strengths is its ability to connect the global wool industry.

Few organisations operate across every stage of the textile value chain. Woolmark works with woolgrowers, exporters, processors, manufacturers, brands, retailers, researchers and consumers, helping align technical standards, encourage collaboration and accelerate innovation.

This connected approach allows new ideas to move more quickly from research into commercial products while giving manufacturers greater confidence that innovation is supported by robust science, internationally recognised standards and growing consumer demand.

Evolving for the Future

As market expectations continue to evolve, so too does Woolmark.

The recently introduced Woolmark Recycled Wool Specification enables qualifying recycled wool products to be certified under the trusted Woolmark Licencing Program, extending confidence into recycled wool while maintaining the rigorous standards associated with the Woolmark brand.



The Woolmark-certified interior of the Volvo XC90 showing the seat cover carrying the Wool Blend Performance label

DID YOU KNOW?



Franco Grignani

Launched in September 1964 by the International Wool Secretariat, the iconic Woolmark logo was designed by Italian architect and Op Art pioneer Franco Grignani. Created to help consumers identify high-quality 100% pure new wool during the post-war rise of synthetic fibres, the logo quickly became one of the world's most recognisable textile symbols.

Grignani had originally been appointed to the judging panel for the International Wool Secretariat's 1963 global design competition, but resigned to submit his own entry under a pseudonym. According to design folklore, he sketched the now-famous spiral motif with a fork on a tablecloth. The geometric black-and-white "wool ball" went on to certify more than five billion wool products worldwide.

The Woolmark Company (TWC) later expanded its certification program with the Woolmark Blend logo for products containing 50% to 99% wool, and the Woolblend mark for products containing 30% to 49% wool.

In 2024, TWC introduced Woolmark+, an industry roadmap designed to connect wool growers, processors, manufacturers and brands in support of a more natural and circular wool supply chain. The initiative also launched the Recycled Woolmark logo for products containing at least 20% recycled wool while meeting the Woolmark Certification Program's stringent quality standards.

More than 60 years after its launch, the Woolmark logo remains a globally recognised symbol of quality, certifying fibre content, performance, washability and colourfastness.

Alongside this, Woolmark+ provides a strategic roadmap for the future of wool, bringing together initiatives focused on areas including nature-positive production, circularity and animal wellbeing. Together, these initiatives help prepare the global wool industry for changing market expectations while continuing to reinforce confidence in Australian Merino wool.

Confidence Creates Value

Independent certification has never been more important.

Consumers increasingly want assurance about the products they buy. Brands require credible evidence to support product claims. Manufacturers need trusted technical standards that reduce risk and improve consistency. Across the textile industry, confidence has become a competitive advantage.

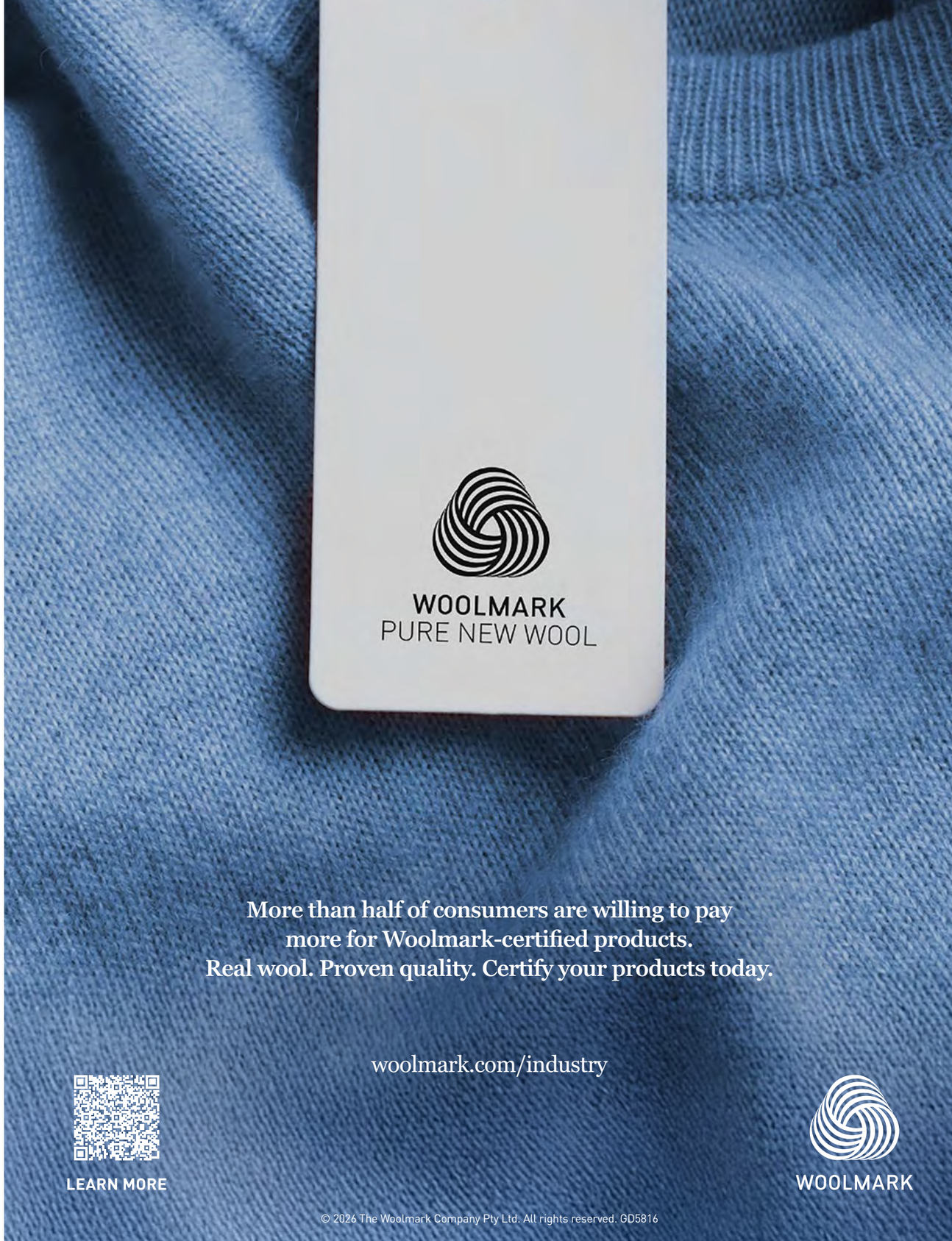
For more than six decades, Woolmark has helped build that confidence.

By combining independent certification with technical leadership, scientific research, innovation, education and global collaboration, Woolmark has established itself as far more than a certification mark. It has become one of the textile industry's most influential fibre ecosystems that creates value for every stage of the supply chain, from Australian woolgrowers through to the consumers who ultimately choose wool.

Because when the entire pipeline has confidence in wool, the entire industry moves forward.



Machine washable Merino wool clothing - such as suits, jackets and trousers - are suitable for cleaning in a domestic washing machine then hanging on a line to dry.



STANDARD WOOL UK INVESTS IN NEW SCOURING LINE



Paul Hughes Managing Director, Standard Wool UK

Standard Wool UK's investment in a new state-of-the-art scouring line marks a significant step forward for the wool industry in the UK. British wool varies considerably depending on breed, region and fleece type, from stronger hill wools produced in northern and upland regions to softer lowland fleeces from areas such as Lincolnshire, Norfolk and Devon. The new scouring line will enable Standard Wool UK to provide the flexibility needed to process this broad range of wool fibres efficiently and reliably.

In addition to sheep wool, the line will also support the processing of UK Alpaca fibre, expanding Standard Wool's ability to work with alternative natural fibres as interest in British-grown speciality fibres continues to grow.

I asked Paul Hughes, Managing Director at Standard Wool UK, to outline the major benefits this new line will offer buyers of UK scoured wool worldwide.

'This new scouring facility is designed to improve processing efficiency, fibre quality, and environmental performance. It also strengthens the UK's wool processing infrastructure and export capability.

'This scouring technology allows for more consistent processing conditions throughout the scouring operation. This helps protect fibre integrity, improve cleanliness levels and reduce variability between batches. Ultimately, customers benefit from cleaner, more consistent wool that performs better in downstream processes such as combing, spinning and nonwoven manufacturing.

'Sustainability was a major consideration from the beginning. We believe that to sell sustainable fibre today you must be sustainable from the very beginning. The new line has been designed to lower energy consumption energy consumption while improving the recovery and management of wool grease and other by-products. Our wool grease consistently shows very high cholesterol.

'And most importantly, it replaces a 36 year old line and gives the industry confidence that we will be here processing for another 36 years!'

Does the new line increase production capacity?

Yes, the investment allows us to increase our processing capability and improves workflow efficiency. This positions us well to respond to changing market conditions and growing customer

Introducing...
The worlds newest wool scour
Securing the future of wool scouring in the UK
In the heart of Yorkshire at our Thomas Chadwick Mill
Standard Wool
www.standardwool.co.uk



demand while maintaining high processing standards. International customers are increasingly seeking reliable suppliers that can provide quality assurance, traceability and sustainable processing standards. The new line enhances that ability and strengthens our position as a supplier to UK and international clients.

What are the advantages of importing scoured wool rather than greasy?

'Textile companies will benefit greatly by importing British wool in scoured form, not greasy. Due to the large variety of sheep breeds in the UK, deep knowledge about best scouring will determine, quality of the outcome. At Standard Wool we have been scouring British wool for over 100 years and always deliver to strict customer specification.

'Receiving wool that has already been scoured is an advantage to any manufacturer - it minimises production delays and is ready for use as soon as it is delivered. All dirt is removed at the country of origin, reducing environmental impact, and reducing delivery costs due to reduced weight.'

When extra costs in transportation, processing, and environmental compliance are taken into account it makes better financial sense to receive wool already clean and ready.

What does this investment mean for UK wool growers?

The new scouring line reinforces our commitment to supporting the wool supply chain over the long term. Growers and suppliers benefit from having access to modern, efficient processing infrastructure capable of handling wool to high international standards. It also strengthens the UK's wool processing capability at a time when maintaining regional processing capacity is increasingly important.

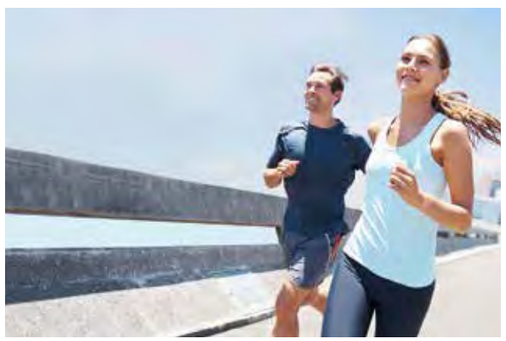
The wool industry faces increasing competition from synthetic fibres and evolving customer expectations. Innovation is critical. Continued investment in modern processing technology helps ensure wool remains competitive, efficient and relevant in global textile markets. Projects such as this demonstrate that the industry is continuing to evolve and invest in its future.

'Despite global economic challenges, there are still strong opportunities for wool, particularly in sustainable and high-performance textile applications. Investing in modern infrastructure demonstrates belief in the long-term future of wool and in the importance of maintaining strong processing capability within the UK and Europe,' concludes Paul Hughes.

SAURER.

The art of premium wool processing.









From wool to value with innovative machinery

Turn sustainable wool into premium products with Saurer. From fine suiting fabrics to advanced functional wear, Saurer's innovative ring spinning, compact spinning, and twisting solutions help manufacturers produce superior wool yarns with exceptional quality, productivity, and reliability.

saurer.com

Smarter Spinning WITH ZINSER 451



Cem Yalcin

> ***With natural fibre prices continuing to increase, reducing waste and protecting valuable raw material has never been more important***

Saurer is the market leader in worsted spinning and, with its extensive knowledge, can position its customers ideally to meet the challenges of the future. Especially in fully automated linked installations, many efficiency factors can be optimally exploited, such as use of space, coordination of spinning and winding capacity, labour requirements and quality management.

Saurer's answer to the growing demand for higher quality and greater productivity in worsted spinning is the Zinser 451 (ZI 451). Designed for maximum versatility, the machine efficiently spins wool, cashmere, silk and their blends, while also processing acrylic yarns for carpet applications, making it a flexible solution for a wide range of spinning requirements.

'Applications for wool are no longer limited to suit fabrics. The focus today goes beyond this classic application to include functional clothing for sports and outdoor activities as well as interiors for the automotive and aviation industries,' says Cem Yalcin, Chief Sales Office of Saurer Group. The Zinser 451 offers flexibility for all of these options,'

The Zinser 451 is an all-round machine with high flexibility. Fashion trends can be implemented quickly and efficiently. In addition to standard and compact yarns, it produces high-quality two-ply yarns, elastic core yarns and trendy fancy yarns. Two-ply yarns can be spun directly on the ring-spinning machine with the Sirospun device, without the expense of an additional twisting process. These yarns are convincing in further processing as well as in the end product due to their extremely high yarn strength and a smooth yarn surface. They are used in outerwear and home textiles as warp and/or weft yarns.

The machine's electronic over-delivery gear drive allows operators to precisely adjust wool fineness and crimp through Saurer's Easyspin control system. Productivity is further enhanced by Saurer's Optispeed technology, which continuously optimises spindle speed based on spinning limits and yarn-break thresholds. Working with Individual Spindle Monitoring (ISM), the system helps maximise output while maintaining yarn quality and reducing breaks.

A key advantage of the Zinser 451 is its Impact FX compact spinning system, the only self-cleaning compact system available



worldwide. Designed to resist wool grease, textile lubricants and finishing agents, it maintains stable performance under demanding production conditions.

Its flexible compacting apron continuously flexes during operation, preventing fibre fragments and contaminants from accumulating. Combined with optimised airflow, the system minimises blockages, reduces machine stoppages and delivers consistently uniform compact yarn.

The Zinser 451 can be equipped with Saurer's Energy Monitoring system, providing real-time consumption data through the Easyspin interface. Mills can identify opportunities to improve efficiency and reduce operating costs.

The machine can also be fitted with Spinnfinity, Saurer's zero-underwinding innovation, which significantly reduces yarn waste while lowering energy consumption.

'German engineering remains synonymous with quality, reliability and long-term performance. 'When you install Saurer spinning machines, you are not just buying a machine, you are buying years of technological experience, proven technology and exceptional service.

'With natural fibre prices continuing to increase, reducing waste and protecting valuable raw material has never been more important. For wool spinners seeking premium yarn quality, higher productivity, lower waste and dependable long-term performance, the Zinser 451 demonstrates why Saurer continues to set the benchmark in worsted spinning technology,' Mr Yalcin comments.

TEXTILE RECYCLING

through Advanced Mini Shredding and Spinning Technologies



By Adele Abdoos
Mesdan R&D Textile Engineer
and Oceania sales

As the textile industry moves towards more sustainable and circular production models, wool is increasingly recognized as one of the most valuable fibres for recycling. As a natural, renewable and biodegradable animal fibre, wool can undergo several mechanical recycling cycles while preserving many of its original textile properties.

During repeated recycling processes, fibres gradually become shorter due to mechanical opening and shredding. Nevertheless, high-quality wool fibres can be recycled up to five or six times, provided their average fibre length remains above approximately 20 mm, allowing them to be further processed into new yarns. This ability to maintain performance over multiple life cycles makes wool an excellent material for circular textile systems.

Preserving Fibre Quality for New Applications

The success of wool recycling depends on maintaining essential fibre characteristics, such as length distribution, fineness, strength and cleanliness. Depending on the quality of the recovered fibres and the intended final application, recycled wool can be used alone or blended with virgin wool and other fibres to achieve the desired spinning performance and yarn properties.

Therefore, evaluating the spinnability and optimal blending ratios before large-scale production is a fundamental step for manufacturers developing new sustainable products.

From Textile Waste to New Yarns

The combination of the Mesdan Mini Shredding machine and Mesdan Mini Spinning Line offers



an efficient solution for converting wool or any textile waste into valuable new yarns. The Mini Shredding system can process both soft textile waste, such as carding residues, yarn waste and production scraps, and hard textile waste, including knitted and woven garments, with a capacity of up to 60 kg/h.

The recovered fibres can then be transformed into yarn through the Mini Spinning Line, which reproduces the main stages of industrial spinning, including carding, drawing and ring spinning. Additional modules such as twisting, winding and circular knitting can also be integrated according to specific requirements.

Small Scale, Big Innovation

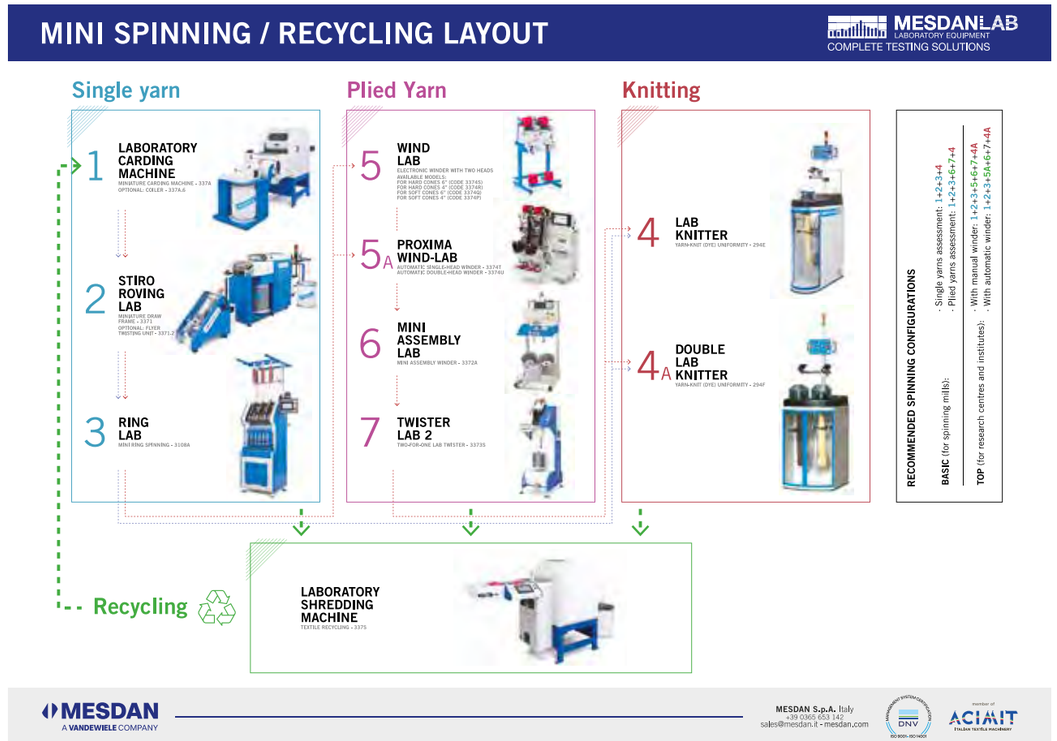
One of the major advantages of the Mini Spinning Line is its capability to process very small fibre quantities, typically only 20–50 grams. This enables manufacturers, research centres and educational institutions to rapidly evaluate recycled fibres, optimize the recycled-to-virgin fibre ratio and study yarn characteristics while minimizing the consumption of valuable raw materials.

Originally designed for research, education and yarn sampling, the system is increasingly becoming a practical solution for in-house small-scale recycling and production. Companies can recover their own textile waste, produce limited yarn batches, testing different color blending (mélange) and develop sustainable collections with reduced material loss and lower development costs.

A New Future for Specialty Animal Fibres

Compact recycling and spinning technologies also offer significant opportunities for specialty wool producers and cottage mills working with wool, cashmere, alpaca and other luxury animal fibres. By processing their own fibres and production waste, they can maintain full control of the value chain while creating high-value, sustainable products.

The future of the textile industry depends not only on the development of new materials but also on the ability to preserve and regenerate existing resources. By combining the natural recyclability of wool with innovative technologies such as Mesdan Lab Mini Shredding and Mini Spinning systems, textile waste can be transformed into new opportunities, supporting a truly circular and sustainable fibre economy.



INDEPENDENT TESTING

Underpins the Global Wool Trade



Duane Knowles with new robotics in the Napier laboratory

As wool markets become increasingly data-driven, demand continues to grow for faster turnaround times, greater precision and improved traceability. NZWTA has responded through ongoing investment in advanced technology and automation.

Its Napier laboratory incorporates sophisticated robotics and automated systems that improve testing accuracy and operational efficiency. Accurate fibre testing provides valuable insight into raw material performance before processing. Measurements such as fibre diameter, length, strength and yield help processors optimise machinery settings, minimise fibre loss and improve final product quality.

> ***"Independent fibre testing is an essential part of the modern wool supply chain"***

"Independent fibre testing is an essential part of the modern wool supply chain, giving growers, exporters, processors and brands confidence that wool quality is measured accurately and consistently," says Duane Knowles, Chief Executive of NZWTA." From determining grower returns to predicting processing performance in scouring and top making, objective testing underpins almost every commercial wool transaction.

"Wool testing is now firmly embedded within the commercial heart of the wool market and the industry clearly recognises the value of fibre testing. More than 99% of New Zealand wool traded today is tested," says Duane Knowles.

As New Zealand's largest wool testing facility, NZWTA supports exporters, traders, spinners, weavers and luxury fibre manufacturers with technical services designed to reduce commercial risk and improve supply chain transparency.

SETTING THE STANDARD IN WOOL AND TEXTILE TESTING



✓ FIBRE LENGTH MEASUREMENT ON SCOURED WOOL ✓ CORE TESTING OF GREASY AND SCOURED WOOL
✓ STAPLE MEASUREMENT ON GREASY WOOL ✓ FLEECE MEASUREMENT ON INDIVIDUAL ANIMALS
✓ INTERNATIONALLY RECOGNISED AND ACCREDITED TO ISO 17025
✓ MEMBER OF INTERWOOLLABS ✓ LICENSED IWTO LABORATORY

NZWTA WOOL TESTING
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"By nominating NZWTA in your sale contract, you ensure test results are independent and transparent, — giving customers the assurance they expect," says Duane Knowles. "Testing all your wool at one trusted facility simplifies logistics, improves internal processes and enhances communication throughout the supply chain."

While strongly associated with New Zealand wool, NZWTA also tests wool from the United States, Chile, Peru, the Falkland Islands and other South American countries.

"If you process wool from the Americas, Asia and India, as well as Continental Europe this wool can also be tested by NZWTA," says Duane Knowles. "It's simple and convenient — just specify NZWTA as your nominated testing house."

Expanding Demand for Residue and Sustainability Testing

Modern wool buyers require more than traditional fibre measurements. Brands, retailers and consumers increasingly seek evidence that wool has been produced responsibly and complies with environmental and chemical residue standards.

To meet these requirements, NZWTA and Agrifood Technology provide accredited chemical residue testing services for raw wool sourced anywhere in the world.

Agrifood Technology, based in Melbourne, Australia, is currently the only laboratory globally with ISO 17025 accreditation for chemical analysis of raw wool residues under the IWTO DTM-59 standard. Operated under licence from CSIRO, the system uses specialised patented technology to analyse wool grease extracts for residue compliance.

International samples can be submitted to NZWTA, where grease samples are extracted before being forwarded to Agrifood Technology for accredited analysis. The process provides an efficient pathway for producers and exporters to meet increasingly demanding regulatory and market requirements.

Beyond Traditional Fibre Testing

NZWTA's services extend beyond core wool testing to include fibre identification, research and development projects, sustainability certification programs and technical advisory services linked to evolving accreditation requirements.

As textile supply chains place greater emphasis on traceability, truth in labelling and environmental accountability, these services are becoming increasingly valuable.

"Consumers are demanding more information about their purchases," says Duane Knowles. "Testing options now include evidence of fibre composition and environmental treatments during manufacturing."

"We provide services to cater for numerous accreditation programs around the world and maintain a close eye on developments so we can assist customers with understanding these requirements."

With wool markets increasingly focused on quality assurance, sustainability and transparency, independent testing organisations such as NZWTA continue to play a critical role in supporting confidence throughout the global wool and textile industries.



Q&A

With Angus Street, CEO Zentera Wool Company

The transformation of The New Zealand Merino Company into Zentera Wool Company marks far more than a simple rebrand. It represents the next stage in this company's evolution. For decades, New Zealand Merino Company built a reputation around premium Merino wool sourcing and supply. However, the global wool industry has changed significantly, and so too has the company. Today, Zentera operates across multiple wool-producing regions, sourcing not only Merino wool from New Zealand, Australia and South Africa, but also expanding into a broader range of certified wool types, including strong wools.

Victor Chesky *wool2yarn* editor, asked Angus Street, CEO at Zentera, what this evolution means in practice and how is it reshaping the wool trading platform for the new company.

Angus Street: Zentera represents who we have become and where we are heading. We have turned a page and are embracing a new chapter that better reflects the scale of our ambitions and the value we create across the entire wool supply chain. It is a bold commitment to create exceptional value for wool growers, manufacturers, brands, and consumers to become the world's leading wool company.

At its core, Zentera's mission is to help supply chain partners unlock greater value from wool.

For growers, this means stronger market access, long-term demand and recognition of responsible farming practices.

For manufacturers and processors, it means reliable supply, traceability and cost efficiencies through streamlined sourcing programmes.

For brands, it provides a credible sustainability story supported by measurable standards and consumer-facing certification.

And for consumers, it offers confidence that the wool products they purchase are sourced responsibly and transparently.

How do ZQ and ZQ+ fit into the new company structure?

Angus Street: ZQ and ZQ+ are central to the Zentera relaunch and are the flagships of our wool assurance programmes. These programmes are recognised globally as benchmarks for responsible wool production.

ZQ, established 20 years ago, is built on a foundation of animal welfare, environmental stewardship, fibre quality, social responsibility and traceability.



It provides brands and consumers with confidence that the wool has been produced to rigorous standards while supporting farming systems designed to protect both animals and the environment.

Building on this foundation, ZQ+ represents the next generation of wool certification. It focuses on regenerative farming, encouraging practices that enhance soil health, biodiversity, water quality and long-term farm resilience. By measuring outcomes, ZQ+ enables brands to connect with consumers seeking products that actively contribute to environmental restoration.

Together, ZQ and ZQ+ provide brands with powerful tools to communicate authenticity, sustainability and accountability in an increasingly competitive marketplace.

With wool supplies tightening, how does Zentera ensure security of supply?

Angus Street: While certification is important Zentera's value proposition extends far beyond a quality mark. Zentera works directly with farmers and wool growers across New Zealand, Australia and South Africa, creating a supply network that offers brands security, consistency and flexibility. By sourcing directly from farms and supplementing supply through certified auction purchases, Zentera can manage risk and provide dependable access to premium wool regardless of seasonal or regional fluctuations. To-date we work with more than 600 wool growers in main wool producing countries.

This multi-country sourcing strategy allows Zentera to offer something increasingly valuable in today's uncertain global marketplace: guaranteed supply and pricing stability.

We can achieve this through our long-term contracts, some extending up to ten years, which provide certainty for farmers, processors, manufacturers and brands alike. By giving all participants in the supply chain greater visibility and confidence, these agreements help reduce market volatility and create a more stable operating environment. This stability encourages investment in animal welfare, environmental stewardship, processing capabilities and product innovation, while supporting sustainable production practices. It also enables supply chain partners to plan confidently for future growth, secure raw material supply, and build stronger, more resilient businesses.

Transparency and traceability has become a critical requirement for global brands and consumers. Zentera has invested heavily in digital traceability systems that allow wool to be traced through the supply chain, providing clear visibility from farm to finished product.

Importantly, all wool sourced through Zentera comes from farms meeting internationally recognised standards, including Responsible Wool Standard (RWS) certification. Many participating farms also achieve the additional requirements of ZQ and ZQ+, providing an extra layer of assurance around animal welfare, environmental management and regenerative outcomes.

This depth of accountability has helped establish ZQ and ZQ+ as trusted quality marks among leading apparel and textile brands worldwide.

How do you see demand for wool going forward?

Angus Street: Zentera is entering this new chapter from a position of growth. The company continues to expand its network of strategic partnerships and affiliates throughout the global wool supply chain, working closely with brands to increase demand for certified wool.

Hundreds of brands are already sourcing from the ZQ programme, and new partners continue to join at a rapid pace. According to the company, a further 12 brands signed up over the past 12 months, highlighting the growing momentum behind responsible wool sourcing.

As global demand for traceable, regenerative and natural fibres continues to accelerate, Zentera believes wool is uniquely positioned to meet consumer expectations.

With a new name, an expanded sourcing platform, strengthened certification programmes and a clear focus on creating value across the supply chain, Zentera is not simply rebranding. It is redefining what a modern wool company can be—and helping shape the future of wool for generations to come.

SCOURED WOOL

More fibre Less waste Better value

WOOLWORKS

From farm to factory, and ultimately consumers around the world, WoolWorks New Zealand is helping wool buyers secure cleaner fibre, greater consistency and better value – backed by scale, technology and a new generation of leadership.

WoolWorks is the largest wool processor in the world, with an annual processing capacity of over 100 million greasy kilograms of wool, or 80% of the New Zealand wool clip. This scale provides a significant advantage at a time when global supply chains remain vulnerable to disruption and manufacturers are demanding reliable, just-in-time delivery.

Last year WoolWorks strengthened its position as a major supplier of high-quality scoured wool to global markets, by establishing WoolWorks Grower Direct, a wool brokerage service. 'This service combines our extensive processing capacity with direct relationships with New Zealand wool growers, and providing a sharper focus on what international buyers need,' says Rosstan Mazey Chief Executive.

'The initiative is designed to deliver improved financial returns to participating growers through a more direct and efficient model, while creating a platform to match wool specifications more closely with market opportunities. WoolWorks Grower Direct is nationwide, operating in both North and South Islands. Our wool stores are strategically located near our Wool Scouring plants in Timaru and Napier.

A younger generation is also joining the business, bringing fresh thinking and new ideas designed to strengthen WoolWorks' relationships with buyers in New Zealand and key international markets, including China.



Rosstan Mazey
Chief Executive, WoolWorks



Tony Cunningham
Group Assurance Manager
WoolWorks New Zealand Limited

Scour before you ship

For wool processors globally the case for purchasing scoured wool is increasingly compelling.

WoolWorks processes a wide range of wool types and works closely with exporters and processors to meet precise specifications and delivery schedules "For textile manufacturers, every kilogram matters. Purchasing scoured wool means paying for usable fibre rather than impurities. It reduces freight costs, improves processing efficiency and delivers greater value throughout the supply chain," says Mazey.

Scouring removes contaminants before shipment, producing a cleaner and more predictable wool quality. It can improve yield, simplify



subsequent processing and eliminate the need for customers to scour greasy wool locally.

"It also offers more predictable performance and faster production. It arrives ready for the next stage of manufacturing," Mazey says.

The logistics benefits are equally important. Scoured wool weighs substantially less than greasy wool, reducing freight requirements and associated carbon emissions. Buyers also avoid the cost, complexity and environmental compliance obligations involved in operating or outsourcing their own scouring facilities.

For manufacturers, the value of scoured wool extends well beyond freight savings. Advanced processing technology enables WoolWorks to deliver consistent fibre characteristics and precise blends. Computer-controlled blending systems and specialised wool-opening equipment allow individual orders to be tailored to customer specifications while maintaining strict confidentiality.

"We understand how important it is for our customers to receive wool that meets their exact requirements," says Tony Cunningham, Group Assurance Manager at WoolWorks. "Our processing methods ensure wool that is whiter, brighter and residue-free. Every blend is designed to deliver the consistency and performance our customers expect."

That consistency provides manufacturers with greater certainty over yield, processing performance and final-product quality – critical advantages when margins are under pressure.

Sustainability built into the supply chain

WoolWorks is also responding to the growing importance of sustainability, traceability and responsible sourcing.

The company supports recognised standards and programmes including the Responsible Wool Standard (RWS), Global Organic Textile Standard (GOTS), New Zealand Farm Assured Programme (NZFAP), Land to Market and other internationally recognised certifications.

"At a time when sustainability credentials are paramount, our investment in cleaner processes has reinforced New Zealand's position as a preferred source of high-quality scoured wool," Tony Cunningham comments.

For brands and manufacturers, this combination of traceability, certification and efficient processing is becoming an increasingly important part of purchasing decisions.

"This ensures New Zealand wool reaches global markets clean in fibre and clean in conscience. Brands and consumers increasingly expect both performance and sustainability, and our role is to help deliver both."

As the global wool industry faces tighter supply, rising logistics costs and increasing demands for transparency, efficiency and sustainability, the advantages of scoured wool are becoming harder to ignore.

"Most importantly, our customers know they are receiving 100% New Zealand wool. Our wool comes from non-mulesed, disease-free sheep, which is increasingly important for brands and manufacturers focused on ethical sourcing," Mazey concludes.

INDEPENDENT TESTING

Builds Commercial Confidence



The real value in buying wool lies in knowing exactly what will arrive at the mill and how it will perform throughout production. Independently tested wool provides that confidence, giving processors and manufacturers greater certainty, consistency and control. With quality assured, purchasing decisions can be based on more than price alone, delivering better processing outcomes and long-term commercial value.

SGS New Zealand has been providing independent wool testing for more than 60 years, helping buyers reduce uncertainty and make better informed purchasing decisions. Its laboratories are accredited to ISO/IEC 17025 and licensed by the International Wool Textile Organisation (IWTO) to issue internationally recognised test certificates.

For buyers, particularly those sourcing wool internationally, independent testing provides confidence that the fibre purchased matches the specification required. It allows purchasing decisions to be based on verified technical data rather than assumptions, reducing the risk of unexpected processing issues and costly production delays.

Scoured Wool Testing

'The greatest benefits are achieved with scoured wool. Unlike greasy wool, scoured wool can be Length After Carding tested, providing valuable information on predicted fibre parameters after processing,' says Jeremy Wear, SGS New Zealand. 'This data is particularly important for manufacturers of semi-worsted and woolen carded products, where consistent processing performance directly influences productivity and yarn quality.'

While greasy wool may appear less expensive at the point of purchase, the initial saving can quickly disappear. Additional transport costs associated with shipping moisture, dirt and vegetable matter, combined with scouring costs, waste disposal, environmental compliance and the absence of detailed processing data, all add to the true cost of ownership.

Testing Wools from Anywhere in the World

SGS offers one of the world's most extensive wool testing networks, with laboratories and inspection offices located throughout major wool-producing countries. Wool buyers can arrange independent sampling and testing close to the origin of the wool, ensuring representative samples and internationally recognised certification before shipment.

For customers in any wool growing region around the world, this service is supported by local SGS personnel who understand the market, speak the language and work directly with buyers to ensure testing requirements are met efficiently. Electronic reporting provides rapid access to results, allowing purchasing decisions to be made quickly and confidently.

'It doesn't matter where you grow wool or buy wool from, there should be an SGS office nearby,' says Jeremy Wear. 'We work with exporters and buyers around the world to arrange independent sampling and testing, providing reliable information that helps both parties trade with confidence.'

SGS testing covers all of the key characteristics required by commercial buyers, including yield, vegetable matter content, mean fibre diameter, colour, staple length and strength, bulk, fibre curvature, fibre diameter distribution, diameter-length profile and medullation.



Jeremy Wear

Jeremy Wear adds, 'Additionally, companies that purchase wool from multiple suppliers and countries will benefit from having a consistent certification format. Using SGS for testing across all sources simplifies staff training, streamlines implementation, and makes it easier to manage quality assurance throughout the supply chain.'

As supply chains place increasing emphasis on transparency and traceability, SGS continues to expand its certification services. 'For buyers of New Zealand wool, SGS test certificates can now incorporate the New Zealand Farm Assurance Programme (NZFAP), providing additional assurance in relation to animal welfare and farm traceability. Many Internationally recognised quality supply- chain verification and integrity certification systems are also available through the SGS group.'

Whether purchasing wool from Australia, New Zealand, South America or emerging wool-producing regions, independent SGS testing gives buyers greater certainty about fibre quality before production begins. In an increasingly competitive textile industry, verified information is not simply an added service—it is an investment that helps reduce risk, improve processing efficiency and achieve more consistent manufacturing outcomes.

CHILEAN WOOL TOPS

Traceability Quality and RWS Assurance

Buyers of Tops are increasingly demanding more than just fibre — they want quality, consistency, traceability, and environmental accountability. Chilean wool is naturally white, reducing the need for bleaching and enhancing dye uptake, making it highly attractive for fashion and interior textile applications.

'Chilean wool offers a unique combination of quality, sustainability and traceability that is increasingly valued by international textile manufacturers and brands,' says Paul Hughes of Standard Wool UK.

Standard Wool UK is the largest buyer of Chilean wool: we sell this both for greasy trading as well as continuing to support our European customers who buy our wool tops.

Known around the world as 'snow white' tops for exceptional whiteness, these tops offer spinners and weavers an additional supply option. A low CVH enables excellent spinning performance; consistent 80–90 HM staple length; and a wide merino micron range is availability (17.5–30µ). Most wool tops have RWS certification.

Chilean tops (Merino Range) are highly popular for machine knitting. They are ideal for lightweight knitwear, and in strong demand in fashion and premium apparel. They have excellent handle and softness.

The coarser micron Chilean wool tops are also widely used in hand knitting, upholstery and interior textiles. They are suitable for structured knit fabrics and are utilised in performance and contract markets.



'Chile has a strong sheep farming tradition, excellent natural grazing conditions and a reputation for producing reliable, well-prepared wool clip,' Paul Hughes continues.' The ability to offer a consistent micron spectrum allows buyers to work within one origin while covering multiple product categories.

'We have an established and structured traceable supply chain. The Chilean wool clip handled by our company is sourced from approximately 450 dedicated farmers and woolgrowers, forming a well-structured and transparent supply base.

'A significant majority of these growers are certified under the Responsible Wool Standard (RWS), ensuring high animal welfare standards; verified land management practices; full chain-of-custody traceability; and independent certification audits. That is why the majority of our wool top production is RWS certified,' Paul Hughes comments.

In 2025 Standard Wool UK launched PuntaPuro and PuntaPuroRG, which links the wool grower to the fashion end user, supplying full traceability from one origin and high-quality wool tops.

A video and brochure are available via our website for more information: https://standardwool.uk/puntapuro



Now online : Access SGS Wool Testing services online through webshop-nz.sgs.com

SGS Wool Testing is an IWTO licensed laboratory providing independent testing, inspection and certification that help wool growers, brokers, exporters, processors and manufacturers trade with confidence. Our internationally recognised testing services support quality assurance, market access and supply chain transparency.

Through our specialist laboratory in New Zealand and global SGS network, we deliver reliable wool testing services that support informed trading decisions and compliance with international market requirements.

- Raw wool testing and certification
- Core testing and sampling supervision
- Fibre diameter, yield and vegetable matter analysis
- Wool inspection and quality verification
- Shipment sampling and certification
- Independent testing for international trade

Contact us

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CHINESE CONSUMERS AFFINITY FOR MERINO WOOL

New consumer insights from Woolmark and Alibaba's Tmall Innovation Center (TMIC) show that Merino wool is moving well beyond its traditional winter strongholds. While its sales continue to outperform the broader apparel market, the more significant story is where that growth is occurring. Demand is expanding into sportswear, lightweight apparel and contemporary fashion, driven by younger consumers who increasingly view Merino as a high-performance, four-season fibre. For processors, manufacturers, brands and woolgrowers alike, the findings point to a broader and potentially more resilient demand profile.

More than 80% of the world's wool is processed directly or indirectly in China, while more than 88% of the Australian wool clip was exported there in the past season. China is also the world's largest consumer market for wool products, making the purchasing behaviour of Chinese consumers a critical driver of global wool demand. Their preferences increasingly influence woolgrowers, processors, manufacturers and brands across the entire supply chain.

A recent white paper released by Woolmark in partnership with TMIC draws on online sales data and consumer purchasing trends to reveal Merino wool is attracting new consumers, entering new product categories and establishing itself as a genuine four-season fibre.

Between July 2024 and July 2025, sales of Merino wool apparel on Tmall increased by 18%, outperforming the broader apparel market. Much of this growth was driven by a 13% expansion in Tmall's Merino wool consumer base, highlighting the fibre's growing appeal among Chinese shoppers.

Significantly, demand is no longer confined to traditional wool categories such as knitwear, tailoring and outerwear. Merino wool is gaining momentum across a much broader range of apparel, with activewear emerging as one of its fastest-growing segments.

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One of the strongest trends identified in the report is the rapid growth of Merino wool sportswear.

As participation in running, cycling, fitness and outdoor recreation continues to grow across China, consumers are increasingly seeking apparel that combines technical performance with everyday comfort. Sales of wool sportswear increased 58% year-on-year, while Merino wool sportswear surged by an impressive 119%.

Merino wool's natural breathability, moisture management, odour resistance and temperature regulation are positioning it as a premium fibre in performance apparel.

TMIC data also showed that the use of wool in fitness apparel has increased by almost 400%, demonstrating how quickly consumer perceptions are evolving. Merino wool is recognised as a high-performance natural fibre suited to year-round active lifestyles.

Fashion Trends Drive New Opportunities

Beyond performance apparel, Merino wool is also benefiting from changing fashion preferences.

The report highlights the continued rise of Guochao—a movement celebrating Chinese culture, heritage and contemporary local design. Within this trend, designers are increasingly incorporating wool into traditional garments such as Hanfu, with wool-based Hanfu products recording growth of more than 200%.

This evolution broadens Merino wool's appeal beyond luxury and functionality. Increasingly, Chinese consumers see the wool fibre as representing authenticity, craftsmanship and premium quality while fitting seamlessly into modern fashion.

A New Generation of Wool Consumers

Driving much of this growth are China's post-80s and post-90s generations.

Typically educated, urban and digitally connected, these consumers are concentrated in Tier 1 and emerging Tier 1 cities. They are more willing to invest in premium apparel that combines quality, innovation and contemporary design.

Importantly for the wool industry, they also place increasing value on natural fibres and product provenance.

These priorities closely align with the strengths of Australian Merino wool. Its reputation for exceptional quality, natural performance and renewability provides a compelling value proposition for consumers seeking authenticity alongside technical performance.

Building a Four-Season Fibre

Perhaps the report's most significant finding is the continuing shift in when consumers choose to wear wool.

Merino wool lightweight knitwear, T-shirts, polo shirts, hoodies and other trans-seasonal garments are driving demand throughout the year.

The white paper identifies four-season wear as one of Merino wool's greatest competitive advantages, supported by strong social media engagement showcasing its versatility across work, travel, sport and everyday lifestyles.

For the global wool supply chain, this represents an important structural shift. More consistent year-round demand has the potential to create a broader market for Merino wool products.

While the report focuses on consumer behaviour, its implications extend well beyond retail. China's expanding appetite for Merino wool across multiple product categories demonstrates that demand is diversifying rather than relying solely on traditional wool garments. For the global wool industry, this broadening of end-use applications has the potential to support more consistent year-round demand and strengthen Merino wool's long-term market position.

Australian Wool Innovation (AWI) is a not-for-profit enterprise that conducts research, development and marketing of Australian wool on behalf of about 60,000 woolgrowers that help fund the company. The Woolmark Company is the marketing subsidiary of AWI that focuses on fostering talent, developing new innovations, and helping businesses realise the benefits of Australian Merino wool.

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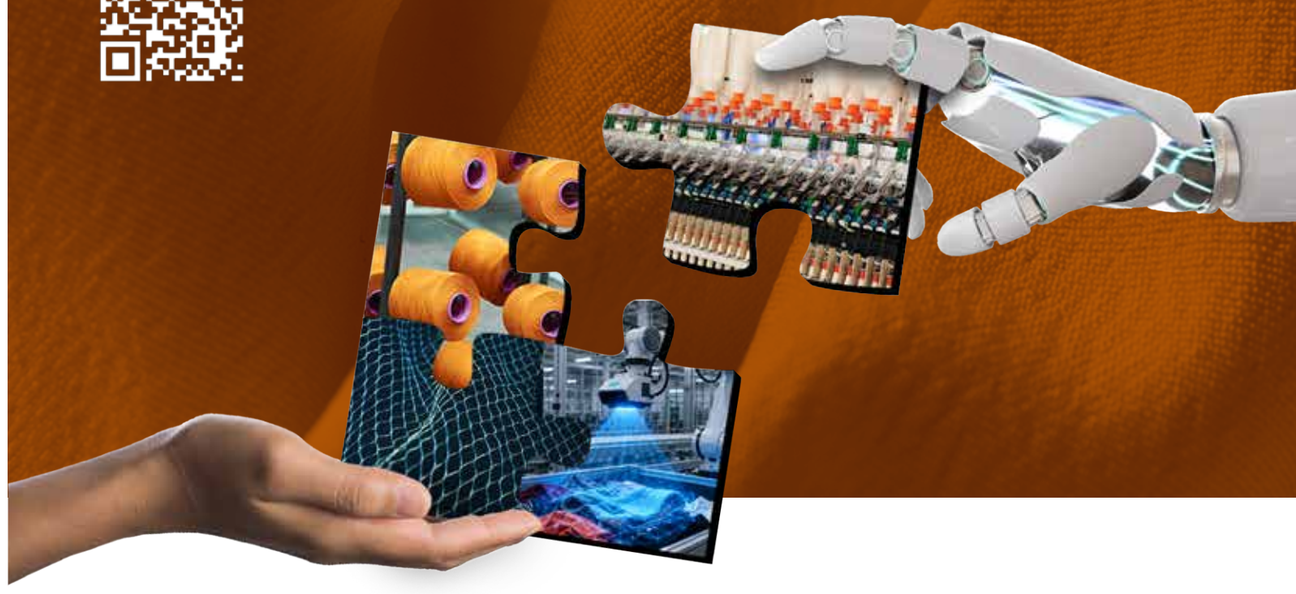

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ITMA 2027

Where Materials Meet Manufacturing



Every breakthrough in textiles begins with a material. But the industry's greatest opportunities are created when material innovation can be manufactured, scaled and adopted successfully.

Commercial success increasingly depends on how those materials integrate with manufacturing technologies, production processes and end-market applications.

From 16 to 22 September 2027, ITMA returns to Hanover, Germany, bringing together the global textile and garment manufacturing community on one integrated platform where innovators, manufacturers and technology providers explore the future of textile production.

From Material Innovation to Commercial Success

The textile industry's next wave of innovation is being driven by materials. As manufacturers respond to growing demands for sustainability, functionality, digitalisation and resource efficiency, fibres, yarns and fabrics are expected to do more than deliver performance. They must also support efficient production and create value across diverse applications.

For material producers, success increasingly depends on how effectively innovations integrate with downstream processes and end-use applications.

Whether enabling smart textiles, technical applications, lightweight composites or circular production, competitive advantage lies not only in developing new materials, but also in demonstrating how they can be produced, processed and adopted at scale.

This is where ITMA 2027 makes a difference. Bringing together material innovators, technology manufacturers and textile producers on one integrated platform, the exhibition enables companies to explore how new materials move from innovation to industrial application.

Emerging Opportunities in Advanced Materials

Responding to evolving market demand, ITMA 2027 has expanded its Fibres, Yarns and Fabrics profile to include:

New product categories

- Conductive yarns
- Smart textiles related manufacturing solutions

Expanding opportunities across

- Smart textile technologies
- Functional materials
- Advanced applications

These additions reflect the growing role of intelligent materials across fashion, home textiles, technical textiles and industrial applications.

Experience Technology in Action

One of ITMA's defining strengths is its large-scale live technology demonstrations. Rather than viewing materials or machinery separately, visitors can see how fibres, yarns and fabrics are transformed using production technologies operating under real manufacturing conditions.

From spinning and knitting to weaving, finishing and garment making, these live demonstrations provide valuable insights into manufacturing compatibility, process integration and product quality, helping companies better understand how material innovations perform at industrial scale.

With ITMA's manufacturers-only policy, visitors engage directly with the technology developers, engineers, and decision-makers behind the solutions, enabling more meaningful technical discussions and informed investment decisions.

Shaping the Future of Material Innovation

As the textile industry continues its transition towards smarter, more sustainable and increasingly connected manufacturing, collaboration across the value chain will become a key driver of future competitiveness.

For fibre, yarn and fabric companies, the future will be shaped not only by the materials they develop, but by how successfully those materials are adopted across global manufacturing.

ITMA 2027 brings these perspectives together on one global platform, enabling companies to explore new ideas, build strategic partnerships and identify opportunities that shape the next generation of textile manufacturing.



Join the Global Textile Community in Hanover

Whether your objective is to discover emerging technologies, benchmark global developments or position your material innovations for international markets, ITMA 2027 offers an unparalleled opportunity to connect with the global textile community.

Visitor registration opens March 2027. Learn more at www.itma.com

Interested in exhibiting?

Companies developing innovative fibres, yarns and fabrics can also explore exhibition opportunities within the expanded Fibres, Yarns & Fabrics sector at www.itma.com/for-exhibitor/exhibitors.

A Proven Global Business Platform for the Textile Industry

ITMA 2023 At A Glance

1,700+	111,000	> 60%	20
Exhibitors 47 Countries	Visitorship 143 Countries	of visitors were decision-makers, influencers or specifiers	Product sectors covering the complete textile and garment manufacturing ecosystem

OFDA TECHNOLOGY EXPANDS INTO HEMP, FLAX AND CELLULOSIC FIBRE RESEARCH



Objective measurement of fibre diameter and length has long been essential in the wool and cashmere industries. Similar measurement capabilities are now being explored for emerging natural fibres, such as hemp, flax and other cellulosic fibres.

'Hemp has become one of the textile industry's most closely watched sustainable fibres,' says Thomas Hegerty of Robotic Vision, manufacturer of OFDA fibre testing technology. 'It is increasingly being used in apparel, technical textiles, composites, insulation materials, automotive applications and nonwoven products.'

One of the key challenges facing hemp processors and researchers is the lack of widely adopted, standardised fibre measurement systems. Hemp fibres can vary considerably in fineness, length and processing performance depending on plant variety, growing conditions, retting methods and mechanical processing techniques.

'Researchers are investigating whether OFDA technology can provide objective and repeatable fibre analysis for hemp and other bast fibres,' says Hegerty. 'Reliable measurement data could help support quality assessment, product development and future industry standards.'

As commercial hemp production continues to expand globally, demand for objective fibre testing methods is expected to grow. Accurate measurement of fibre characteristics can help improve consistency, support research programs and provide greater confidence throughout the supply chain.

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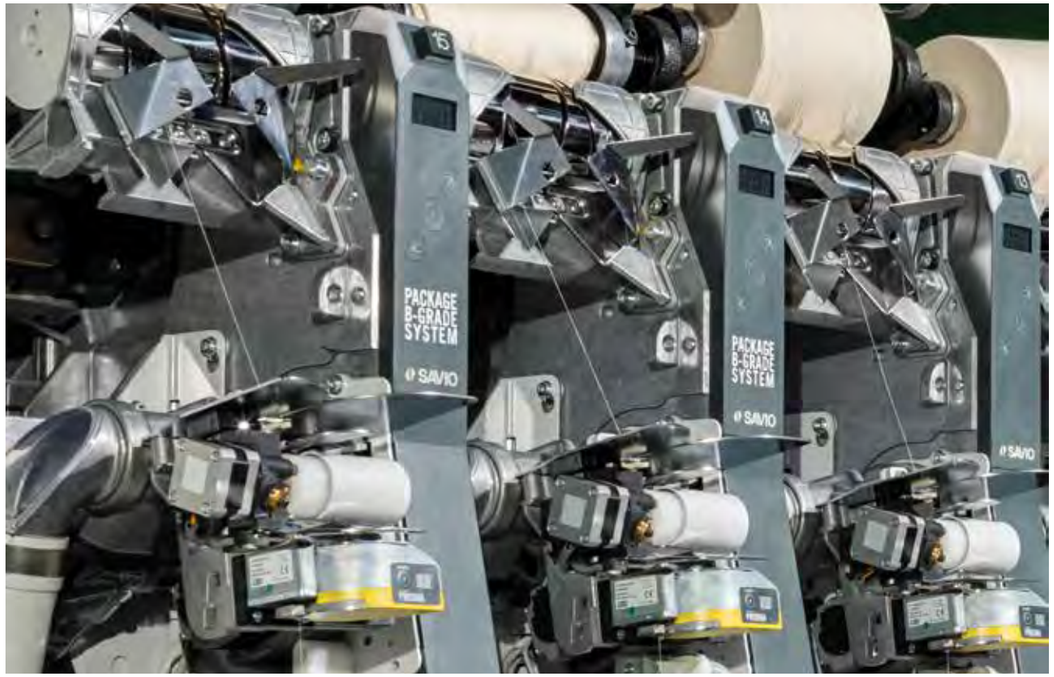


SAVIO SOLUTIONS FOR WOOL YARN PROCESSING

Wool and specialty fibre spinners have distinct machinery needs compared to spinners of other fibres. Savio, one of the largest manufacturers of textile machinery for winding and twisting, has long been a technological and innovation leader for natural fibres. The Italian company has consistently developed specialized solutions tailored to the unique requirements of the wool and specialty fibre sectors. Its winding systems support customers with the development of new applications in the technological evolution of yarns, and its spinning technology offers customized solutions and services to spinners and weavers worldwide.

Savio Proxima Smartconer® – Yarn winding solution

Savio Proxima Series is popular with wool and speciality fibre industry. Its design is set up for different feeding options suitable for each different fibre type. These can be fitted with bobbins from 200-350mm, self-acting, packages and remnant cones. A complete series of accessories is specifically designed for processing different types of wool, cashmere and carded fibre, semi-worsted, combed, and single and twisted yarns from a range of 4-150 nm. Savio Solutions on PROXIMA platform for wool yarn processing includes HEAT SPLICER technology combined with a heated chamber to allows the creation of reliable joints that are strong and aesthetic. This technology also works successfully with particularly difficult yarn, as well as various blends and high twists. The field of application of the Heatsplicer covers the whole range Nm 4-150.

Also available for wool and fine yarns, Savio is unique in its ability to offer a double motorized paraffin double WAXING device, designed to guarantee an even more uniform deposit on the yarn, so important for the knitting process. The PROXIMA "R" VERSION WINDER allows the rewinding of packages of any taper, producing packages ideal for any subsequent use.

Savio Polar Evolution® – Yarn winding solution

For the processing of coarse, fancy, and specialty yarns, such as bouclé, slub, soft-spun, linen, and other high-value-added yarns, Savio continues to offer the well established Polar Evolution winding machine, a platform recognized worldwide for its reliability, versatility, and excellent package quality.

Specifically engineered for coarse counts and yarns with irregular structures, Savio Polar is equipped with dedicated Heat Splicing technology and devices designed for the efficient handling of slubs, thick places, and other yarn irregularities, ensuring maximum productivity and superior package formation even in the most demanding applications.

The machine can process a wide count range, from Nm 1 to Nm 20, delivering consistent performance on natural fibers, blends, and fancy yarn constructions. Its flexibility is further enhanced by several feeding and winding configurations, including:

- 350 mm and 450 mm feeding bobbin length;
- Cone-to-cone winding configurations;
- Solutions for rewinding residual packages and remnants.

Thanks to its robust mechanical design and specialized technologies dedicated to the fancy yarn sector, Savio Polar Evolution remains a benchmark solution for manufacturers seeking outstanding winding quality, reduced waste, high operational efficiency, and maximum production flexibility.

B-Grade System in winders with automatic feeding (available only onto Proxima E and I)

Savio Proxima Smartconer® can be supplied with B-Grade system. A certain number of spindles can be reserved for winding bobbins with a few non-standard defects, rejected by the winding heads, producing small batches of "B series" yarn (hence B-Grade). This application is highly appreciated in fine and precious yarns because it allows them to produce small batches of yarn of different quality, in an economic and efficient way, to be used for less noble productions, such as yarn for selvedge or pieces for dyeing color samples.

Twisting machine, Sirius Duo Pot

Savio's Duo Pot system is the real direct twisting of overlapped packages; it can be considered an "all-in-one" assembling and twisting process. This allows a shortened production cycle by using standard conical packages. Consequently, the constant tension of unwinding two independent cones, the absence of tangles is ensured, reducing to a minimum the defects and irregularities of the twisted yarn. The yarn obtained on the Two-for-One Twister is generally more voluminous, more swollen and of better appearance. These features improve the downstream production process, that is, better wearability in knitwear and dye uniformity.

Savio Connectivity

All Savio machines are fully automated and can be controlled by one operator using a Smart Control Board. It uses a friendly touch screen interface and provides key data in real time, and easy setup parameters. Machines can be controlled remotely with Key Performance Indicators (KPIs).

Visit the Savio stand at ITMA ASIA+CITME SHANGHAI 2026 – Stand Number HALL 6.1 BOOTH C35

ITMA ASIA+CITME SHANGHAI 2026
Savio will be attending "ITMA ASIA+CITME 2026" exhibition, taking place in Shanghai, from 20 to 24 November 2026. Savio will be presenting winding solutions with Proxima Smartconer® and air-jet spinning solutions with Lybra Smartspinner®. We look forward to welcoming many visitors for unveiling our innovations.

NATURIQ GOTS EXP

for Modern Sustainable Textiles

Indorama Ventures Schoeller Austria has launched NATURIQ GOTS EXP, a versatile merino-hemp yarn platform developed for multiple industrial applications while meeting advanced sustainability standards. Created as a global stock service for customers worldwide, NATURIQ GOTS EXP combines 80% organic extra-fine merino wool treated with Schoeller's EXP technology and 20% hemp fibre.

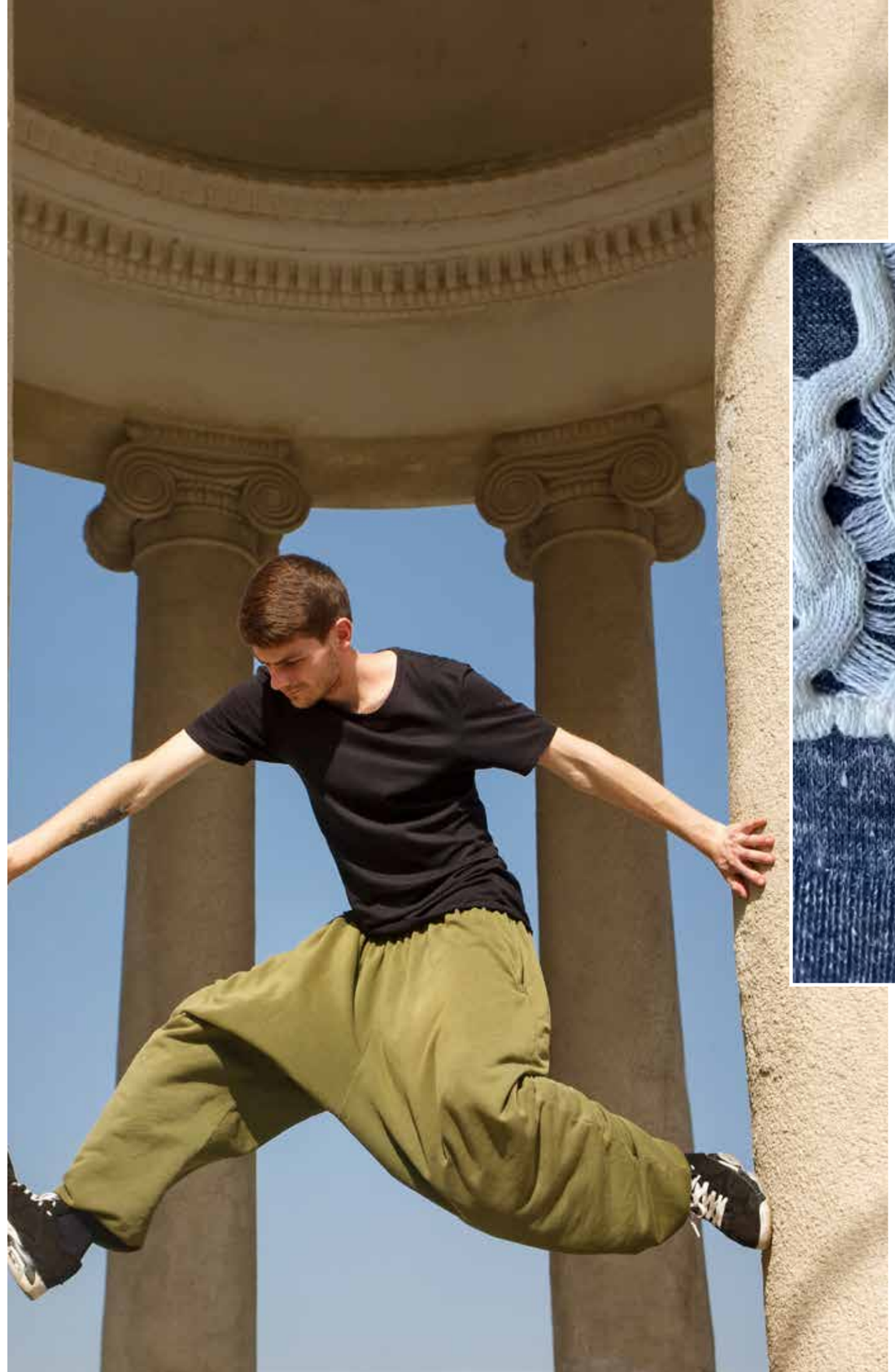
The yarn has been engineered as a highly adaptable solution suitable across different production technologies and product categories. Rather than sourcing separate yarns for different machinery or end uses, manufacturers and brands can work from one consistent, certified yarn with a modern approach to innovative textiles.

"It is perfectly suitable for flat knitting, circular knitting and hosiery production," says Marco Zaffalon, CEO Indorama Ventures



Marco Zaffalon

> ***"The yarn has been engineered as a highly adaptable solution suitable across different production technologies and product categories"***





Schoeller. "NATURIQ GOTS EXP directly addresses the growing market demand for sustainable, traceable and easy-care textiles."

By combining GOTS-certified organic 19.5 micron merino wool with EXP chlorine-free processing technology, the yarn delivers a high level of environmental accreditation while supporting more efficient and flexible manufacturing systems. The concept reflects the industry's growing focus on

modular textile solutions that can simplify supply chains and support faster production cycles.

The yarn is available in Nm 48/2 and Nm 48/1 in a wide range of natural melange colour palette.

The yarn is fully traceable from origin to finished fabric and offers machine washable, easy-care properties without harmful chemical residues. The EXP treatment technology also reduces pollutant emissions during processing, compared with conventional wool treatments. In addition, the yarn is completely naturally biodegradable and supports the growing global demand for renewable and environmentally responsible raw materials.

The incorporation of hemp further strengthens the yarn's sustainability profile. Industrial hemp is now cultivated commercially in around 30 countries and is increasingly recognised for its low environmental footprint. Hemp can be grown on poorer soils with relatively low agricultural inputs and does not compete directly with food production.

NATURIQ GOTS EXP 48/1 yarn delivers a distinctive sporty hemp aesthetic while maintaining the comfort, softness and performance associated with fine merino wool. Produced entirely in Europe, the yarn aligns with increasing market demand for traceable and responsibly manufactured textile materials.

This unique yarn offers cross-segment compatibility allowing mills, textile designers, and brands to streamline sourcing and product development while maintaining consistent sustainability standards.



About EXP Chlorine-Free Technology

Wool remains one of the world's most important natural performance fibres, but conventional wool finishing methods continue to rely heavily on chlorine-based treatments. Schoeller developed EXP — short for "EX-Pollution" — to eliminate the pollutants traditionally associated with wool finishing.

The globally patented EXP process enables machine washable wool without the environmental contamination associated with classic chlorine chemistry. By removing harmful pollutants from the finishing process, Schoeller significantly reduces water contamination and environmental impact while maintaining the performance standards required by modern textile markets.

The technology forms a central part of Schoeller's broader sustainability strategy, which focuses on premium organic and chlorine-free wool textiles for global apparel markets.

About Schoeller

Schoeller Yarns, a subsidiary of Indorama Ventures, produces approximately 3,500 tonnes of industrial yarn annually. With its head office is in Austria and production facilities in the Czech Republic and Poland, the company exports yarns worldwide and continues to expand its focus on environmentally advanced wool technologies.

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Sourcing and Processing



The foundation of all luxury textile manufacturing is exceptional fibre. From fine suiting and luxury knitwear, to coatings, home textiles and bespoke blends, manufacturers rely on partners who can deliver consistent quality, technical expertise and reliable processing from raw material through to finished product.

For more than 55 years, Seal International has excelled in that role. The company provides a fully integrated service, sourcing raw fibres from origin and processing them into premium tops and customised fibre solutions. Its portfolio includes Mohair, Alpaca, Silk, Cashmere, Camel Hair, Wool, Yak, and a range of other luxury and specialist animal fibres, such as Vicuña.

Supplying customers across Europe, Asia and America, Seal International has built a reputation for quality, reliability and technical expertise. Its client base spans luxury fashion houses, textile manufacturers, fibre traders and processors seeking premium natural fibres, with consistent performance and traceable origins.

From Raw Fibre to Premium Tops

At its Bradford mill, Seal International processes more than 60 tonnes of fibre each month, offering a comprehensive commission processing service from fibre procurement through to finished tops.

"As consumer demand for sustainable, traceable and natural products continues to grow, speciality fibres are playing an increasingly important role in premium textile collections," says Phil Seal.

"Our ability to source, process and customise fibre blends, gives customers a significant advantage. We work closely with spinning mills, weavers, knitters, and luxury brands to develop bespoke blends. These include combinations such as camel/silk, wool/yak and other specialist blends."

The Bradford mill supports full commission processing of loose fibres, converting them into tops or blended slivers tailored to exact customer requirements. It works with a wide range of natural fibres, including Mohair, Alpaca, Cashmere, Wool, Camelhair, Yak, Silk and Angora. Processing capabilities include blending, carding, combing, dehairing, gilling, cutting and breaking, with bespoke colour and fibre development available for specialist applications.





From left to right: Daniel Dyson, Phil Seal and Chris Williams

"Experience is central to our speciality fibre processing," says Daniel Dyson of Seal International. "While wool and mohair remain a key parts of our commission combing operations, fibres such as silk and cashmere require a higher level of technical expertise."

Clients can utilise the Bradford mill to process fibre to exact specifications, supported by specialist machinery designed for precision handling of luxury fibres. Seal International operates Schlumberger equipment, recognised for its performance in processing Mohair and other fine fibres, enabling efficient production across both small and large volumes without compromising quality.

"We also operate a dedicated Cashmere blending facility to eliminate contamination risks and ensure strict separation of white and darker fibres," Daniel explains. "Humidity and processing speeds are carefully controlled throughout to preserve fibre integrity and deliver consistent quality."

An on-site laboratory supports production with detailed fibre testing, including micron analysis, fibre length and quality assessment, ensuring consistency at every stage of processing.

Traceability and Certification

Traceability and responsible sourcing are integral to Seal International's operations. The company supports internationally recognised certification standards, including the Responsible Wool Standard (RWS), Responsible Mohair Standard (RMS), Responsible Alpaca Standard (RAS), Sustainable Fibre Alliance (SFA), Global Organic Textile Standard (GOTS) and OEKO-TEX®.

"For manufacturers, spinners, brands and traders seeking a trusted partner in luxury natural fibres, Seal International offers the expertise, flexibility and quality required in today's global market," concludes Daniel Dyson.

EXCLUSIVE BRITISH MOHAIR PROCESSING

Seal International holds the exclusive commercial rights to purchase and process British mohair, providing access to a rare fibre source with full traceability.

Although the British mohair clip is relatively small, it represents a distinctive niche fibre with strong quality characteristics. Processing takes place entirely at Seal International's Bradford mill, ensuring complete control over quality, consistency and traceability throughout the production chain.

For brands seeking provenance-led products, British mohair offers a clear point of difference.



British Angora goats, the source of the finest mohair fibre. Image: Steve Prentice, British Mohair Marketing.





WHERE IDEAS COME TOGETHER

CONNECTING PEOPLE AND PROCESSES ACROSS THE TEXTILE VALUE CHAIN

Everywhere you look, the world is continuously evolving – shaped by new technologies, changing expectations and the overall zeitgeist. So is the textile industry, where you can observe a clear shift towards exploring new approaches: from how fibres are developed, to the materials used and the increasing focus on their impact and responsibility, to how fabrics perform and how products are ultimately used. Advances in textile processing are opening up new possibilities, particularly when it comes to functionality and performance.

At the same time, these developments are creating new opportunities for closer collaboration across different stages of the value chain. What was once linear is becoming more interconnected and evolving step by step. Südwolle Group brings these elements together.

A shared process

As a spinner, Südwolle Group operates at the centre of the textile value chain by linking raw material, yarn, fabric and end application. This position brings with it a broad understanding of how materials behave across different stages of processing, and how decisions made early on influence the final product.

At the core of every development is the interaction between different perspectives. Designers, technicians and brands each approach a project from their own angle: creative direction, technical feasibility, application needs. Rather than working sequentially, development becomes a shared process. Questions are clarified collectively, adjustments are made with direct feedback, and solutions evolve through continuous exchange. This approach leads to more coherent results, where material, construction and application are aligned from the start.

Inspiring the use of wool

Beyond individual projects, there is a broader intention: to encourage new ways of thinking about wool, and to support future generations of designers, developers and technicians in exploring their potential with this versatile fibre.

These ways of working become visible in the Südwebs Innovation Hub. Rather than functioning as a traditional research and development unit, it acts as a collaborative space where ideas are explored in context. It also gives access to real samples, allowing a direct, tangible experience of the outcome or even bypassing the prototyping phase.

Reinventing a classic: wool denim

The most recent result of this approach is a wool denim fabric, developed in collaboration with Berto Industria Tessile, an Italian specialist in denim manufacturing. The starting point of this project was the integration of wool into denim while preserving its characteristic look and feel.

Denim has a strong identity and working with it required a careful balance: preserving what makes it recognisable while introducing new material qualities through the internal structure of the fabric, where different fibres interact in ways that are not immediately visible but become apparent in wear.

To address this, the team carried out the development in close collaboration across the value chain. Adjustments were made step by step, from yarn selection and fabric construction to finishing. Bringing cotton and wool together, required aligning two fundamentally different fibre systems, balancing structure, softness and performance within one coherent material.

During the process, technical parameters were refined, aesthetic aspects reconsidered and manufacturing constraints taken into account. This included defining finishing processes that accommodated both fibre types, as well as adapting yarn construction to meet the technical requirements of weaving.

By adjusting yarn parameters and fabric density, different qualities were created: lightweight for shirts and dresses, midweight for versatile everyday garments, and heavyweight for outerwear and trousers.

The outcome of this project shows the benefits of close collaboration, clearly bringing together wool and denim expertise to open up new possibilities within a familiar fabric. It reflects the significance of more interconnected development across the textile value chain, where shared knowledge and aligned processes shape future material solutions.



NOBLE & SPECIALITY FIBRES

An Insider's View from Biella

Like wool, speciality fibres possess unique qualities that synthetic fibres cannot replicate. When we speak of speciality fibres, we refer to rare and luxurious natural fibres, such as cashmere, camel hair, vicuña, alpaca, and mohair. Each year, Victor Chesky, *wool2yarn global* travels to Biella, Italy — a central hub for these fibres — to meet with Luca Alvigini of Alvigini Noble Fibres and talk about future directions for speciality fibres.

Alpaca



Luca Alvigini





Vicuña



Mohair

2025 presented challenges, but the market ended the year on a positive note. Despite the complexities of tariffs and trade policies under the Trump administration, the European market, particularly Italian weaving companies, demonstrated resilience. While knitters were affected by Chinese companies exporting cheap yarn to Europe, many fine fabric weavers continued receiving and fulfilling orders.

European knitters have been negatively affected by an influx of lower-cost Chinese yarn entering the European market. The increase in imports was partly driven by Chinese manufacturers seeking alternative markets after facing reduced access to the United States due to tariffs. This created significant pricing pressure for European producers, particularly in the knitwear sector.

In response, many European knitters have shifted their focus towards finer micron yarns and higher-value products, where quality, performance and technical expertise provide a competitive advantage over lower-cost alternatives. The move highlights the adaptability and resilience of Italy's textile sector, which has long been recognised for its ability to respond to changing market conditions through innovation, product development and a focus on premium manufacturing.

By the end of 2025 the prices for all raw materials increased, including wool and cashmere. The increase in cashmere was mostly due to devaluation if USD and big orders that came from large department stores in China. Many big Chinese brands purchased all available fibre to produce for the new season. From November 2025 to January 2026 there was basically no cashmere fibre stock left in China or Mongolia. Market prices increased from USD85 per kg to USD110 per kg.

Cashmere in China is of a better quality than Mongolia, in both micron and colour. Where previously there was a notable difference in price, today this difference is quite small.

Fashion brands in Italy increasingly feature darker colours in their collections. They prefer to buy this darker coloured cashmere, where lighter, whiter fibre was the preference in previous seasons. This has also contributed to the decrease in differences in price when comparing microns in each country.

Only dehaired cashmere can be exported from Mongolia. Chinese buyers have installed dehairing plants in Mongolia and after dehairing the fibre is exported to China.

Demand was quite strong in early 2026 so going forward there is an expectation that the market will continue to be in the supplier's favour. But I also feel that demand and supply are very close to equalizing.

It should also be pointed out that, domestically, major brands in China are more willing to pay higher prices for Chinese cashmere, so shipment of this fibre to Italy has decreased.

Chinese cashmere has been dropping in quality. One main reasons is that Chinese growers increasingly using shearing machines rather than hand combing. This makes the fibre harder to process as all hair, short and long, is mixed and this affects the quality of the clip. All in China encourage the use of shearing machines because it is quicker and cheaper, and as the growers have a lack of workers it is more productive. It is also true that goat farmers in China interbred different breeds of goat, reducing quality. In the last five years this practice by Chinese cashmere growers has resulted in a diminished quality in finest by at least 1 micron on average – it went from 15 to 16 microns.

Mongolia usually shears in April. It still uses traditional hand combing: more labour intensive, but better for fibre quality. As prices have doubled since Covid, it has been more profitable for Mongolian cashmere growers, despite the increase in production in this country.

Mohair is always in demand and the clip is small. It remains one of the smallest speciality clips, at just over 2 million kilograms annually. Processing is concentrated at two facilities, both in Port Elizabeth, South Africa.

The entire clip sells every year, with particularly strong demand for super kid mohair. Italian spinners purchase around 700 tons each year. Coarser microns, up to 35 microns, also sell well, and purchases are dominated by Chinese buyers.

Importantly, mohair has no true substitute, unlike alpaca or wool, which can be substituted for other fibres if prices rise too sharply. Demand in Italy, a key market, will remain steady.

Alpaca clip is more than 7 million kg and is increasing every year. The alpaca clip is going finer by 1-2 microns. On average, baby Alpaca is now 20-21 microns where before it was 22-23 microns. And what is more important is that there is more baby alpaca available every year. Last season saw strong demand for Alpaca yarn, particularly for both machine and hand knitting.

China continues to be a major buyer of alpaca fibre, particularly at the beginning of each season. Last season saw especially strong demand for Suri alpaca, reflecting a significant increase in its use. Traditionally used in woven textiles, Suri is also being increasingly incorporated into knitting blends due to its lustre, softness and drape.

This is a notable development given that Suri accounts for just less than 10% of the total alpaca clip. Despite prices reaching historic highs of around USD40/kg last season, demand remained strong and continues to be robust.

Scandinavian countries continue to be among the largest buyers of alpaca yarn, driven by a strong tradition of knitwear production, a preference for natural fibres and consumer demand for high-quality, sustainable textiles.



Alpaca fibre is particularly well suited to Nordic markets due to its exceptional warmth, softness and lightweight comfort, making it ideal for garments designed for cold climates.

Vicuña populations continue to grow, protected by conservation measures and lacking natural predators. The fibre's colour varies by region. Only three countries grow vicuña in commercial quantities: Peru remains the dominant producer, supplying around 80% of global output with mostly uniform brown fibre; Bolivia and Argentina are the sources for the lighter 'champagne' shades.

Only 20-25 tons are grown each per year. After dehairing, global availability is around 12 tons remaining. So this very limited clip is always in strong demand. Argentina and Peru sell their clip by private buying. Only Bolivia sells through auction.

Higher wool prices also tend to have a positive flow-on effect for speciality fibres, supporting stronger pricing across the sector. As wool becomes more expensive, manufacturers and brands often place greater value on other premium natural fibres, helping to reinforce demand and price levels for speciality fibres.

Looking ahead, Luca Alvigini expects demand for speciality fibres to remain strong, while production growth appears limited. With demand continuing to outpace any meaningful increase in supply, market fundamentals remain favourable and prices are expected to stay firm.

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Mini Spinning Line

A real ring spinning mill for the production of small lots of short or long staple yarn, for educational and R&D purposes, and for the spinning experimental tests with melange or recycled fibers.



Textile recycling

An innovative and sustainable solution for the mechanical re-cycling in the textile and fashion industry.



Laboratory Shredding Machine

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TESTING TO PROTECT VALUE IN LUXURY FIBRES

For luxury fibres such as cashmere, alpaca and superfine wool, precision testing is essential to ensure quality, consistency and value. Mesdan is an Italian testings solutions manufacturer offering several specialised solutions designed specifically for these high-value fibres.



Claudio Bertolotti
Mesdan sales Director

CLASSIFIBER is one of these solutions. It is a unique electronic instrument that automatically measures cashmere fibre length and length distribution. Following extensive performance evaluations, round-robin testing and comparison with traditional manual methods, the China Textile Testing & Certification Services (CTTC) approved the reference standard FZ/T 20028-2015 based on this technology. CTTC serves as the secretariat of the National Technical Committee on Textiles of the Standardization Administration of the People's Republic of China and acts as the Chinese mirror committee for ISO textile standards.



EVENEXT - the next generation evenness tester

EVENEXT is the next generation of Mesdan's evenness tester for all types of spun yarns, slivers, and rovings. Featuring a completely new design, mechanics, electronics, and software platform, it offers a modular configuration that can be upgraded with a hairiness sensor and an integrated automatic cop-changing system. Suitable for both short- and long-staple fibres, EVENEXT is particularly well suited to the testing of cashmere and wool yarns, delivering accurate and reliable quality control throughout the spinning process.

LIBECCIO and **SCIROCCO** ovens by Mesdan are available in semi-automatic and fully automatic versions respectively, providing precise determination of moisture regain and humidity content in accordance with international testing standards. As an alternative, Mesdan also offers Aqualab, which utilises innovative low-frequency microwave technology for rapid and accurate moisture analysis. Accurate moisture measurement is a critical requirement when handling expensive natural fibres.

Micro-Lab Advanced system is the Mesdan solution for detailed fibre examination. It provides sophisticated microscopic analysis capabilities. The instrument enables operators to measure fibre fineness, identify and analyse contamination, evaluate and compare fibre structures, capture images and measurements, distinguish fibres within blends, and determine blend composition percentages. These capabilities are particularly valuable for cashmere and wool processors seeking to verify fibre quality and blend consistency.

Rapid Oil Extractor is another valuable tool for luxury fibre processors. It enables quick determination of oil and grease content in fibres and yarns of animal origin, helping manufacturers monitor processing efficiency and maintain product quality.

Mesdan's Additional laboratory solutions are available for cashmere spinners, including instruments for measuring yarn count, tensile strength, elongation and twist. For knitters and weavers, Mesdan offers equipment for evaluating pilling resistance, abrasion performance, bursting strength, colour fastness and other critical fabric properties.

Mesdan's **JOINTAIR** and **HOT JOINTAIR** air splicers are particularly well suited to luxury animal fibres including cashmere.

HOT JOINTAIR is specifically designed for long-staple and worsted yarns, whether single or plied, regular, highly twisted or elastic.

JOINTAIR provides a versatile splicing solution for both short- and long-staple conventional yarns.

These splicers are available in automatic versions for integration with Savio automatic winders, as well as for downstream spinning operations and yarn dyeing processes. Through the ATS (Air Track Supply) system, they can also be installed on assembly winders, twisting machines, hank-to-cone winders and reeling machines. Additional applications include circular and flat knitting machines, warping systems and weaving creels.



Hot Jointair on reeling machine

Hot Jointair for Savio winders

By utilising Mesdan's advanced splicing technologies, manufacturers can achieve virtually 100% knot-free yarns and fabrics, improving appearance, processing efficiency and final product quality—an important advantage when producing premium cashmere, alpaca and fine wool textiles.

Contact sales@mesdan.it



SOUTH AFRICAN MOHAIR

Traceability and Luxury

Mohair South Africa plays a pivotal role in promoting and protecting the global reputation of South African mohair, working closely with manufacturers and brands that value premium quality, ethical production and supply chain transparency.

As one of the world's most prestigious natural fibres mohair is valued for its exceptional softness, durability, lustre and performance. Today, as architects, designers and consumers increasingly demand transparency and sustainability, the South African mohair industry provides verified traceability and partnerships with leading international manufacturers.

Lauren Moore, Head of Communications at Mohair South Africa says 'developed by Textile Exchange, the RMS provides independent third-party verification across animal welfare, social welfare, environmental practices, and chain-of-custody traceability. Transaction certificates pass from farmer to buyer to spinner, making the supply chain auditable at every stage. The standard is voluntary — and more than 80% of South African mohair farmers have chosen to comply.'

In 2026, MSA embarked on a year-long collaboration to begin building a unified scientific sustainability framework for the South African mohair industry. As the first step in a longer-term journey, the initiative brought together primary industry data, legislative and market intelligence, and a strategic roadmap to guide continuous improvement across the value chain.



Lindsay Humphries

'This initiative represents the beginning of a long-term journey for the South African mohair industry. By strengthening the scientific foundation that underpins sustainability decision-making, the industry is taking meaningful steps towards greater transparency, resilience, and continuous improvement as market expectations continue to evolve,' says Lindsay Humphreys, an independent Global Sustainability and Supply Chain Strategist.

Vescom Textiles

Dutch company Vescom Textiles BV manufactures premium velour interior textiles for the international contract market. Its love affair with mohair started in 2001 when it acquired the highly respected Dutch mohair weaving mill Schellens, now operating as part of the Vescom group of companies. Over the past two decades, the facility has grown into one of the world's largest and most advanced mohair upholstery mills.

Today the mill supplies high-end distributors and specification markets across the globe, with its products featured in luxury hotels, theatres, opera houses, cruise ships, restaurants and other prestigious public spaces.

'Mohair fibre is well suited to interior textiles,' says Frank van Werkum, Director at Vescom Group. 'Our mill supplies a wide range of upholstery fabric, all certified under the Cradle to Cradle label, making it the only factory in the world to hold this certification across its mohair upholstery range. The collection includes fabric with 100% mohair pile as well as mohair-silk and mohair-cotton blends. All products are woven on a cotton backing made from BCI-certified cotton.'

'At Vescom our entire production process is done under one roof—from weaving and dyeing to finishing. The mohair yarn we use



Lauren Moore

is sourced exclusively from our dedicated partners in South Africa.

'Architects and designers choose mohair for its sustainability, durability, acoustical performance, fire resistance, brilliant colors, seating comfort, its luxurious appearance, and, of course, its natural origin,' Frank van Werkum further comments.



William Halsted, Mock Leno (aka "Huckaback") Suiting Cloth.

'One of the great advantages our mill can offer is its exceptional flexibility. We can produce very small minimum order quantities (MOQs), enabling customers to launch extensive color ranges without the need for large inventory investments. This provides distributors and specifiers with a significant competitive advantage, allowing them to respond quickly to changing market demands while minimizing stock risks.

'We also provide fast turnaround times for both new color developments and repeat orders, and industry-leading service levels.'

Onyx fabric combines the natural luxury of mohair velvet with 16 striking two-tone colourways, created through the unique blend of 70% mohair and 30% cotton

'The premium velvet fabrics for curtain and upholstery applications can be found in projects around the world, demonstrating the global reach and reputation of the mill's mohair fabrics, evident in the lobbies of the Waldorf Astoria in Amsterdam, The Raeburn Hotel in Edinburgh, and Blå Station Stockholm, to name just a few,' Frank van Werkum continues.

'The characteristics of mohair that are highly valued include long-lasting easy-care, luxurious velvet-like handle, and natural lustre. Mohair is always associated with premium quality and exclusivity, with consumers appreciating its softness, warmth, durability and elegant appearance in and interior applications.'

Mohair in Worsted Fabric

As fashion brands continue to seek differentiation in an increasingly crowded marketplace, mohair is emerging as a fibre that offers both visual distinction and exceptional performance in worsted fabrics. Renowned for its natural lustre, resilience and elegant drape, mohair delivers a level of sophistication that sets it apart from conventional suiting materials.

For many designers in the world's leading fashion centres, mohair suiting represents a unique expression of luxury. While fine wool remains a staple of classic tailoring, mohair introduces a brighter, more refined appearance, with a natural sheen that enhances colour depth and fabric clarity. The fibre's ability to hold its shape and resist creasing also makes



Mohair upholstery fabric in production at Vescom Textiles

it particularly attractive for premium garments.

William Halsted, a leading manufacturer of mohair fabrics in the UK, has built a strong reputation for producing both 100% mohair cloths and mohair-wool blends. These fabrics are prized by bespoke tailors, luxury brands and fashion houses seeking fabrics that combine tradition, craftsmanship and contemporary style.

Traditionally, plain-weave mohair fabrics have been associated with spring and summer tailoring due to their lightweight handle, breathability and comfort. However, growing demand from high-end fashion houses in Italy, Paris, London and New York has helped position mohair as a truly seasonless fibre. Today, mohair fabrics are increasingly featured in ready-to-wear and tailored collections throughout the year.

Südwolle Group Explores the Potential of Fine Mohair Yarns

For Südwolle Group, the appeal of mohair lies not only in its distinctive lustre and handle, but also in its potential to be spun into surprisingly fine yarn counts.

Although mohair is generally coarser than fine Merino wool, with the finest qualities typically measuring around 24–25 microns, fibre diameter alone does not determine how fine a yarn can be produced. Mohair's naturally long staple length provides greater fibre overlap within the yarn structure, improving fibre cohesion during spinning and helping maintain yarn integrity at finer counts. This characteristic allows stable pure



Faenza 100% Mohair worsted yarn



Jacket produced from 100% mohair fabric combined with padding made from 100% recycled wool

mohair yarns to be produced for specialised applications.

The selection of raw material plays a critical role in achieving these results. Fibre diameter, staple length and consistency all influence spinning performance and the fineness of the yarn that can ultimately be achieved. Through direct sourcing relationships in South Africa, Südwolle Group is able to select specific lots of mohair that meet the demanding requirements of fine-count spinning.

Traditionally, fine mohair yarns have found their strongest application in weaving, particularly in premium velours for upholstery where the fibre's lustre, resilience and durability are highly valued.

Südwolle Group has also explored mohair's potential in innovative apparel concepts. One example developed through the company's Innovation Hub was a jacket produced from 100% mohair fabric combined with padding made from 100% recycled wool. The project demonstrated how mohair's durability, resilience and distinctive surface appearance can be successfully utilised in outerwear applications. More information on the Innovation Hub story - https://suedwebs.com/innovation/craft-meets-confidence/

More recently, Südwolle Group's product development activities have expanded into circular knitting, creating new opportunities and application areas for mohair-based yarns beyond their traditional markets.

Faenza is a 100% Mohair worsted yarn spun to Nm 40/1 from 25-micron mohair. The yarn shows how mohair's long staple length supports stable yarn construction and enables fine-count pure mohair spinning for weaving applications. Drawing on high-quality mohair fibres sourced from South Africa and Australia, Südwolle Group combines careful fibre selection with extensive spinning expertise.

Marino Nm 36/1 (60% RMS-certified Super Kid Cape Mohair, 30% Mulberry Silk, 10% RWS-certified Merino wool (19.3 micron). In this construction, the long staple length of mohair supports yarn formation, while the addition of silk and fine Merino wool contributes to fibre cohesion and processing performance in a fine-count yarn.

Chamois Nm 22.6/1 (80% RMS-certified Kid Mohair, 20% Silk) yarn relies primarily on the characteristics of Kid Mohair, particularly its staple length, which supports fibre control and cohesion within the yarn structure. The addition of silk complements the blend and contributes to yarn formation, resulting in a stable yarn construction despite the relatively fine count.



South African Mohair
BUILDS MOMENTUM IN 2026



Marco Coetzee, General Manager, Mohair South Africa

After a cautious start to 2025, the South African mohair market regained momentum and entered 2026 with renewed confidence, supported by stronger demand, higher prices and continued buyer preference for certified fibre.

While the 2025 winter season opened on a subdued note, with the market indicator falling by 5% at the first auction, sentiment improved quickly and prices recovered by 3% at the second sale. Competition among buyers strengthened throughout the season, helping deliver an impressive sales clearance rate of 95%.

By the close of the winter season, the average market indicator had reached R343.90/kg, an increase of 1.55% over the previous winter season. For the full 2025 calendar year, the average mohair price eased marginally by 1.83% to R357.72/kg.

Quality fibre continued to command premiums. The highest price achieved during 2025 was R950/kg for a bale of Super Style 25-micron kid mohair produced by Kobus Lotter of De Preezkraal Trust near Willowmore.

The real momentum emerged with the opening of the 2026 summer season. The first three auctions averaged 14.77% higher than the final sale of the previous winter season, reflecting robust demand and strong competition among buyers for the available clip.

Although the pace of gains moderated later in the season, market conditions remained firm. At the final auction of the summer season, the market indicator stood at R407.63/kg, while the season average reached R397.69/kg, up 7% on the corresponding period a year earlier.

The season also produced a series of record-breaking prices. A new South African record of R1,330/kg for a single lot of mohair was achieved on several occasions by producers Fred Colbourne and Michau Nortje of Willowmore, as well as Jordie van Hasselt of Prince Albert.

Changes in clip composition during 2025 were relatively modest. Kid mohair accounted for 19% of production, young goat mohair 28%, fine adult mohair 37% and strong adult mohair 16%. Compared with 2024, kid mohair volumes declined slightly while young goat production increased.

Topmakers remained the dominant buyers in the market, accounting for 82% of purchases during 2025, although this was down slightly from 84% the previous year. Greasy mohair buyers increased their market share to 18%.

Export demand remained strong. Total South African mohair exports, including greasy, scoured and tops, increased by 22% in volume to reach 3.4 million kilograms during 2025. Mohair tops continued to dominate shipments, accounting for more than 95% of exports.

China retained its position as the largest destination market, purchasing 53% of South African exports, followed by Italy with 26% and Taiwan with 6%.

Production also moved higher, with volumes offered through the official auction system increasing by 3.81% to 2.207 million kilograms. Total South African mohair production rose by 3.85% to approximately 2.7 million kilograms.

Sustainability continues to shape buying decisions across the supply chain. During 2025, 85% of all mohair sold through the official auction system was certified under the Responsible Mohair Standard (RMS). Significantly, the RMS market indicator finished the summer season 8.65% higher than the non-certified indicator, underlining the premium buyers are willing to pay for responsibly produced fibre.

South Africa maintained its position as the world's largest mohair producer during 2025, accounting for 58% of global production, ahead of Lesotho with 15%, and Turkey and Argentina with 7% each.

With improving production, resilient demand and record prices for premium fibre, the South African mohair industry enters the second half of 2026 with a considerably more positive outlook than many expected at the start of last year.





Rob Connacher founded AJR Connacher in 1971 - pictured during his early training in Germany

MOHAIR AND WOOL FOR EUROPEAN BUYERS

Connacher Wool & Mohair is extending its supply offering to European and Asian processors and manufacturers with a comprehensive range of South African mohair and wool. The company's product range includes greasy mohair, scoured mohair, mohair tops, greasy wool and processed wool, allowing customers to source multiple natural fibres from a single supplier.

Based in Gqeberha (formerly Port Elizabeth), at the heart of South Africa's mohair-producing region, Connacher provides direct access to some of South Africa's finest wool and mohair.

"Our company is a registered buyer with the South African Wool and Mohair Buyers Association (SAWAMBA), enabling us to purchase greasy mohair and wool at local auctions. We can also process wool and mohair that are required scoured or in tops," Alice Connacher said.

"We are proud to offer both Responsible Mohair Standard (RMS) and Responsible Wool Standard (RWS) certified fibre, giving our customers confidence in the traceability and sustainability of their raw materials."

European textile manufacturers have long regarded South African mohair as the global benchmark for quality, valued for its exceptional lustre, strength, softness and consistency. Connacher offers buyers an independent and reliable source of premium fibre, with the flexibility to supply both large commercial orders and smaller lots.

"Offering both mohair and wool is a real advantage for many of our customers," Alice said. "Our size also enables us to supply smaller lots, whether in scoured fibre or tops, which is particularly valuable for companies developing new collections, sampling or specialised production runs."

Beyond supplying fibre, Connacher works closely with manufacturers seeking to introduce mohair into existing collections or develop innovative new products.

"We're happy to share our knowledge with companies that are new to mohair as well as those already using the fibre. Mohair blends exceptionally well with wool, cotton and other fibres, opening opportunities across luxury apparel, suiting, knitwear, upholstery and premium interior textiles."

As demand continues to grow for sustainable, traceable natural fibres, Connacher Wool & Mohair is well positioned to support buyers worldwide with premium South African mohair and wool, backed by decades of industry experience and personalised service.

For further information, contact: Alice Connacher alice@connacherwool.com



OFDA

Advances Cashmere Testing

China and Mongolia are the largest producers of cashmere fibre and OFDA technology is playing an increasingly important role in supporting growers, processors, exporters and research laboratories working with this luxury fibre.

'Cashmere buyers use OFDA testing during raw fibre procurement to accurately determine fibre fineness and consistency. Objective testing enables more transparent pricing systems and reduces disputes between sellers and buyers,' says Thomas Hegerty at Robotic Vision, manufacturer of OFDA technology.

'Even small differences in micron can significantly influence fibre value. OFDA results help establish fairer commercial transactions throughout the supply chain.'

'In recent years, we've seen cashmere growers pool their resources to invest in OFDA2000 instruments for factory fibre measurement,' adds Hegerty. 'Once they start using the OFDA for high volume testing, the instrument quickly pays for itself, with the cost per test becoming extremely low.'

The latest OFDA2000 model is more compact and portable than earlier versions while delivering exceptional testing speed and accuracy. The instrument can automatically measure up to 20,000 fibres in just 30 seconds and also has the capability to measure unwashed greasy fibres. This provides not only an average micron reading, but also detailed information on how fibre diameter changes throughout the year — valuable data for breeding programs and animal management strategies aimed at improving fibre quality.

OFDA diameter testing is conducted in accordance with IWTO-47, the internationally recognised testing standard. This ensures laboratories around the world to follow consistent methodologies and achieve reliable, comparable results.

OFDA technology is also of benefit to cashmere top makers. The OFDA4000 is the first instrument in the world capable of simultaneously measuring diameter and length in slivers and tops. Designed for use in topmaking mills and research institutes, and by industry arbitrators, this lab-based instrument offers a user-friendly experience and delivers real-time results. It is the only system that directly measures diameter, length, hauteur, and barbe in a single operation.

Research institutions and agricultural organisations working with cashmere fibre also utilise OFDA technology to support genetic improvement programs aimed at producing finer cashmere fibres. By objectively measuring fibre characteristics from different goat populations, breeding strategies can be developed to improve long-term fibre quality while maintaining herd productivity.

This is strategically important as each country producing cashmere works to position its cashmere as both premium and responsibly produced.

Continued investment in fibre-testing infrastructure and laboratory capability will further strengthen competitiveness against other producing countries while supporting higher-value exports.

As international luxury brands demand greater assurance regarding fibre specifications, OFDA-generated data has become an important component of export documentation and quality certification when exporting to Europe, USA, Japan and other premium markets.

In an industry where fractions of a micron can influence market value. OFDA technology has become far more than a laboratory instrument — it is now a critical component of quality assurance, international trade and the future development of the global cashmere sector.

For more information please contact info@ofda.com

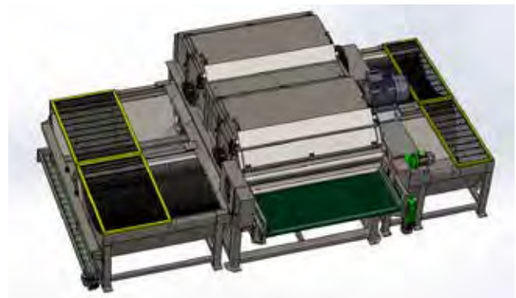


OFDA2000 mini portable - can be used at farm, from the back of a truck on any terrain, or at the processing mill. A number of countries have been introducing this equipment to growers of wool, alpaca, cashmere, and mohair to increase testing at the farm level

EFFICIENT PREPARATION OF GREASY WOOL

For wool processors, effective removal of contaminants prior to scouring is essential. Tecnomeccanica's greasy wool beater is designed specifically to prepare raw wool for efficient washing. The machine incorporates a two-drum cleaning system that gently opens the fleece while removing topsoil, stones, vegetable matter and other coarse impurities before the wool enters the scouring line.

Large rotating cylinders loosen and clean the fibre, while self-cleaning grids equipped with sliding scrapers maintain consistent performance throughout operation. An integrated screw conveyor continuously removes collected contaminants to a discharge container, ensuring uninterrupted production.



By opening and loosening the fleece before washing, the system improves washing efficiency while helping processors achieve cleaner wool and more consistent results.

All greasy wool beaters are designed and manufactured byTecnomeccanica in Biella, Italy.

MONGOLIA LEVERAGES

Natural Cashmere Colour Advantages

By: Mainbayar Badarch

Mongolia is seeking to capitalise on one of its unique competitive advantages—the wide range of naturally coloured cashmere produced by its goat population. While most cashmere-producing countries offer only two or three natural shades, Mongolia produces five principal natural colours and is promoting these as a key selling point, particularly in the European market.

As part of this strategy, "Mongolian Cashmere with Protected Geographical Indication (PGI)" has been officially registered and certified by the Mongolian Intellectual Property Office. The initiative aims to strengthen the reputation, value and international competitiveness of Mongolian cashmere.

The certification covers five naturally occurring cashmere colours: natural white, ecru, steel grey, camel and charcoal. To support the geographical indication registration, the Mongolian Wool and Cashmere Association (MWCA) conducted extensive research into goat breeds and fibre colours in collaboration with the Sense-Tex Laboratory at the Department of Advanced Fiber Materials Research, Kyoto Institute of Technology, Japan.



By formally linking production to its geographic origin, the PGI framework enhances traceability while providing scientific validation of the unique qualities of Mongolian cashmere. Following this milestone, MWCA plans to pursue official PGI recognition in the European Union, further develop industry standards and undertake long-term international marketing initiatives.

Altantsetseg Duger, Executive Director of MWCA, told *wool2yarn:* "Our country alone exports cashmere to more than 30 countries around the world, generating sales of MNT1.5 trillion (US$415 million) annually. The Chinese market has also imported a total of 100 million pieces of cashmere products, indicating that there is significant potential in our southern neighbour's market."

She added: "Our goal is to double the current level of total sales to US$1 billion (MNT3.5 trillion) by 2028. At the same time, it is expected that the number of employees in the industry will increase to 25,200, the volume of knitted products will increase to 8.0 million pieces, and the average utilisation of production capacity will increase to 60–80%."

According to Mongolia's General Authority of Customs, the country exported 4,000 tonnes of combed cashmere worth US$330.6 million in 2025, representing a 5.7-fold increase compared with 2024.

Strengthening Links with Italy

In December 2025, MWCA signed a memorandum of understanding with Italian state development finance institution Cassa Depositi e Prestiti (CDP) to attract investment into Mongolia's cashmere industry. The partnership aims to create new financing opportunities for advanced technologies, particularly the modernisation of spinning equipment, establishment of joint ventures, workforce development and support for small- and medium-sized enterprises.

Further strengthening ties, Mongolia hosted the "Italy–Mongolia Business Opportunities and Perspectives in the Textile Machinery Sector workshop in Ulaanbaatar in June. Organised



in collaboration with the Italian Trade Agency and the Association of Italian Textile Machinery Manufacturers, the event sought to build long-term business partnerships between companies from both countries.

Thirteen leading Italian textile machinery manufacturers participated, including Bigagli Proxima, Stalam, Fadis, Mesdan, Cormatex, Pinter Group, Biancalani, Color Service, Lawer, Bianco, Tecnomeccanica Biellese, Nuova Cosmatex and Ugolini, with delegates holding a series of B2B meetings with Mongolian manufacturers.

During the event, DBM Leasing LLC, a subsidiary of the Development Bank of Mongolia, also met with SACE, Italy's state export credit agency, to discuss investment conditions and financing options to support the introduction of advanced Italian textile machinery and technologies into Mongolia's cashmere industry.

Local Companies Expand

Mongolia's leading processors are also reporting strong growth. Ariunaa Byambakhuu, CEO of Goyol Cashmere, said, "Our exports of combed cashmere and cashmere garments increased by 45% and 20%, respectively, in 2025. For the sector, workforces reached 10,000, of whom 80–90% are women."

Alongside established manufacturers, smaller innovative companies are developing new applications for cashmere.

Capra, for example, produces insulated jackets filled with 50% cashmere and 50% recycled cashmere. Combining sustainable materials with technologies such as Gore-Tex and Omni-Heat, the company is developing performance apparel that blends comfort with technical functionality.

Capra is also developing three-dimensional cashmere materials for use as insulation in outerwear. Beyond the domestic market, the company has negotiated with international hiking brands and secured supply agreements with two major global brands for its innovative cashmere insulation materials.



Francesco Tesolin
SAVIO Regional Sales
Vice President for Mongolia

"Mongolia's cashmere industry is entering a new chapter where precision, consistency and production intelligence define competitiveness. Working closely with local mills, I see how Savio technologies — especially the PROXIMA Smartconer® winding platform — help transform exceptional raw fibre into premium yarns ready for global markets. Savio is proud to support this momentum with reliable, highperformance solutions tailored to the delicate nature of cashmere and to the ambitions of Mongolia's spinners"



CHINA'S CASHMERE INDUSTRY

Moves Upmarket Amid Tightening Premium Supply

China's cashmere industry is undergoing a significant transformation as the emphasis shifts from volume to quality, traceability and value-added production. While the country remains the world's largest processor of cashmere, tightening supplies of premium fibre, changing government policies and evolving international market requirements are accelerating investment in finer fibre production and vertically integrated supply chains.

Inner Mongolia Drives Premium Production

China's cashmere is produced primarily in Inner Mongolia, with smaller volumes coming from Gansu, Ningxia, Tibet and Xinjiang. Inner Mongolia accounts for around 40% of the country's total output, with Ordos recognised as the industry's leading production centre.

The Ordos region is home to more than 6.9 million cashmere goats and produces over 3,500 tonnes of raw cashmere annually—representing 59% of Inner Mongolia's production, 25% of China's output and approximately 15% of global raw cashmere production.

Today the city manufactures more than 10 million cashmere products each year, making it the world's largest production base for premium cashmere fibre and finished products. During 2025, seven Ordos cashmere companies signed procurement agreements worth CNY427 million (US$63 million) with domestic and international partners, including Italian luxury cashmere brand COLOMBO together with leading Chinese processors Consinee and Zhejiang Xinao. The contracts cover the entire supply chain, from raw fibre procurement through to luxury finished garments.

Erdos Rewards Fibre Quality

One of the industry's major integrated manufacturers is the Erdos Group, whose premium procurement programme has become a model for improving fibre quality while increasing returns for herders.

The company's purchasing system now supports approximately 4,000 pastoral households annually across Inner Mongolia and Tibet. Since its introduction in 2019, the average fibre fineness of cashmere purchased by Erdos has fallen by between 0.5 and one micron, reflecting substantial improvements in breeding.



During the same period, fibre finer than 14.5 microns has increased to 32% of procurement, while cashmere finer than 15 microns now represents 53% of purchases.

The programme operates in major producing regions, including Etuoke Banner, Alxa League and Tibet, rewarding producers according to fibre quality rather than production volume. After combining company incentives with government subsidies, the highest-quality cashmere can attract prices up to 2.7 times prevailing market levels.

The result has been a fundamental change in production practices, encouraging producers to focus on genetics, animal management and scientific breeding rather than simply increasing flock numbers.

Government Supports Premium Fibre

In April, authorities in Ordos introduced additional measures to accelerate the development of the premium cashmere sector, focusing particularly on expanding premium procurement and storage systems for Albas cashmere.

Financial incentives are available to enterprises purchasing and storing premium fibre, while all buyers are now required to comply with national grading standards. Mixed-grade purchasing and price suppression practices are specifically prohibited, and comprehensive traceability records must accompany raw cashmere purchases.

At the same time, Ningxia introduced similar measures, promoting standardised grading at both farm and purchasing levels.

Together these policies reinforce a simple market principle: higher quality attracts higher prices.

The premium paid for white cashmere finer than 15.5 microns has continued to widen relative to mixed and coarser grades. As a result, traders increasingly concentrated purchases on premium fibre during the spring buying season, while lower-grade cashmere attracted little speculative buying and experienced declining market liquidity.

Premium Fibre Becomes Increasingly Scarce

By mid-April, China's raw cashmere market had become sharply divided.

According to market transaction data, premium Inner Mongolian white cashmere measuring 15.5 microns or finer averaged CNY386/kg (US$57), representing a 2.3% increase from March. Prices for elite fibre finer than 14.5 microns rose by more than 3%.

Conversely, mixed and coarse grades above 16.5 microns declined by around 1.8%, with prices in some producing regions continuing to weaken.

Industry surveys released in April suggested production of premium white cashmere in Inner Mongolia and Ningxia would decline modestly because of ecological grazing controls and breeding conservation programmes.

Xinjiang, however, is emerging as an increasingly important supplier. Spring cashmere production is expected to increase by around 3.5% year-on-year, while expansion of larger commercial goat farms has increased the proportion of fibre measuring 15.5 microns or finer by more than five percentage points.

Qinghe Strengthens Its Position as China's Cashmere Capital

Although Inner Mongolia dominates fibre production, Qinghe County in Hebei Province remains China's principal processing and trading centre.

Known as the "Cashmere Capital of China", Qinghe has developed a complete industrial chain covering fibre trading, sorting, dehairing, spinning, garment production and international marketing. Raw cashmere sourced from Inner Mongolia, Xinjiang and Ningxia is traded and processed in Qinghe before being supplied to domestic manufacturers and export markets.

Each year the region processes approximately 8,000 tonnes of cashmere and more than 50,000 tonnes of sheep wool, accounting for around 60% of China's cashmere processing and 90% of its wool processing. Industry revenue exceeded CNY52 billion last year, with local authorities targeting long-term development into a trillion-yuan industrial cluster.

Qinghe products are exported to more than 30 countries, including Italy, Germany and France, with many local companies supplying internationally recognised luxury brands.

Hebei Yuteng Cashmere Products Co. Ltd, for example, supplies companies including Loro Piana, Cariaggi Lanificio and Zegna Baruffa Lane Borgosesia in Italy; Z. Hinchliffe & Sons and Johnstons of Elgin in the UK; and Toyoboshi Kogyo and Fukaki Woollen Textile in Japan.

Earlier this year, six Qinghe companies participated in Milan Fashion Week, where they promoted their brands and established new commercial relationships.

"We never expected that our first time participating in Milan Fashion Week would result in a US$500,000 letter of intent and contact with 17 clients from countries such as Italy, France and the UK," said Feng Fuqiang, General Manager of Daimengde Plush Products Co. Ltd.

The delegation also signed a cooperation agreement with an Italian fashion institution to establish the Qinghe Cashmere Design and Exhibition Center, appointed Mario Boselli, President of the Italy-China Council Foundation, as chief consultant, and concluded a strategic cooperation memorandum with the Italy Milan Fashion & Design Association.

Mongolia's Policy Reshapes Supply

China's industry is also adapting to significant changes in regional raw material supply.

Mongolia has now fully implemented its ban on exports of raw cashmere, permitting only combed, dehaired fibre to enter China through formal trade channels. The move has fundamentally altered the economics of the regional supply chain.

Smaller Chinese combing mills and traders that traditionally relied on Mongolian raw fibre now face restricted supplies and substantially higher procurement costs. Longer delivery times and increased prices for imported dehaired cashmere have encouraged larger processors and export brands to source more premium domestic fibre.

Over time, this is expected to accelerate the transition from the traditional "Mongolian raw cashmere plus Chinese processing" model towards greater reliance on high-quality Chinese fibre supported by more integrated domestic processing.

The result has been further tightening of premium white cashmere supplies while strengthening the bargaining position of China's major producing regions.

At the same time, export manufacturers increasingly require traceability, standardised grading and verified quality rather than simply seeking the lowest-priced raw material.

Larger Processors Extend Their Lead

According to the China National Textile and Apparel Council, China processes more than 60% of the world's cashmere raw material. However, competition is increasingly focused on premium manufacturing, design capability and brand value rather than processing volume alone.

Leading large-scale dehairing and combing mills continue to operate above 85% capacity, supported by export contracts and long-term supply agreements with downstream brands. These companies are securing premium fibre through forward purchasing and strategic partnerships with producers.

By contrast, many smaller processors are operating below 40% capacity and producing mainly against confirmed customer orders, resulting in further concentration of raw material purchasing among the industry's largest companies.

China Customs data illustrates the sector's continued export growth. During the first four months of the year, total imports and exports of cashmere raw materials and finished products reached US$514 million, an increase of 14% year-on-year.

Exports totalled US$417 million, up 9.2%, including:

- Combed cashmere: US$104 million (+19%)
- Cashmere yarn: US$157 million (+1%)
- Cashmere sweaters: US$127 million (+17%)
- Cashmere scarves: US$21 million (-8%)

The figures underline the continuing evolution of China's cashmere industry towards higher-value products, improved fibre quality and greater supply chain integration. While premium raw material remains increasingly scarce, China's leading producers are positioning themselves to capture greater value through quality, traceability and stronger international brand partnerships.



Eric Fessler
Commercial Director
NSC Group

"As one of the world's most valuable and delicate natural fibres, cashmere requires advanced processing technology that preserves its exceptional softness, fibre length and premium quality throughout manufacturing. NSC Group offers cashmere manufacturers a comprehensive range of processing and spinning machinery from NSC, Cognetex and Sant'Andrea, providing solutions tailored to every stage of production"



Mario Ploner
CEO Tecnomeccanica
Biellese Biella

"We work closely with leading cashmere processors around the world to develop and install customised solutions. From fibre preparation through to efficient processing, our textile machinery is designed to maximise quality, yield and productivity. As Mongolia and China expand cashmere processing capacities, manufacturers can benefit from our extensive experience, technical expertise and comprehensive range of machinery for every stage of cashmere preparation"

ADVANCED *Cashmere Testing*



NZWTA South America representative Nick Williams (left) and David Alexander examine sample wool fibres at NZWTA's accredited laboratory in Napier New Zealand

International trade in noble fibres is quality-focused, and accurate objective fibre testing has become essential throughout the supply chain for cashmere and alpaca. Consistent, internationally recognised testing provides growers, exporters, traders and processors with greater confidence in fibre quality, processing performance. and product consistency.

The New Zealand Wool Testing Authority (NZWTA) plays an important role in supporting the global alpaca and cashmere industries through internationally accredited fibre testing services. NZWTA tests wool, alpaca, cashmere and other speciality fibres from around the world using IWTO-accredited laboratory systems and internationally recognised testing standards.

According to David Alexander of NZWTA, increasing commercialisation of speciality fibres is driving stronger demand for reliable and transparent testing services. 'Processors, spinners and weavers need confidence about how fibres will perform during processing, while growers and exporters benefit from accurate and internationally recognised fibre testing,' David Alexander says.

International Sampling and Testing Support

NZWTA works with growers, exporters and industry organisations across multiple countries, including South America, where cashmere, alpaca, and other speciality fibre industries continue to grow. The organisation has designated sampling agents and Spanish-speaking partners in key production regions, helping simplify communication, sample collection and logistics for international customers.

'We have designated samplers in many countries in South America to take samples for certified testing,' explains David Alexander. 'Samples are securely shipped to our IWTO-accredited laboratory in New Zealand for comprehensive analysis, and customers can contact NZWTA for a customised process.'

This international capability is particularly valuable in regions where maintaining fully accredited local fibre testing laboratories may not be commercially viable. NZWTA provides a practical pathway for growers, exporters and processors to access world-class testing services without compromising accuracy or certification standards.

Supporting Fibre Quality and Genetic Improvement

Beyond commercial trading, fibre testing also plays an increasingly important role in animal selection, breeding programmes and flock management. Objective measurement data allows growers to make more informed decisions about genetic improvement, fleece quality and long-term production strategies.

While fibre diameter (micron) remains the primary quality measurement for alpaca and cashmere, NZWTA also provides additional testing services including yield, fibre length and strength analysis. These measurements help processors better understand fibre performance while giving growers more detailed information about fleece characteristics.

For cashmere producers in particular, specialised testing, including cashmere-specific yield calculations is becoming increasingly important as global demand for finer, more consistent fibre continues to grow.

By assigning unique identifiers to individual animals, NZWTA enables growers to track fibre performance from birth through maturity. This long-term data collection provides valuable insights into genetic trends and supports selective breeding programmes aimed at improving fibre quality, fleece uniformity and commercial returns over multiple seasons.

'Growers have been using NZWTA's fleece services as part of a broader strategy to unlock genetic gains and accelerate flock transitions for several years,' says David Alexander. 'This enables them to meet targeted contract specifications much faster than with traditional methods.'

To learn more about NZWTA's wool, alpaca and cashmere testing services, visit www.nzwta.co.nz and select the International Customer section.



NEPAL

by Mainbayar Badarch

NEPAL REVIVES ITS PASHMINA INDUSTRY TO REDUCE RELIANCE ON IMPORTS

Pashmina is internationally recognised as one of the finest and most luxurious forms of cashmere. Produced from the fine undercoat of the Himalayan mountain goat, locally known as the Chyangra, Nepalese pashmina is renowned for its exceptional softness, warmth and quality, with fibre diameters typically ranging from 12–16 microns. The word pashmina is derived from the Persian word pashm, meaning wool.

The industry is an important contributor to Nepal's economy, supporting more than 300,000 jobs across goat herding, fibre collection, spinning, weaving, knitting, dyeing and garment manufacturing, particularly in rural regions.

Nepal has an estimated 131,000 Chyangra goats. This could provide around 13 tonnes of greasy fibre, yielding approximately 6,600–7,900 kg of dehaired combed fibre after processing. Including industrial spinning, potential production is estimated at 5,600–7,500 kg of pashmina yarn annually.



Nepalese pashmina has a unique position in the global luxury fibre market. The Chyangra Pashmina™ trademark, registered in 47 countries, protects and promotes authentic Nepalese products. According to Nepal's Department of Customs, exports of knitted and woven pashmina products reached US$20 million and US$14 million, respectively, in 2023/24, while the country's annual production capacity is around 4.5 million woven and knitted pashmina products.

Established in 2000 by 80 founding members, the Nepal Pashmina Industry Association represents and promotes the industry. With support from the European Union, it is working to increase the use of Nepalese cashmere fibre, develop local yarn production and reduce reliance on imported raw materials from China and Mongolia.

Kathmandu Valley is the centre of Nepal's pashmina industry, with many producers and retailers located in the famous Thamel district. The sector consists largely of small- and medium-sized enterprises producing both woven and knitted cashmere products. During a recent visit, *Wool2Yarn* met with several Kathmandu-based manufacturers, ranging from specialist artisan producers to large integrated business groups, highlighting the strength and diversity of Nepal's pashmina sector.

Golyan Group

Shakti Golyan, Managing Director of Tricot Industries, Golyan Group told *wool2yarn*: 'I have been engaging with textiles industry since my childhood. I graduated from University of Leeds, majoring in textile management, in 2001. Over the last 2 decades, I have created the largest cashmere-producing company in Nepal and continue my effort to produce cashmere products from high-quality, ethically sourced cashmere.

'Demand for pure cashmere garments has declined, while demand for cashmere-blended garments has increased in recent years. Currently, demand for cashmere shawls remains strong. The industry is highly competitive, with new players emerging globally every day. Some large companies are also investing in this sector,' Shakti Golyan continued.

Italy and Germany account for 60% of Tricot's total export market, while the remaining 40% is distributed across the US, France, the UK, India, New Zealand, Australia and other countries. Tricot is well positioned to supply cashmere products to the US market, as Chinese products face higher tariffs imposed by the US. The company mainly prefers air transport for shipping pashmina products, with freight costs averaging around $1 per garment.

Shakti Golyan noted that when the company first started exporting pashmina garments, it regularly attended international textile and cashmere trade expos to promote its products. Today, securing sales orders is no longer a major challenge. Instead, the company's main difficulty lies in managing production capacity and ensuring timely delivery of orders.

'Recently, our company installed modern digital printing machines worth US$700,000, working for cashmere sweaters and scarfs.'

Shakti Golyan further comments that their 'brand 'Scottish Borders' - heritage cashmere is exceptional knitwear, made by artisans, and crafted from 100% cashmere, merino, and wool blends.

Divya Pashmina

Upendra Giri, Managing Director of Divya Pashmina Udyog told *wool2yarn*: 'The number of Nepali goat herders has been declining due to climate change and rapid urbanization. Most of our goats produce grey or black fiber, while white-haired goats are very limited in number. Gray and black cashmere is difficult to dye, so we have been importing cashmere yarn for many years. However, we are now working to revive the local industry. Around 62 Nepali pashmina garment companies have taken the initiative to strengthen and upgrade the pashmina sector in cooperation with farmers.

'1- kilogram of raw cashmere costs NR4,500 (US$30) in our country. Currently, we procure our cashmere yarns from Consinee group and M.ORO Cashmere in China. In 2025 we imported 5,000 kg cashmere yarn. In early 2026, we have ordered 1500 kg yarn. Chinese cashmere yarns are better than yarns made in India. Our cashmere garments are exported to the US, the UK, Germany, Japan, and South Korea,' said Upendra Giri.

Sobha Cashmere

Dinesh Tuladhar, Managing Director of Sobha Cashmere, said: 'I have been working in the pashmina industry since 1995. We produce both knit and woven items, and offer screen printing, hand embroidery, and yarn dying services. Our collection of handcrafted products is made from the finest 100% cashmere and cashmere-silk blends. We are optimistic about the pashmina market. So, our company is opening its second pashmina garments shop at Thamel tourist district. We also sell merino wool mixed scarfs and shawls. Its quality and softness are comparable to those of cashmere.

'Nepal's pashmina sector first gained international recognition through British media coverage. Following Queen Elizabeth II's visits to Nepal, a handwoven Nepalese pashmina shawl presented as a gift attracted widespread attention and helped spark global interest in pashmina fashion,' Dinesh Tuladhar explained.

The EU/UK Programs and its Suggestions

With the support of the EU-Nepal Trade and Investment Program (2020-2025), the UK Trade Partnership Program (2023-2026), both implemented by the International Trade Centre (ITC), Nepal's pashmina industry is undergoing a significant transformation. With a budget of US$5.4 million, these programs have made a significant contribution to Nepal's pashmina industry, facilitating approximately 90 business contacts in the EU and UK and supporting collaborations with Stella McCartney and Sturla.

To address the challenge of the country's broken supply chain for pashmina, ITC worked with various partners, bringing together farmers, manufacturers, traders and exporters of pashmina products. The project developed a Chyangra Pashmina trade strategy and action plan involving stakeholders across the value chain. The goal is to reach US$75 million worth of sustainable pashmina exports by the end of 2026.

Vidur Ghimire, Project Coordinator of ITC, told *wool2yarn*: 'recognizing the significant achievements of ITC's support, the Government of Nepal has requested continued assistance through the Enhanced Integrated Framework Phase III Program. Discussions are currently underway regarding a potential new phase of collaboration aimed at consolidating gains made to date and further strengthening the competitiveness, sustainability, and export performance of Nepal's pashmina value chain.'

ITC worked with farmers, manufacturers, traders and exporters to develop a comprehensive Chyangra Pashmina Trade Strategy and Action Plan. The initiative aims to strengthen the entire value chain and increase sustainable pashmina exports to US$75 million by the end of 2026.

A key finding of the project was that Nepal requires domestic scouring and dehairing capacity to fully utilise its own Chyangra fibre. However, current fibre volumes are too low to justify investment in large-scale industrial scouring or spinning facilities. Instead, the report recommends semi-



Dinesh Tuladhar, Sobha Cashmere



Shakti Golyan, Tricot Industries, Golyan Group



Upendra Giri, Divya Pashmina Udyog

industrial scouring, dehairing, carding and combing equipment as the most economically viable option at present.

The study found that machinery could be sourced from China or India, while European and Japanese equipment would generally be prohibitively expensive for the sector's current scale. Although China has extensive experience in cashmere processing, much of its machinery is designed for substantially larger production volumes than those currently available in Nepal.

Indian equipment was identified as a particularly attractive option due to its lower capital cost—approximately one-third less expensive than comparable Chinese machinery—while still offering a favourable performance-to-cost ratio. Members of the Nepal Pashmina Industries Association (NPIA) visited India to inspect equipment in operation and reported positive results, expressing confidence that the technology could be successfully adopted in Nepal.

The report does not recommend investment in industrial spinning facilities at this stage. It estimates that at least 30 tonnes of pashmina fibre annually would be required to operate even a small-scale processing plant efficiently. As domestic fibre production expands, future investment in additional processing stages and more advanced technology may become viable.

Instead, the report highlights hand-spinning as a practical and valuable option for converting dehaired and combed fibre into yarn. This approach would generate employment, particularly for women, while preserving the traditional Nepali character of pashmina products. Combined with traceability systems linking finished products back to farmers, spinners and weavers, hand-spun yarn could support premium positioning through authenticity and storytelling.

The report concludes that Nepal is unlikely to replace all imported pashmina yarn with domestic production. However, substituting a portion of imports with yarn produced from locally sourced Chyangra fibre could provide significant economic benefits and encourage more farmers to participate in fibre harvesting as the supply chain develops.

The industry also faces an important trade policy challenge. Nepal is scheduled to graduate from Least Developed Country (LDC) status in November 2026, a move that could eventually reduce preferential market access and expose Nepalese pashmina products to greater competition, particularly from Chinese suppliers.

In May 2026, the Government of Nepal formally requested a three-year postponement of its graduation to developing-country status from the United Nations Committee for Development Policy. The government cited increasing domestic and global economic pressures and expressed concern that graduation could lead to the loss of important support measures, including Duty-Free and Quota-Free market access currently available to Nepali exports.

CHINA

by Robert Wang



CHINA BALANCES TIGHT SUPPLY AND WEAK DEMAND



The Chinese wool textile industry continues to face considerable uncertainty in 2026. Weak demand for wool textile products in both domestic and international markets, combined with China's subdued economic performance, has resulted in a slow recovery since the end of the COVID-19 pandemic. The current situation can be summarised in the following key areas.

Raw Wool Demand

Following several years of economic contraction caused by global crises, China's imports of greasy wool remained at relatively low levels until September 2025, when pipeline stocks had almost been exhausted.

Since the third quarter of 2025, demand for greasy wool from Chinese buyers has steadily increased, contributing to higher prices not only in the Australian wool auction market but globally. Another major factor behind the price surge has been the severe shortage of raw wool supply, particularly Australian Merino wool.

These combined factors pushed the Australian Eastern Market Indicator (EMI) up by 61% over the past 12 months, reaching 1,946 Australian cents per kilogram clean at the end of the 2025/26 financial year—an increase of 736 cents over the period.

However, much of this purchasing has not yet translated into finished product manufacturing. Instead, it has largely been used to rebuild depleted raw material inventories. Many manufacturers in China anticipate continued long-term supply shortages that could restrict future market opportunities, prompting a wave of precautionary buying.

According to the latest Australian Wool Exchange (AWEX) statistics, China purchased 87% of the Australian wool clip during the 2025/26 season, up from 85% the previous season. Given that Australian wool production declined by 11.8% in 2023/24 and a further 8.8% in 2024/25, this increased purchasing should not be interpreted as evidence of stronger wool consumption, but rather as stock replenishment amid tightening global supply.

Export of Textile Products

Figures released by the China Wool Textile Association (CWTA) indicate a mixed export performance during the first half of 2026.

Most wool product categories recorded modest growth, particularly carpets. However, exports of wool tops and woven garments declined compared with the same period last year. Other finished and semi-finished products, including wool yarns and knitwear, posted slight increases.

Despite these improvements, export volumes and values remain below pre-pandemic levels. Overall, textile products continue to be among the sectors most affected by the ongoing tariff measures imposed by the United States since 2025.

Domestic Consumption

Although official data on domestic wool consumption remain limited, market observations indicate that consumer demand is still subdued.

Chinese consumers continue to spend cautiously, with a larger share of disposable income being directed towards essential expenses such as education, healthcare and housing. At the same time, travel and leisure have become increasingly important areas of household expenditure in China.

Consumers also remain highly price sensitive, and spending on apparel has generally declined over recent years. China's rapidly ageing population has further influenced purchasing patterns, with more than 30% of the population

now reaching retirement age. In addition, ongoing economic pressures have seen many white-collar workers transition into blue-collar occupations.

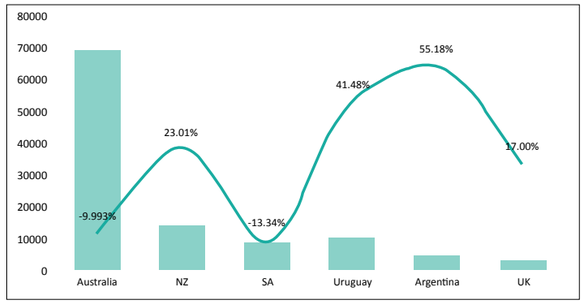
As a result, both younger and middle-aged consumers have increasingly shifted away from traditional formal wear towards more casual clothing. Combined with rapidly changing fashion trends, this has encouraged greater demand for garments made from synthetic fibres or lower wool-content blends, provided they offer appealing designs and competitive prices.

The Chinese wool textile industry has invested considerable effort into stimulating domestic demand for wool products, although the results have so far fallen short of industry expectations.

Like many international markets, the Chinese market for coarser wool used in interior applications has experienced a significant downturn over recent years due to weak demand. The slowdown in commercial building construction has substantially reduced demand for interior textiles, while synthetic carpets continue to dominate all but the premium luxury flooring segment.

There are, however, encouraging signs for crossbred wool. During 2026, demand for traditional crossbred wool has begun to recover, suggesting renewed interest in wool-blend winter apparel. Woollen mills have reported improving business confidence for the coming season, which has been reflected in firm prices for crossbred wool from major producing countries.

Imports of greasy wool to China
Source: China Wool Textile Association



Industry Shifts North-West

An important structural shift has emerged within China's wool textile industry in recent years. Increasing numbers of manufacturers from the eastern coastal provinces have either relocated production facilities to north-western China, particularly the Xinjiang region, or established new operations there.

The incentives offered by local governments, including favourable land use, discounted utility costs and tax concessions have been key drivers of this relocation.

Equally important is Xinjiang's proximity to China's cashmere production. Manufacturers increasingly recognise that combining wool and cashmere offers significant commercial advantages. Blending fine wool with cashmere not only reduces production costs but also enables more competitively priced products that appeal to both domestic and international consumers.

This strategy has proven successful, with Xinjiang doubling exports and domestic sales of wool-cashmere blended products over recent years.

Although the industry remains in a subdued phase, investment in technology and manufacturing capability continues. Companies are focusing on reducing carbon emissions, expanding the use of artificial intelligence and accelerating digitalisation to improve productivity, efficiency and environmental responsibility.

Global geopolitical uncertainty continues to slow economic recovery, and China is no exception. The country's wool textile industry is operating well below the rapid growth experienced during the late twentieth and early twenty-first centuries. Nevertheless, slower growth should not be mistaken for structural decline.

Despite ongoing challenges, the Chinese wool industry has demonstrated considerable resilience. Supported by its integrated manufacturing capability, technical expertise and continuing investment in innovation and sustainability, China is expected to maintain its position as the world's dominant wool processing and manufacturing centre for many years to come.

WOOL TO YARN
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PRECISION SOLUTIONS *from Wool to Yarn*

For many years, White Shark / Brujas has supplied textile companies around the world with advanced carding solutions for all fibre types, including wool, speciality fibres, cotton, and blends. The company's comprehensive product range includes metallic card clothing, flexible fillets, top flats, stationary flats, rotor spinning components, and circular combs.

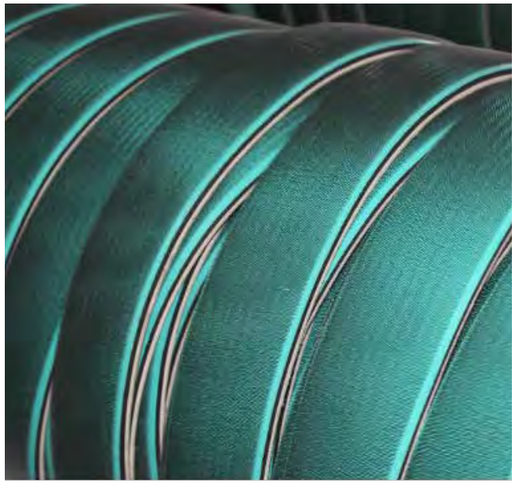
'Card clothing is one of the most critical working elements on modern carding machines,' says Mr Zhang Yonggang, CEO of White Shark / Brujas. 'The quality of card clothing has a direct impact on fibre separation, web formation and sliver uniformity, making it a key contributor to both yarn quality and mill productivity.

'In recent years, metallic card clothing has become increasingly important in wool processing, particularly on high-production carding systems, waste recycling lines and semi-worsted equipment,' 'Its precise fibre control enables stronger drafting and improved fibre orientation during carding, resulting in enhanced fibre parallelisation and better preparation for subsequent spinning operations. The outcome is a more uniform sliver, improved processing stability and the potential for stronger, more consistent yarns.'

White Shark / Brujas metallic card clothing is manufactured using advanced coating processes and high-wear-resistant composite plating technology. This delivers exceptional durability and long service life without the need for frequent grinding, helping mills meet growing demands for higher production speeds and improved operational efficiency.

'We focus on offering tailored solutions based on specific demands and problems. We assess each client's combing requirements, the fibre they are working with, carefully, and deliver customized wires and services designed to achieve the best result as required.'

Flexible Fillets



Constructed from a fabric foundation fitted with elastically bendable steel wire teeth, White Shark / Brujas flexible fillets are widely used in wool spinning, coarse cotton spinning, flax processing and speciality fibre applications. They are commonly supplied as fancy, raising and cleaning fillets.

Their primary functions include gentle carding, fibre protection, efficient blending, impurity removal and fibre orientation.

'This makes our flexible fillets particularly suitable for long wool fibres, luxury fibres and other premium natural fibres where fibre preservation is critical to maintaining quality,' says Mr Zhang.

Drawing on more than a century of European card clothing expertise, Brujas flexible fillets are designed around the principle of gentle carding, helping reduce fibre breakage and fibre cutting while delivering the fibre preparation quality required for premium yarn production.

Metallic Card Clothing



Metallic card clothing combines strong carding performance with high productivity and is an essential component for processing long and delicate fibres. White Shark / Brujas metallic card clothing incorporates advanced coating technology and high-wear-resistant composite plating to provide excellent durability and extended service life.

Its long-lasting performance reduces maintenance requirements and eliminates the need for regular grinding, supporting the industry's drive towards faster production speeds and greater efficiency.

When used in combination with flexible fillets, metallic card clothing provides an ideal balance between productivity and fibre care, enabling processors to optimise performance across a wide range of fibre types and processing requirements.

Ring Travellers for Reliable Yarn Formation



At the spinning stage, ring travellers play a vital role in transforming prepared fibre into finished yarn. These high-consumption components are widely used in wool spinning, cashmere spinning and related textile sectors. Although small in size, their influence on spinning stability, yarn quality and production efficiency is substantial.

White Shark / Brujas ring travellers are engineered for smooth running and extended service life. Available in a wide range of specifications, they feature excellent surface smoothness, high strength, wear resistance and resistance to pressure and impact.

Designed to perform under demanding operating conditions, they maintain dimensional stability at elevated temperatures while reducing the risk of deformation, traveller fly-off and premature wear. These characteristics contribute to stable spinning performance, improved yarn quality and reduced maintenance requirements.

Supporting the Entire Wool-to-Yarn Value Chain

'High-quality carding provides a decisive advantage in producing yarns with improved strength, uniformity and appearance,' says Mr Zhang. 'Our card clothing and spinning components support the complete value chain from carding and fibre orientation through to twisting and yarn formation.'

White Shark / Brujas has offices and service centers in China, Vietnam, Uzbekistan, Turkey, Indonesia, Bangladesh, and Pakistan.

GREENER SAFER

Auxiliaries for Wool Processing

by Victor Chesky



Zhu Jiankun

The global wool textile industry is undergoing a fundamental transformation. Across every stage of processing—from wool scouring and top making to dyeing, spinning and finishing—environmental compliance is no longer an optional value-add but an increasingly essential requirement for market access.

International brands, particularly in Europe and North America, are imposing stricter standards for chemical safety, traceability and the control of hazardous residues. As a result, effective chemical management has become a key competitive advantage for textile manufacturers seeking to supply premium global markets.

According to Mr Zhu Jiankun, Managing Director of Zhejiang Yongjin Bio-Tech (DALIS), the global textile supply chain is experiencing a structural shift in which environmental performance is becoming an integral part of commercial production standards.

"Access to mid- and high-end European and American markets now requires a combination of environmental certification, chemical compliance and full supply chain traceability. Green processing of wool fibres has become an essential requirement for today's wool industry," he said.

As one of China's leading manufacturers of environmentally friendly auxiliaries for the wool textile sector, DALIS exports its products to more than a dozen countries. The company is a registered member of the International Wool Textile Organisation (IWTO), holds more than 20 invention patents, and operates fully automated production facilities supported by an advanced research and development programme.

Its products have achieved a broad range of international certifications, including REACH, GOTS, ZDHC, Intertek and GOST. DALIS joined the Bluesign® system in 2024 and obtained OEKO-TEX® certification in 2025, aligning its products with internationally recognised environmental and chemical management standards.

Addressing Chemical Residue Risks

Mr Zhu Jiankun says, 'In recent years, several international apparel brands have faced product recalls and reputational damage linked to excessive chemical residues, highlighting weaknesses within textile supply chains. Issues such as excessive APEO residues, PFAS (per- and polyfluoroalkyl substances) contamination and the use of high-risk chemical auxiliaries continue to attract increasing regulatory scrutiny.'

DALIS has conducted ongoing random testing of wool textile products in the Chinese market. During inspections of products from several leading domestic yarn manufacturers, the company found that some finished yarns contained PFAS levels exceeding accepted limits. Follow-up traceability investigations indicated that the contamination originated from fluorinated auxiliaries used during dyeing.

The findings highlighted shortcomings in chemical selection, supplier qualification, process control and quality assurance within sections of the domestic wool textile supply chain.

Further third-party testing conducted by DALIS during 2026 on textile auxiliaries and wool fabrics across several Chinese provinces continued to identify significant concerns surrounding APEO (alkylphenol ethoxylate) residues.

According to the company, some commercially available auxiliaries produced residue levels exceeding 20,000 ppm—well above internationally accepted compliance limits. High-risk auxiliaries capable of leaving substantial chemical residues remain widely used in parts of the wool and cashmere processing industry.

As international regulations continue to tighten, effective management of chemical inputs throughout the production chain—from raw fibre and semi-processed materials through to yarns and finished garments—is becoming an essential requirement for companies seeking long-term participation in global markets.

Greener Wool Processing Technologies

With more than 18 years of industry experience, DALIS has focused on developing environmentally responsible chemical technologies based on bio-based and plant-derived raw materials.

In 2008, the company introduced one of China's first APEO-free wool scouring agents, helping pioneer the transition towards greener wool processing chemicals. Since then, it has continued expanding its range of sustainable auxiliaries, including:

- APEO-free, phosphorus-free and formaldehyde-free wool scouring agents
- Fully biodegradable vegetable oil-based lubricating and combing auxiliaries;
- Chlorine-free anti-felting resin systems;
- Silicone-free, zero-residue softeners;
- Bio-based scouring auxiliaries produced from natural plant extracts.

Selected products have also been evaluated by internationally recognised wool testing organisations, including the Australian Wool Testing Authority (AWTA) and the New Zealand Wool Testing Authority (NZWTA).

The company says its complete product range is designed to meet the demanding environmental and safety requirements associated with premium wool and cashmere processing.

End-to-End Chemical Management

DALIS has implemented a comprehensive Bluesign® chemical management system covering the entire production process. The system incorporates raw material traceability, chemical risk assessment, regulatory compliance monitoring and process control, helping manufacturers minimise the risk of hazardous chemical residues before production begins.

By strengthening chemical management at the source, the company aims to assist wool processors in meeting increasingly demanding international environmental standards while improving product safety and supply chain transparency.

Mr Zhu believes greater industry collaboration will be essential as sustainability requirements continue to evolve. 'We are eager to share our chemical safety management compliance system with more outstanding enterprises and brand clients throughout the wool textile industry. By working together across the global wool supply chain, we can build a greener industry ecosystem characterised by low chemical residues, full traceability and improved product safety, helping China's wool industry move towards a more sustainable and internationally competitive future.'

For more information: Phone: +86 15757306505
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NANJING WOOL MARKET CONFERENCE 2027



Nanjing Wool Market team with Madam Yang (centre) and Jiang Chen (centre left)

Each September, the global wool industry gathers for the Nanjing Wool Market (NWM) Conference, one of the sector's most influential international events. Now entering its fourth decade, the conference attracts woolgrowers, exporters, traders, processors, spinners, manufacturers and industry leaders from around the world to discuss market developments and the future of the global wool trade.

More than a conference, NWM serves as a vital link between wool-producing countries and China's vast wool industry. Its membership includes woolgrower cooperatives, traders, primary processors, spinners and fibre companies throughout China. The organisation works closely with international industry bodies including Australian Wool Innovation (AWI), the Australian Wool Exchange (AWEX) and the Australian Wool Testing Authority (AWTA), while also supporting education, training and professional development across China's wool sector.

NWM also plays an important international role through the China-Australia, China-New Zealand and China-South Africa Joint Working Groups on Wool, helping strengthen cooperation and communication between producing and consuming nations.

"China remains the world's largest processor, manufacturer and consumer of wool, accounting for more than half of global raw wool imports. As a result, purchasing decisions, processing demand and market sentiment within China have a significant influence on global wool prices, trade flows and industry confidence," says Madame Yang, Chair of Working Groups Committee.

For exporters and industry participants from Australia, New Zealand, South Africa, Argentina, Uruguay and other wool-producing countries, the NWM Conference offers direct access to the market that drives much of the international wool trade.

"The Nanjing conference is more than just a market discussion—it is a real barometer of industry direction and an opportunity to strengthen relationships," noted one Australian exporter.

The conference provides a valuable forum at a time when the industry faces a range of challenges, including declining global wool production, changing consumer preferences, increasing sustainability requirements, geopolitical uncertainty and evolving trade policies.

Key Benefits of Attending

One of the conference's greatest strengths is its ability to bring together every link in the wool supply chain under one roof.

Delegates gain direct access to China's major wool buyers, processors and manufacturers, while also receiving the latest market intelligence on processing trends, consumer demand and global trade developments. The program features discussions on critical issues such as sustainability, traceability, regulation and market access, alongside opportunities to explore innovation and technology shaping the future of wool processing and manufacturing.

Networking remains a major attraction, with senior decision-makers from across the global wool industry attending each year.

"It is one of the few occasions when the entire wool supply chain is represented in the same room," said one European merchant.

NWM General Manager Jiang Chen emphasises the conference's unique role in connecting international businesses with China's wool sector. "It is an opportunity to strengthen friendships, build trust and celebrate our shared industry."

As global wool markets continue to evolve, the Nanjing Wool Market Conference remains one of the industry's most important platforms for collaboration, knowledge-sharing and relationship building across the international wool supply chain.

ACCREDITED TESTING SERVICES ACROSS MULTIPLE INDUSTRIES

The New Zealand Wool Testing Authority (NZWTA) and the Australian Wool Testing Authority (AWTA) Product Testing Division provide comprehensive accredited testing services to a broad range of industries across Australasia and international markets.

"We test and evaluate a diverse range of products, including fibres and yarns, textiles and apparel, safety garments and healthcare materials, plastics and laminates, ducting and insulation, carpets and flooring, as well as automotive and aeronautical aftermarket components," says CEO Duane Knowles. "This is particularly important for companies seeking to sell products in Australia and New Zealand and requiring locally recognised certification."

The laboratories specialise in flammability testing, thermal conductivity, spectrophotometry, retro-reflective performance and accelerated weathering, helping manufacturers demonstrate product compliance, performance and durability.

For more information www.nzwta.co.nz

A STRATEGIC PROCESSING HUB IN EUROPE



Koycho (left) and Milen Bachvarov

As wool processors and textile manufacturers seek flexible sourcing options and reliable processing partners, Kolhida in Bulgaria is positioning itself as a valuable link between European wool growers, and topmakers and spinners across the global wool supply chain.

With more than 60 years of wool-processing experience, Kolhida offers a complete range of services, including scouring, carding, combing, topmaking, and commission processing, making it an attractive partner for companies looking to source and process wool efficiently within Europe.

Located in Sliven, Bulgaria, one of Eastern Europe's historic wool-processing centres, Kolhida combines traditional wool expertise with modern processing capabilities.

Kolhida can source a broad range of European greasy wools from 24 to 34 microns from South America, Hungary, Serbia, Bulgaria, Romania, Russia and the Caucasus region. 'There are some very

Offering you more

• Cost competitive supply of all European wools from carpet grade to fine Merino

• Offering greasy scoured and tops

• More than 60 years experience in processing European wools

KOLHIDA-SLIVEN JSC

SLIVEN, BULGARIA
Contact: Koycho Bachvarov
Tel: +359 87 8879 568
Email: koycho.bachvarov@gmail.com

OEKO TEX®



Koycho Bachvarov

good Merino and crossbred wools available from these regions,' says Milen Bachvarov. "The key is ensuring the wool is properly sorted and processed to meet the requirements of individual customers.'

The company maintains extensive expertise in hand-sorting wool according to micron, colour, length and end-use requirements. 'We are one of the few companies in Europe that still retains significant knowledge in sorting European wools,' he says. 'This allows us to provide customers with wool that is suitable for spinning, dyeing, carpet manufacturing and a wide variety of wool-blend applications.'

Bulgaria's position within the European Union provides customers with the advantages of EU regulatory compliance, efficient logistics and competitive manufacturing costs. Despite the decline of sheep numbers across much of Europe, the region continues to retain a highly skilled workforce with generations of experience in wool sorting and processing.

'Our company is family owned, competitive, and quality focused,' he says. 'We have been processing wool for six decades and continue to build on the knowledge and skills that have made Bulgaria an important wool-processing centre.'

'A major factor for our customers is our ability to process smaller orders for both combed wool tops and open tops to meet the needs of different spinning systems and manufacturing processes. Our processing capacity is 48 tonnes of greasy wool, 24 tonnes of scoured wool, and 22–24 tonnes of wool tops per day.'

The company exports wool in 300 kg bales, while tops are supplied in convenient 12 kg bumps for efficient handling and transport.

Commission Processing Services

Kolhida also offers comprehensive commission processing services. Customers can supply their own wool – whether sourced from Europe, South America, Australia or New Zealand—and utilise our facilities for processing.

'This provides international wool companies a cost-effective European processing option while maintaining full ownership of their wool. This flexibility allows our customers to optimise logistics, reduce transport costs and access European processing expertise without investing in additional infrastructure.

'In addition to sourcing European-origin wool, Kolhida can also supply selected South American wools, giving customers greater flexibility in raw material selection.

'This enables manufacturers to develop fibre blends that combine the unique characteristics of European and South American wool types while maintaining competitive costs and consistent processing performance,' says Milen Bachvarov. 'Whether customers require medium micron wooltops for knitting and weaving applications or stronger crossbred wool for carpets and technical textiles, we can assist in sourcing and processing.'

Kolhida operates its own on-site laboratory to support quality control and production consistency. The company also offers OEKO-TEX Standard 100 certification.

Fibre Diameter and Length Measurement



OFDA2000 Laboratory Benchtop Model

Rapid Automatic Measurement of Diameter and Curvature of Wool, Alpaca, Cashmere, Synthetic and Other Fibres

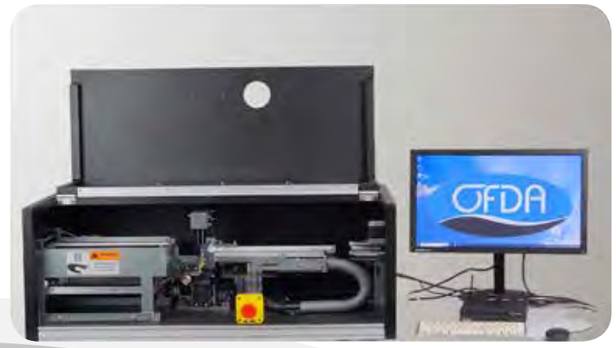
Recognised by IWTO Test Method 47 for measuring fibre snippets.

OFDA2000 Portable Farm Model

Measures greasy wool and gives diameter profile along the staple.

**Robust but light weight design.
One third the size of the previous model.**





OFDA4000

Rapid Automatic Measurement of Diameter, Length and Hauteur for Wool, Alpaca, Cashmere, Hemp, Synthetic and Other Fibres

Recognised by IWTO Test Method 62 for length measurement.

OFDA

To contact your local agent please email info@ofda.com or visit www.ofda.com

OFDA UPGRADES

Deliver faster, Smarter fibre Testing

Since its introduction, OFDA (Optical Fibre Diameter Analyser) technology has transformed the way wool and luxury fibres are measured. Using advanced optical imaging and analytical software, OFDA systems rapidly analyse thousands of fibres and generate detailed reports covering fibre diameter, comfort factor, curvature and fibre distribution,' says Thomas Hegerty of Robotic Visions, manufacturer of OFDA fibre testing equipment.

As global wool and cashmere markets become increasingly quality-driven, accurate fibre testing is becoming more important throughout the supply chain. Growers, exporters, processors, and brands rely heavily on objective fibre measurement to support pricing, quality assurance, traceability and sustainability verification.

Recent upgrades to OFDA machinery are now delivering major improvements in speed, accuracy and automation across the global fibre industry.

Thomas Hegerty comments that 'regular equipment upgrades are an essential part of continuous business improvement, helping companies enhance productivity, quality and operational performance. Taking advantage of technological advances enables businesses to improve outcomes, increase efficiency and maintain a competitive edge in the market.'

'The major reason why companies upgrade to our latest OFDA2000 and OFDA4000 are the increased accuracy and increased testing speed. Modern systems can process larger sample volumes in shorter timeframes while maintaining highly accurate results. Faster image capture technology and improved data processing now allow laboratories and fibre buyers to generate results almost immediately.'

'This is particularly valuable in commercial trading environments where rapid purchasing decisions are required. In auction rooms, buying centres and processing plants, faster testing reduces delays and improves workflow efficiency,' he remarks.

Recent OFDA upgrades also include major improvements in optical imaging systems and fibre recognition software. Higher-resolution imaging allows more accurate detection of fine fibres, medullated fibres and fibre irregularities. This is especially important in high-value sectors, such as cashmere and superfine wool, where precise fibre measurement directly affects product quality and pricing.

Enhanced calibration systems are also helping reduce variability between laboratories and testing locations, improving consistency throughout international trade.

Portable OFDA systems are becoming increasingly popular throughout the wool and cashmere industries. 'Our compact OFDA2000 now enables fibre testing to be conducted directly on farms, in warehouses, classing centres and purchasing locations, rather than relying solely on central laboratories. This capability is particularly valuable in remote fibre-producing regions such as Mongolia, Australia, New Zealand and parts of South America where immediate quality assessment can improve procurement decisions and pricing transparency,' he says.



Thomas Hegerty with OFDA4000 - a world-first laboratory instrument capable of simultaneously measuring fibre diameter and length in slivers and tops

Another major development is the integration of OFDA systems with digital traceability and data management platforms. Modern software upgrades allow fibre test results to be directly linked with bale identification systems, supply chain databases and certification programs.

This creates stronger traceability throughout the production chain and gives brands and consumers greater confidence in fibre specifications and origin claims. For luxury fibres, such as cashmere and superfine wool, traceability is becoming increasingly important as brands seek verifiable sourcing and sustainability information.

Upgraded OFDA machinery is also reducing dependence on manual operator input. Improved fibre recognition algorithms, simplified calibration systems and automated sample preparation assistance help minimise human error while improving testing consistency.

Objective fibre testing also plays a growing role in sustainability verification and responsible sourcing programs. Brands and retailers are placing greater emphasis on measurable quality assurance and transparent fibre specifications, with OFDA systems providing independently verifiable testing data throughout the supply chain.

'For the global wool and luxury fibre industries, our OFDA testing technology offers far more than simple technical improvements. They reflect the industry's broader shift toward precision manufacturing, traceability and data-driven quality assurance requirements,' concludes Thomas Hegerty.

ONE GROUP

A Unified Approach in Fibre Machinery

nsc Group's greatest strength lies in its ability to operate as a genuine one-stop shop for wool and long-staple fibre processing. By bringing together the specialist expertise of Sant'Andrea Novara, Cognetex and N. Schlumberger within a single integrated organisation, customers gain access to complete processing solutions from fibre opening and carding through to drawing, combing, roving and spinning.

'By combining forces, these three world-recognised brands offer a comprehensive, integrated machinery options to meet the needs of premium fibre processing industries,' comments CEO Eric Ottmann. 'The nsc-Cognetex-Sant'Andrea-Seydel partnership reflects a forward-looking strategy in a changing global market. By combining technical expertise, innovation capability and global reach, the alliance is well positioned to shape the future of premium fibre processing.'

'For topmakers and spinners in China that are interested in upgrading to the latest technologies, working with one engineering partner will reduce complexity, shorten



Group CEO Eric Ottmann

installation times and provide greater confidence in long-term operational performance,' says Antoine Zimmermann, Area Sales Manager. 'Combined with global service support, digital monitoring systems and continuous research and development, nsc Group offers manufacturers in China a highly efficient pathway to improved productivity, quality, and sustainability.'

'This unified structure simplifies project management, technical support and after-sales service while ensuring compatibility and optimisation across the production line,' he adds.

This integrated structure enables nsc customers to benefit from end-to-end solutions covering every stage of wool preparation and spinning, while harmonising engineering standards to improve reliability and machine uptime. The consolidation of product development and service networks has also strengthened the supply of spare parts, retrofits and technical upgrades.

ELVO smart-generation drawing frame

For almost 100 years, Sant'Andrea Novara has manufactured machinery for spinning preparation across all wool-cut fibres.

Eric Fessler, Commercial Director, remarks, 'Spinners around the world often tell us that old Sant'Andrea machines are reliable and they see no reason to shift to more modern machines. But even the most reliable older machines cannot compare to the technological leap we have made in moving from mechanical to fully electronic operation. The new ELVO is faster, more accurate and significantly more advanced.'

COGNETEX - IDEA SERIES

For decades, Cognetex has been recognised globally for precision engineering and reliability in spinning frames technologies, with exports to markets including Turkey, India, China and South America.

Cognetex machinery is now assembled at the Sant'Andrea Novara plant and is fully integrated into the nsc Group manufacturing range.

The IDEA spinning frame offers up to 1056 spindles, supporting high-speed yarn production with integrated automatic piecing and yarn-clearing systems that significantly reduce downtime. It offers single and double drive worsted ring spinning frames as well as 4 cylinders draft a unique technology.

Its multimotor drive system enables independent control of all the spindles, providing mills with greater operational flexibility. Advanced sensors and control software provide real-time monitoring of production parameters, while machine-to-machine communication through IoT protocols enhances predictive maintenance and process optimisation.

nsc - GC50, FMV50 and ERA50 combing machines

nsc next generation GC50, FMV50 and ERA50 combing machines offer state-of-the-art performance for topmakers and spinners. 'In the past the quality of every batch depended on the experience and knowledge of the floor operator. Today our combs are all controlled by means of a touch screen. No great experience or knowledge is required as all parameters are set electronically,' says Eric Fessler.



From left: Wilan HAMRAOUI, Eric FESSLER, Antoine ZIMMERMANN

'Operating as individual units, the old combs required resetting machines individually every time the operator made an adjustment, and each machine needed a person for this task. It can be time consuming to reset these old machines.

'As many as 15 new ERA50 machines can be operated by one or two people. Adjustment or changes to batches can be done in a couple of minutes and all machines communicate with each other, producing reliable quality top.'

By combining generations of textile engineering expertise with advanced digital technologies and integrated production solutions, N. Schlumberger, Sant'Andrea and Cognetex continue to set a benchmark for innovation, reliability and performance in the global wool and speciality fibre machinery industry.

FMV50

- Prepared to the Industry 4.0 with a complete data collection
- Electronically monitored in order to enhance precision and responsiveness
- Outstanding performances up to 250 m/min with one rubbing level
- The vertical rubbing frames are fully automatic, reliable and flexible
- 3 different types of interchangeable drafting systems
- The new suction system with two filtering bags replaces the traditional suction box



ERA50 new main features

- Fine tune settings given by the electric motion of 9 axes improve the textile quality
- Optimized cleanliness / waste ratio due to 4 different circular comb speeds
- Larger filtering surface with bag
- 15" touch screen for production data, documentation or power consumption
- Internet connection for remote machine diagnostics by our customer service
- Ready for Industry 4.0 with complete data collection



Elvo wool and long staple fibers

- Compact and ergonomic layout designed on the tunnel base doffing to reduce space
- Single frame adapts for can sizes 700-800 and 1000 mm
- Heights 1000 or 1200 mm keeping tunnel system doffer
- Can load on 2 sides
- Central engine compartment with easy access

IDEA series - worsted ring spinning frames

The IDEA spinning frames can be supplied with 3- or 4- cylinders drafting unit, spindles gauge of 75 or 82.5 mm and single- or double-drive. IDEA single-drive represents the ideal combination of production performance and yarn quality IDEA double-drive makes it possible to work yarns of different type, colour and count on the two side of the machine, which are completely independent from each other. The count range which may be processed is from Nm 10 for coarse material to Nm 200 for very fine material. IDEA offers simple operation, low maintenance and low energy consumption.

TECNOMECCANICA
Ploner BIELLESE s.r.l.

DESIGNS AND PRODUCES COMPLETE PLANTS FOR FIBER PREPARATION SINCE 1969

FIBER BLENDING, DESIGNED WITH LOVE

FIBER BLENDING SYSTEM AND PNEUMATIC CONVEYING PLANTS
BALE BREAKER
CARDING WILLOW AND OPENERS
AUTOMATIC BLENDING BINS WITH ITS BIN EMPTIERS
OILING PLANTS
AUTOMATIC CARD FEEDING SYSTEM
CENTRALIZED FILTERING STATION



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ENGINEERING EXCELLENCE FROM BIELLA TO THE WORLD

Italian engineering, in-house manufacturing and decades of specialist know-how continue to support wool and cashmere processors across the globe.

For decades, Tecnomeccanica Biellese (TMB) has been one of the world's leading suppliers of machinery and complete processing systems for wool, cashmere and other valuable staple fibres. From its headquarters in Biella, Italy—one of the world's most renowned textile manufacturing districts—the company has built an international reputation by working closely with fibre processors across Europe, Asia, the Americas and the Middle East.

Today, TMB machinery operates in mills worldwide, helping manufacturers improve fibre preparation, increase productivity, reduce waste and consistently achieve higher-quality yarns. Every installation is engineered to suit the customer's specific fibre characteristics, production objectives and processing requirements.

TMB remains a family-owned and managed company, combining personalised customer support with a manufacturing philosophy that has become increasingly rare within the machinery industry.



Left to right: Giovanni Ploner, Stefania Ploner, Luigi Ploner, Marco Ploner, Paola Ploner and Mario Ploner (centre front)

Unlike many equipment suppliers that have progressively outsourced manufacturing over the past decade, TMB continues to produce virtually every structural component and critical mechanical part of its machinery in its own workshops in Biella. This vertically integrated approach gives the company complete control over machining, fabrication, assembly and testing, ensuring consistent quality while allowing continuous refinement of every machine to meet individual customer requirements.

Supporting this philosophy is a continuous programme of investment in advanced manufacturing technologies. TMB's production facilities include high-power fibre laser cutting systems, CNC punching equipment, automated press-brake lines, robotic welding cells and multi-axis CNC turning centres capable of machining large, high-precision components.

Designing and manufacturing entirely in-house gives TMB's engineers an exceptional understanding of every machine and every production process. This results in a level of technical flexibility, customisation and after-sales support that is difficult to match.



Neck cutting machine suitable for cutting whole bales of rags for fraying

This manufacturing capability is not simply a matter of production capacity—it is a strategic asset that allows TMB to respond rapidly to customer requests, implement design improvements without delay, and maintain the high standards of reliability and engineering excellence for which the company is recognised worldwide.

China represents one of TMB's most important markets. As the world's largest processor of wool and cashmere, Chinese manufacturers require highly efficient machinery capable of preserving valuable fibres while delivering maximum yield and consistent product quality. Over many years, TMB has partnered with many of China's leading textile companies, supplying advanced bale opening, blending, de-dusting, fibre preparation and waste regeneration systems.

Equipment designed for gentle fibre handling, efficient cleaning and rapid product changeovers enables processors to minimise fibre loss, reduce contamination and improve production flexibility—particularly when processing premium fibres, such as wool and cashmere.

Beyond China, TMB continues to support customers across established textile centres in Europe as well as emerging manufacturing regions investing in modern fibre processing technologies.

"Whether installing complete preparation lines for wool scouring plants or specialised machinery for regenerated and luxury fibres, our engineering expertise enables customers to modernise their operations while improving productivity and sustainability," says CEO Mario Ploner.

"What distinguishes TMB is our ability to develop solutions around each customer's real production requirements. Because we design and manufacture our machinery ourselves, we can adapt every detail of the equipment to achieve the best processing results."

This approach has enabled the company to establish long-term partnerships with topmakers, spinners and fabric manufacturers throughout China and around the world.

"Today China is the world's largest processor of textile fibres. Our technology enables manufacturers to improve efficiency, produce higher-quality products and achieve these results with greater environmental responsibility," says Mario Ploner.

By combining Italian engineering, advanced in-house manufacturing and decades of specialist experience, TMB continues to help textile manufacturers around the world remain competitive in an increasingly demanding global fibre industry.

AUSTRALIAN WOOL PRODUCTION TIGHTENS



Evan Croake

Despite tighter supply, there are encouraging signs for the Australian wool industry. 'Improved wool prices are encouraging Australian wool growers to retain and rebuild their flocks, helping to restore confidence across the Australian wool sector. While increasing wool production will take time, the recent market strength is a positive sign for the future and should support a gradual recovery in Australian wool supply,' says Evan Croake, Export Trade Manager at Techwool Trading.

'However, Australian wool production still faces significant challenges, placing increasing pressure on global supply chains. Rising labour costs, changing land use, and animal welfare requirements, have all contributed to a long-term decline in Australian wool production.

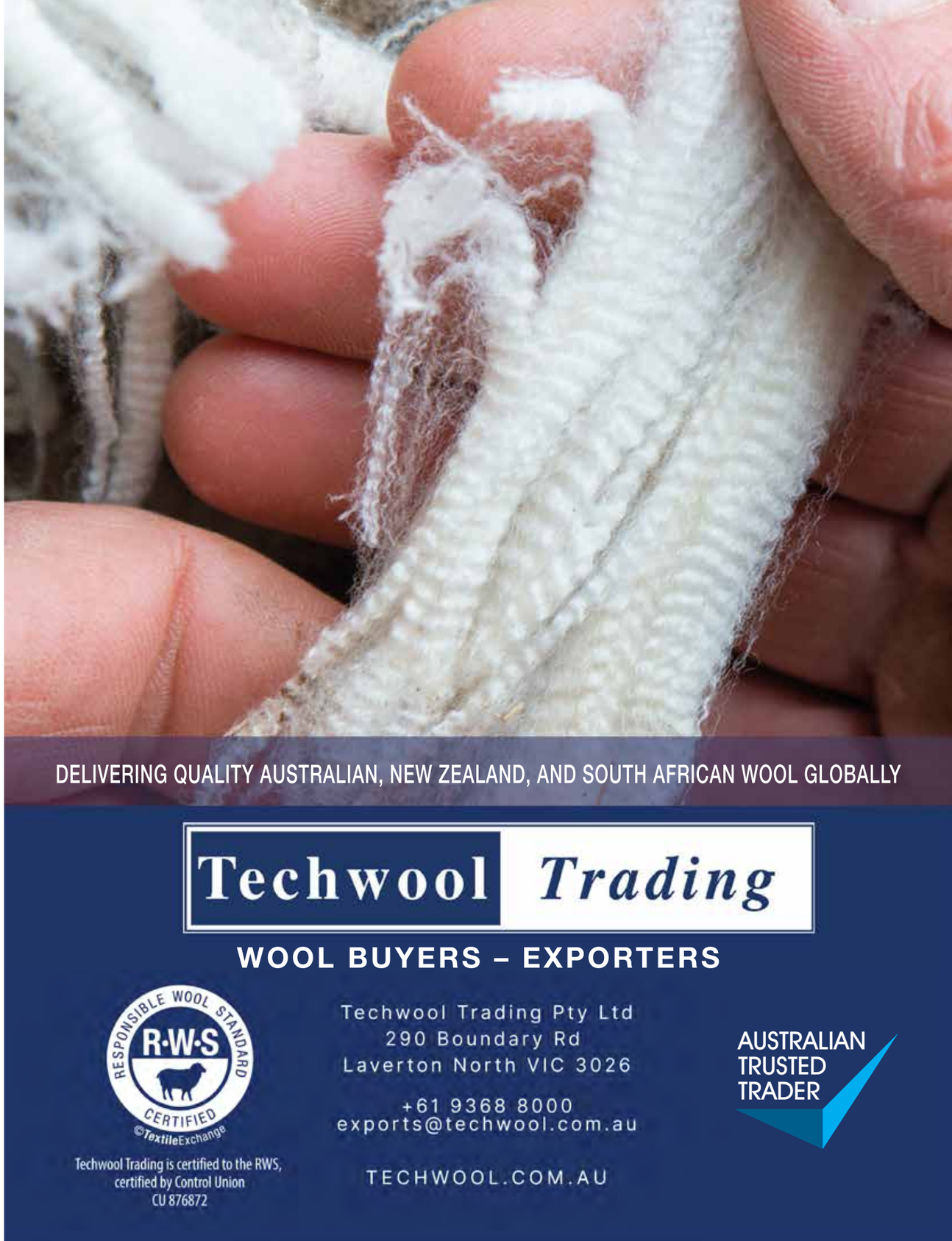
'While the challenges are significant, so too is the industry's ability to adapt,' says Evan Croake. 'Australia remains one of the world's most important wool-producing nations and customers continue to value the quality, consistency and performance of Australian wool.'

Techwool exports more than 320,000 bales annually and has achieved ten consecutive years of export growth. 'As Australia's largest wool exporter, Techwool is uniquely positioned to help customers navigate such periods of tighter supply.'

Further strengthening its sourcing capability, Techwool also offers customers access to New Zealand and South African wool. 'This provides additional security of supply at a time when access to quality wool can be limited,' says Evan Croake. 'Working with Techwool gives customers confidence that we can source virtually any specification they require. Our extensive buying network allows customers to source multiple wool types through a single trusted supplier.'

Techwool sources approximately 70% of its wool through the auction system and 30% through direct and private buying arrangements. The company supplies greasy wool across the full micron spectrum, from ultra-fine 13.5-micron Merino through to 40-micron crossbred wool, including fleece, skirtings, cardings and oddments.

'Sustainability expectations are reshaping the industry.





We see an increased interest from wool buyers for environmentally certified wool such as Responsible Wool Standard (RWS),' he says. 'Major brands are increasingly incorporating RWS wool into their collections as consumers seek high-quality natural fibres with strong environmental credentials.'

Techwool is Australia's largest supplier of RWS certified wool and continues to experience strong growth in demand for certified products. Today, RWS wool accounts for approximately 10–15% of Techwool's business, with particularly strong growth in crossbred wools of 32 microns and coarser.

China continues to be the dominant destination for Australian wool. It is the world's largest processor and importer, especially for combed wool used in large-scale garment manufacturing. 'China still anchors global auction pricing and sets the tone for broader merino and crossbred wool demand cycles,' says Aaron Shaw, senior wool buyer at Techwool.

'At the same time, the increase in wool purchased by India is significant for our company. The increase in shipments to India—particularly in the 21.5–23 micron segment—reflects growing demand from India, where wool is increasingly being used in blended yarns, knitwear, and mid-range apparel rather than only niche luxury garments. Indian mills are also diversifying away from purely synthetic fibres and incorporating more natural fibres, including Australian wool, into mass-market production.

'Countries such as Italy continue to play a major role in high-end wool processing, particularly for tailored suits and luxury fabrics, while Japan and South Korea focus on premium knitwear, technical fabrics, and high-quality finished garments. These markets are also very important export destinations for Australian wool,' Aaron Shaw says.

'Techwool is committed to providing customers with secure access to premium wool. In a world of tightening supply, reliable partners matter more than ever. We continue to offer the scale, sourcing reach, and market expertise needed to support our customers and meet future demand,' Evan Croake concludes.

AUSTRALIAN WOOL SUSTAINABILITY SCHEME

Like all natural fibre industries, the global wool industry is facing growing scrutiny over animal welfare, environmental management and ethical sourcing practices. Consumers, retailers and regulators are increasingly demanding greater transparency regarding the origin of wool fibres and the conditions under which they are produced.

With a significant proportion of the world's apparel wool grown in Australia, Australian wool is well placed to meet these needs. Considering Australia's unique pasture-based wool growing landscapes, its highly regulated operating environment, along with a long history of world-leading investment in research and development into best practice, safety, animal wellbeing and productivity, Australian wool delivers for brands. The Australian wool industry established the Australian Wool Sustainability Scheme (AWSS) to address these demands through independently audited certifications designed specifically for the commercial wool supply chain.

Built around independent verification and practical supply chain integration, AWSS provides brands with access to certified wool that supports evolving consumer expectations and international sourcing requirements.

The AWSS is managed by the Australian Wool Exchange (AWEX). AWEX is a member-based, independent service provider and standards owner for the Australian wool industry. Established in 1994, AWEX represents the majority of first-hand wool traded in Australia, with members including wool brokers, exporters, private treaty merchants, processors, wool producers, and associates. This strong industry connection helps ensure AWSS is practical, scalable and aligned with commercial supply chain requirements.

While focused on greasy wool, AWSS works across the entire pipeline — from growers and brokers to exporters, processors, manufacturers and retailers — supporting a transparent chain of custody for certified wool.

For brands, this provides greater confidence in sourcing decisions, reduced reputational risk and stronger alignment with Environmental, Social, and Governance (ESG) and sustainability goals.

SustainaWOOL - For Non-Mulesed and Ceased Mulesed Sustainably Produced Wool

SustainaWOOL certification is for non-mulesed / ceased mulesed wool growing properties and verifies a range of on-farm practices, including animal welfare standards, environmental stewardship, biosecurity, workplace practices and farm management systems, as well as soil health management, biodiversity protection, water stewardship and climate-related management practices.

The certification provides access to wool that meets growing market demand for traceable and ethically produced non-mulesed natural fibres without compromising fibre quality or processing performance.

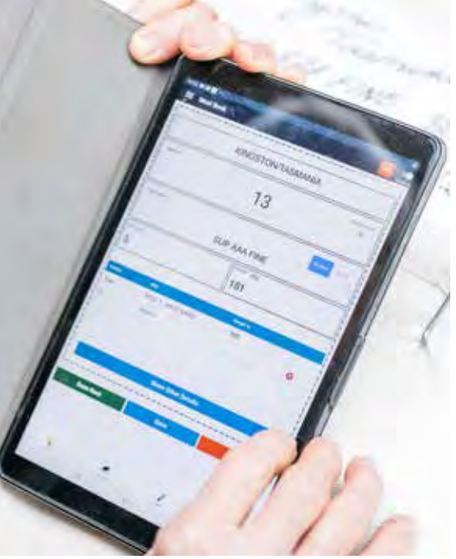
SustainaWOOL is designed to integrate smoothly into existing wool trading systems, making it practical and scalable for international supply chains. For brands increasingly required to demonstrate measurable sustainability outcomes, the program provides independently certified data and documentation to support responsible sourcing and sustainability reporting, including evidence relating to animal welfare, environmental management, workplace practices and farm governance.

Verified bale-level traceability is enabled through the use of Australia's WoolClip and eBale technologies.

ResponsiWOOL - For Sustainably Produced Wool from Properties using Mulesing with Appropriate Pain Relief

ResponsiWOOL embodies an inclusive sustainable spirit that recognizes the complexities of wool production in Australia.

Through ResponsiWOOL, the AWSS acknowledges mulesing as a tool that may be required in some flocks to deliver lifetime animal wellbeing outcomes



Verified bale-level traceability is enabled through the use of Australia's WoolClip and eBale technologies

against the significant risk of flystrike in Australia.

While the ResponsiWOOL certification accepts mulesing as a tool to manage this unique Australian challenge, it is only accepted when appropriate pain relief is used.

This approach allows flexibility for Australian wool growers, while providing transparency regarding sustainable animal welfare practices.

All requirements of ResponsiWOOL are identical to SustainaWOOL, with the sole exception of mulesing status and associated pain relief requirements.

Like SustainaWOOL, the program is independently audited and supports responsible sourcing by providing verifiable animal welfare, environmental and farm management credentials.

AWSS certifications deliver:

- Farm-level traceability
- Independently audited certification
- Verifiable animal welfare, environmental stewardship and care for people and community, including support for biodiversity, soil health, responsible water management and workplace wellbeing
- Supply chain transparency and efficiency
- Storytelling opportunities for brands and retailers

One of the major strengths of both the SustainaWOOL and ResponsiWOOL certifications is that they use the traceability that is already embedded within the Australian wool industry's infrastructure.

Through the integration of WoolClip and eBale technology, both SustainaWOOL and ResponsiWOOL certified wool can be digitally identified and traced from farm through to first-stage processing. Through the Australian Wool Traceability Hub (AWTH) – (see separate article on page....), this information can be securely accessed and shared across the supply chain, supporting brands, exporters and processors with verified provenance and sustainability credentials shareable along the supply chain.

Wool Clip captures wool classing and clip preparation information digitally at farm level, while eBale assigns each bale a unique electronic identity. Together, they support verified provenance, certification integrity and bale-level traceability from farm to first-stage processing.

While sustainability discussions often focus on emissions, animal welfare or traceability, one of Australia's greatest strengths continues to be the quality and consistency of its clip preparation.

Australia's wool classing system is recognised globally and remains one of the most sophisticated clip preparation systems in the world. AWSS embeds this directly into certification requirements.

All AWSS-certified wool must be prepared by a registered Wool Classer in accordance with the Code of Practice for the Preparation of Australian Wool Clips. This helps ensure consistency, reliability and integrity from the very beginning of the supply chain.

For processors and manufacturers, well-prepared wool is not only a quality issue. It also contributes to supply chain efficiency and waste reduction. Consistent classing and preparation help reduce contamination risks, improve processing efficiency and support more predictable manufacturing performance. Better-prepared wool also assists processors to maximise fibre utilisation and minimise unnecessary handling or sorting.

For brands and retailers seeking both sustainability assurance and product performance, AWSS-certified wool delivers both.

As demand for natural and traceable fibres continues to grow, AWSS-certified wool is becoming an increasingly valuable solution for global brands seeking trusted, responsible sourcing pathways, and access to more certified wool from the world's largest wool-producing market, supported by independently verified animal welfare, environmental and social responsibility credentials.

WEAR GREAT GARMENTS BEGIN

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Fox & Lillie is an Australian family-owned agribusiness connecting growers with global markets since 1948. From trading and exporting superfine Merino and specialty wool products through to local grower services in wool marketing, livestock and real estate, Fox & Lillie delivers end-to-end solutions from Australia to the world's leading textile and apparel brands.

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TIGHT AUSTRALIAN WOOL CLIP *Makes Supply Security a Strategic Priority*



Daniel Charters (left) and David Martin

As Australian wool production continues to tighten, securing reliable access to premium Merino wool is becoming one of the biggest challenges facing textile manufacturers, processors and brands worldwide. Declining sheep numbers, seasonal variability, rising production costs and competition from alternative land uses have reduced the size of the Australian wool clip, making long-term access to consistent, traceable fibre increasingly important.

For many global wool users, the challenge is no longer simply buying wool at the right price. Increasingly, it is securing the right quantity, quality and certification to meet manufacturing requirements months before production begins.

This changing procurement landscape is driving greater interest in supply partners that can provide direct access to Australian wool, verified traceability and greater certainty over future availability.

One company well positioned to meet this demand is Fox & Lillie. As one of Australia's largest wool brokerage and export businesses, the company combines a nationwide grower network with a significant export operation, supplying customers across major textile manufacturing regions.

By integrating its brokerage and export divisions, Fox & Lillie has established one of Australia's largest and most diversified wool supply networks. The company operates warehouses throughout New South Wales, Victoria and South Australia while maintaining close relationships with wool growers through its rural services business.

"This extensive sourcing network provides a strong foundation for our export business," says Daniel Charters, General Manager, Fox & Lillie Rural. "Our ability to source wool from a large number of Australian wool-growing farms provides customers with supply security, traceability and provenance."

Last season, Fox & Lillie exported approximately 140,000 bales of wool, supplying greasy wool, carbonised wool, scoured wool, wool top and open top to customers around the world. The close integration between its brokerage and export operations provides a direct link between growers and international manufacturers while improving transparency throughout the supply chain.

Traceability Moves to the Forefront

Alongside supply security, traceability has become a key purchasing requirement for many processors and brands as customer expectations and regulatory requirements continue to evolve.

Fox & Lillie responded to this trend in 2016 with the introduction of its Genesys platform, a certified wool supply chain program accredited to the Responsible Wool Standard (RWS) and independently verified by IDFL (Scope Certificate No. IDF-25-886171).

Today, Genesys includes more than 200 Australian wool growers, making it Australia's largest Responsible Wool Standard farm group and one of the largest globally.

The platform enables manufacturers to source independently certified wool with complete traceability back to the farm of origin, providing greater confidence in both fibre integrity and supply chain transparency.

Forward Buying Gains Momentum

As Australian wool production remains constrained, many manufacturers are reassessing traditional purchasing strategies.

Rather than relying solely on weekly auction offerings, increasing numbers of processors are using forward purchasing arrangements to secure fibre well before it reaches the auction market.

According to David Martin, General Manager, Fox & Lillie, the shift reflects changing priorities across the industry.

100% RWS Wool
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CB-CUC-1124145

"With Australian wool production expected to remain constrained, weekly auction offerings are becoming less predictable, while demand for specific micron ranges and certified wool can quickly exceed available volumes," he says.

Manufacturers with production schedules extending many months ahead are increasingly seeking greater certainty over both supply and specification.

"Forward purchasing allows processors to lock in supply before wool reaches the auction market, reducing procurement risk and providing greater certainty for manufacturing programs," Martin says. "It also enables closer collaboration with exporters to secure specific fibre specifications, delivery schedules and certification requirements."

Forward contracting is increasingly being viewed as an important risk management tool. Beyond helping manage price exposure, it provides manufacturers with greater confidence that the required fibre will be available when production demands it.

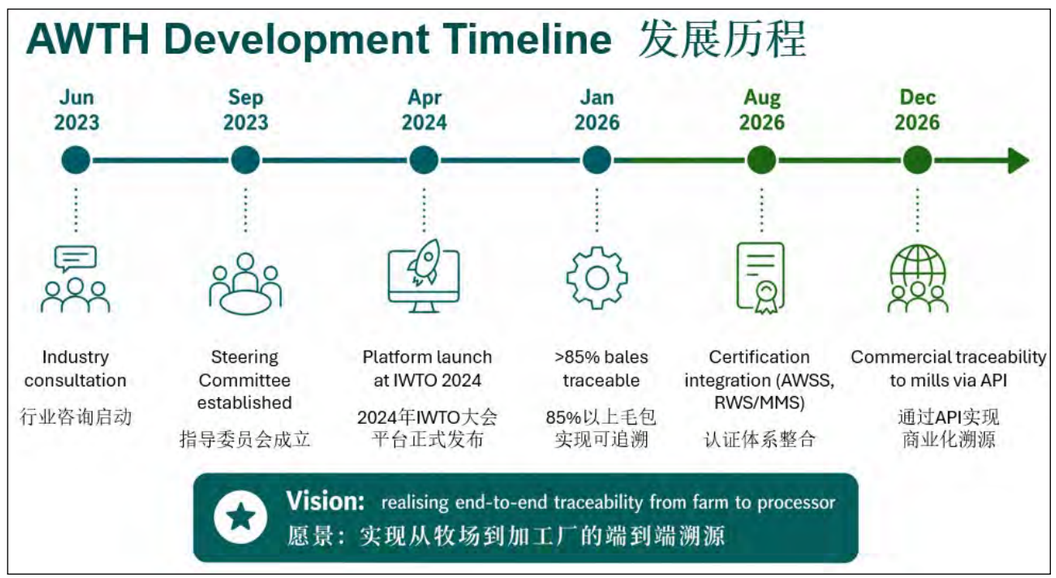
As Australian wool supplies remain historically tight and security of supply is becoming a strategic consideration for manufacturers around the world, companies able to combine broad sourcing capability, verified traceability and long-term grower relationships are likely to play an increasingly important role in helping the global textile industry secure access to premium Australian wool.

"At Fox & Lillie, we are well positioned to help our customers navigate these challenges. By combining our grower network, export capability and Genesys traceability platform, we can provide the supply security and sourcing confidence that manufacturers increasingly require in a constrained global wool market,' David Martin concludes.

FROM INDUSTRY CONCEPT TO OPERATIONAL TRACEABILITY SERVICES

The Australian Wool Traceability Hub (AWTH or "the Hub") has moved from being an industry concept to an operational platform, that is already delivering value across the Australian wool supply chain. As an industry-supported initiative that is owned and operated by AWTA, the Hub was established to simplify the flow of wool provenance data, reduce data duplication and support two core industry objectives being (i) emergency animal disease preparedness and (ii) commercial traceability. By connecting verified data from growers through to exporters, the Hub provides a trusted digital record of Australian wool supply chains, while also supporting the industry's ability to respond quickly to biosecurity risks.

The major achievement over the past year has been the continued improvement in Property Identification Code declaration. By early 2026, the Hub was holding farm identification data for more than 85 per cent of bales in the system, creating a much stronger foundation for traceability and



AUSTRALIAN WOOL TRACEABILITY HUB

Traceability of Australian Wool from Farm Gate to First Stage Processing



www.awth.com.au

emergency disease response. Broker adoption has been especially important, supporting a mandate enforcing PIC declaration on all grower wool as a condition of certification, effective from January this year.

This progress is particularly important because the PIC is the starting point for meaningful traceability. It identifies the property from which wool has originated and allows bale movements to be tracked from source to early-stage processing. In the event of an emergency animal disease outbreak, this information will support rapid trace-back and trace-forward activity by authorities, helping industry and government isolate affected wool and manage market risk.

The Hub is also entering a new phase of service delivery. Having established the centralised data platform, the AWTH is now transitioning from aggregating data to delivering industry services. These will include the supply of commercial traceability data, certification scheme integration (eg. AWSS, RWS/MMS) and other digital tools designed to reduce manual handling and improve the efficiency of wool supply-chain administration.

Certification integration is a major part of this next phase. AWTH is being developed to support programs such as the Australian Wool Sustainability Scheme, Responsible Wool Standard and other recognised certification schemes. The objective is to support existing schemes by automating the provision of trusted industry data to reduce duplication, lower administration costs and improve confidence in certified wool provenance.

This work is increasingly important as international brands, manufacturers and regulators demand stronger evidence of origin, sustainability and supply-chain integrity. AWTH has been designed to support these requirements by providing robust, structured data connections with trusted industry systems that enable traceability information to be shared subject to appropriate permissions.

For processors and mills, the Hub will provide new digital channels to access traceability information more efficiently. Currently, available data can be downloaded by wool exporters who have subscribed to the AWTH, while future development will support API (Application Program Interface) connectivity between AWTH and its users. This will permit authorised traceability data to move directly along the wool supply chain, reducing manual handling and improving the speed and reliability of information exchange.

Importantly, data governance remains central to the AWTH platform. Data sharing is authorised by the relevant supply-chain participant/owner. This protects sensitive grower and property information while allowing permitted traceability data to be passed on where it supports legitimate commercial, certification or regulatory purposes.

The Australian wool industry now has a national traceability platform with strong industry participation and more than 85 per cent bale-level traceability. The focus for 2026 is to elevate then convert that foundation into practical services that support biosecurity preparedness, reduce stakeholder certification burden and strengthen global confidence in Australian wool.

The message is simple: Australia already produces high-quality, sustainable and traceable wool. AWTH is helping make that data visible, verifiable and valuable to the world.



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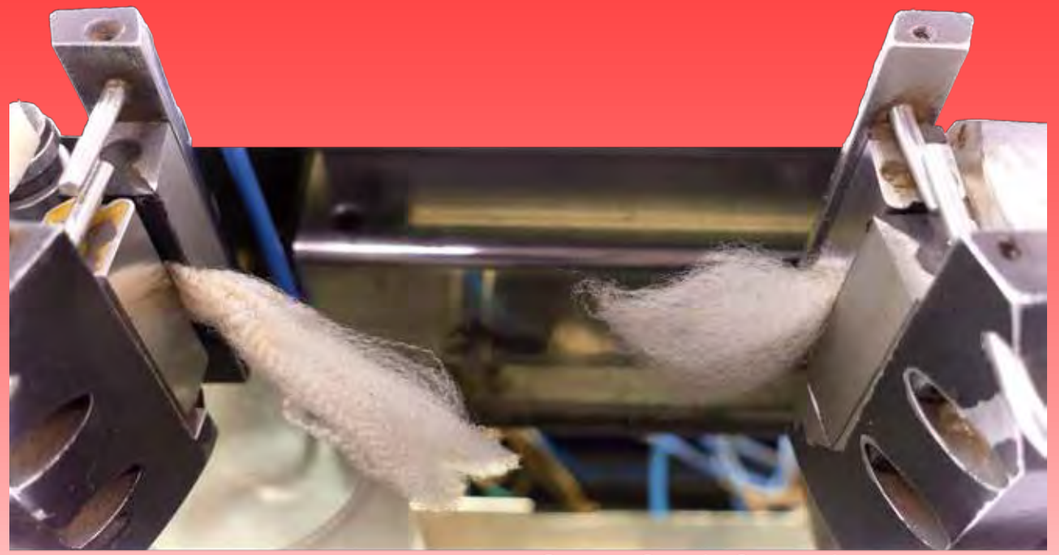

Greasy Staple Strength measurement

www.awtawooltesting.com.au

SUSTAINABLE CAPE WOOL STANDARD
V12 GOES FULLY DIGITAL

Sustainability requirements are increasingly complex, and brands and retailers are seeking reliable and verifiable sourcing solutions. Sustainable Cape Wool Standard (SCWS) provides a single, credible sustainability reference point for South African wool, helping businesses make clear and defensible sustainability claims.

'The South African wool industry has taken a significant step forward with the introduction of the SCWS, a voluntary industry standard that brings both commercial and communal wool production under a single, aligned sustainability framework,' says Deon Saayman of Cape Wools.

'For the first time, wool producers across South Africa can operate within a unified system that independently verifies ethical, environmentally responsible, and socially sustainable wool production practices. The result is a trusted sustainability benchmark that provides assurance to brands, retailers, processors, and consumers throughout the global wool supply chain.'



Deon Saayman

The latest Version 12 (V12) represents the fully digitised evolution of the standard, combining sustainability principles with advanced traceability technology.

At its core are four key pillars:

1. Digital traceability is delivered through blockchain technology, enabling secure data management and transparent tracking of greasy wool from farm to export. Farmers also gain access to digital clip profiles that benchmark wool quality, yield and faults against regional averages.
2. Animal welfare requirements ensure humane treatment of sheep through strict standards covering handling, housing, feeding, health management and shearing practices, while regulating painful husbandry procedures.
3. Environmental stewardship focuses on responsible grazing practices, soil conservation, biodiversity protection and restrictions on harmful chemicals and pesticides.
4. Social responsibility, promotes fair wages, ethical labour practices and safe working conditions for farmworkers and shearers. Importantly, the SCWS Communal pathway enables small-scale and communal farmers to participate in premium sustainable wool supply chains.

SUSTAINABLE | TRACEABLE | ETHICAL

The Sustainable Cape Wool Standard provides assurance of sustainable, traceable, wool by means of independant on-farm assesment through a unified sustainability framework for commercial and communal wool production in South Africa.

The South African wool industry provides a high-quality, environmentally sound product which meets the needs of the global textile industry.

CERTIFIED ISO 9001:2015 COMPANY

Cape Wools SA

www.capewools.co.za
capewool@capewools.co.za



The standard also aligns with international schemes such as Australia's AWSS, simplifying compliance for global trade.

'This is a great opportunity for users of South African wool, and in particular for brands, to directly access information about the wool used in the products they manufacture.'

Benefits for Brands and Buyers include:

- Confidence that animal welfare, environmental management, and ethical labour standards are consistently applied;
- Simplified due diligence across diverse supply chains;
- Independent verification of sustainability practices;
- Greater transparency and accountability throughout the wool value chain;
- A trusted framework that supports responsible sourcing commitments.

By providing one recognised standard across different production systems, SCWS reduces complexity while strengthening trust between producers and global buyers.

SCWS incorporates a robust digital traceability system that connects certified wool to its source and maintains that identity through processing. Each bale of certified wool is digitally identified at origin and linked to a secure traceability record. The system integrates GS1 global standards into a GS1 Digital Link, creating a structured, secure, and transparent method for sharing traceability events from producer to final buyer.

The traceability solution follows the internationally recognised GS1 Traceability Standard and uses the EPCIS v2 data standard. This enables buyers, processors, and supply chain partners to access standardised information about each wool bale, supporting trusted data exchange and improved transparency throughout the value chain.

'By combining sustainability verification with digital traceability, SCWS strengthens the position of South African wool in international markets and provides assurance that sustainability claims can be verified and supported by credible dat,' says Monica Ebert, Marketing Consultant, Cape Wools South Africa.

'The Sustainable Cape Wool Standard represents an important milestone for the South African wool industry. As global demand for transparent, ethical, and sustainable natural fibres continues to grow, SCWS provides the industry with a powerful platform to demonstrate the value and integrity of South African wool,' Monica Ebert says.

For further information on the Sustainable Cape Wool Standard (Version 12), supporting documents, and certification requirements, visit www.capewools.co.za

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HOW SOUTH AFRICAN WOOL BUILT A TRACEABILITY SYSTEM

The World Can Understand



By: Jaco Maass - SEO SDX Africa

> ***The wool industry made a strategic bet years ago, shaping how South African wool created a global traceability system***

For most of the past decade, "traceability" was a word the global textile trade used more often than it understood. Everyone agreed the data mattered. Almost no one could move it. Researchers have since given this contradiction a name: the AgData Paradox, the situation in which agricultural data is universally recognised as valuable yet remains locked in silos because the parties holding it cannot trust or communicate with one another.

The South African wool industry, through Cape Wools SA, recognised that problem early and made a deliberate decision about how to solve it. The system the industry runs today did not arrive in a single step. It came out of a journey that included one expensive lesson the rest of the world would learn only a few years later.

Starting with the obvious answer, and learning why it wasn't enough

Like much of the industry, Cape Wools SA first reached for blockchain. By then, the word had become shorthand for a real set of goals: trust, immutability, shared ownership of data, and the ability for different parties to exchange information without a middleman quietly controlling it. The technology itself was never the point. Those underlying problems were.

In the first phase of the project, the industry proved the concept could work. Using open-source integration tools, wool data was first structured into common business objects, such as customers, products, orders and shipments, and then committed to a blockchain node. On the South African side, it held together. The data was there, immutable, and ready to share.

Then the chain reached its next link, and the link broke. The buyers further along the value chain had no way to read what had been published. Onboarding each buyer's IT team to an unfamiliar technology across markets was never going to scale. And the obstacles were not purely technical. They had as much to do with the maturity of each trading partner's systems.

The best way to describe this is selling the first fax machine. A fax machine is worthless until someone else owns one. The industry had built a sophisticated way of sending information that the receiving end could not yet accept.

This was not a South African failure. It was the defining failure of enterprise blockchain almost everywhere. The clearest example is TradeLens, the blockchain shipping platform built by IBM and Maersk in 2018 and shut down in 2022. The technology worked. What never materialised was the industry-wide participation it depended on, partly because rivals were reluctant to join a platform part-owned by a competitor. Cape Wools had hit the same wall first, on a smaller stage, and took the right lesson from it.

The strategic turn: extend what already works

The realisation that reset the project was simple. Traceability is not a wool problem. It is a problem almost every industry is trying to solve, and one organisation has been solving it for half a century. So why redesign the wheel?

GS1, the not-for-profit body behind the barcode, has spent more than fifty years building the common language of global trade. Over two million businesses across 120 countries already use its standards every day. Those standards are based on three ideas: Identify, Capture, and Share. The modern version of the Share standard, EPCIS, is now a ratified international standard, ISO/IEC 19987:2024.

Choosing GS1 dissolved the fax machine problem. GS1 is the dial tone the world is already connected to. A buyer in Shanghai or Milan does not need to install anything new or be walked through an unfamiliar technology. They already speak the language. Interoperability stopped being something the industry had to sell, and became something that already existed (so the data could move and be read).



Identify: building on a foundation that the industry already had

The industry began where GS1 begins, with identity. Here, Cape Wools held an unusual advantage. Under the Marketing of Agricultural Products Act, Cape Wools manages and administers the statutory requirements for records and returns. The law requires brokers traders, processors, buyers, importers, and exporters to register, keep records, and furnish returns. In plain terms, the law already obliges the industry to tell Cape Wools where everyone is.

That mandate meant Cape Wools did not have to build a system to find every farmer. It already knew. The work was to express that existing identity in GS1's grammar, by assigning a Global Location Number to each farm and to each farming business.

At the same time, an unrelated crisis was pushing a neighbouring industry toward the same act. The Red Meat Industry Services of South Africa, which is dealing with biosecurity issues and the need to track animal movement, has begun allocating GLNs to locations from its side. Two industries with very different problems found themselves doing the same thing: mapping the country's primary producers with a single global identifier. A good crisis was not wasted.

This is where Landbouweekblad, the country's largest agricultural magazine, saw the opportunity and joined forces with Agrista, a tech company in South Africa. Together, they built a platform where a farmer can claim their farm and their business entity once, and own the result. The producer creates a digital identity that belongs to them, then decides which networks to share it with. A farmer no longer has to re-identify himself on every platform he deals with. Cape Wools then goes a step further, issuing each producer their own GS1 Company Prefix, so that identity travels with them into any other value chain they operate in.

That last point matters more than it first appears. The producer owns the identity. The industry body does not hold it hostage, so the system retains the producer's trust while still allowing the identity to travel.

Capture and Share: putting the transaction on the internet

With identity settled, Cape Wools structures the wool supply chain as EPCIS events that record the what, when, where, why, and how of every movement and transformation. Wool buyers now have standardised, GS1-compliant traceability data they can pass to their customers in any country, with no translation required.

The simplest way to picture the outcome is a chocolate cake. The baker has a Company Prefix that identifies the business, and the cake has a GTIN that identifies the product. Together they form the barcode you see in a supermarket. Scan it, and you learn that the cake exists and who made it. But a cake is made of flour, milk and sugar, each from a different supplier. That is the bill of materials. From 2027, as retail moves to 2D barcodes under GS1's Sunrise 2027 initiative, that barcode becomes a QR code carrying a Digital Link. Scan the link, and a resolver routes you to the relevant information, then onward to each ingredient's own Digital Link, where you find that supplier's identity and the events behind their product. This is the Digital Product Passport that European regulation is now writing into law.

The crucial design choice lies underneath it all. No one hands over their data. They hand over a link to where the data lives. The industry is not shipping ever-larger payloads of information from one party to the next; it is sharing pointers, and ownership never leaves the origin. Through the Digital Link, GS1 has enabled online business transactions, making the data useful without taking it away.

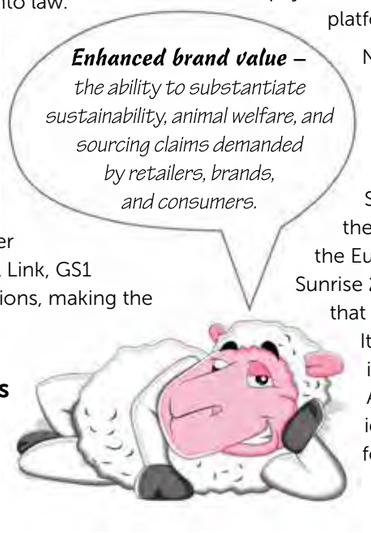
What structured data unlocks

Step back, and the strategic logic of the whole journey becomes clear.

The hard, unglamorous work was structuring the data to a recognised international standard. That single discipline is what now opens the doors everyone is talking about, because it turns traceability into usable value.

Because the data is structured and machine-readable, artificial intelligence (AI) can travel these routes and retrieve what it needs, whether that is an automated traceability report or a sustainability disclosure. Because the provenance is verifiable and anchored to GS1 identifiers, new forms of value come within reach: access to premium markets, supply-chain finance, and carbon credit programmes, all of which depend on trustworthy data drawn from many different hands. GS1, whose standards underpin the system, aligns its work with the United Nations Sustainable Development Goals, and those goals are increasingly where decisions on market access and climate finance are made.

This does not mean blockchain has been left behind. The industry's position is that blockchain will still play a real part in what comes next, but inside the GS1 standard rather than as the platform everyone has to log into. Its natural home is in certification and identity, where an immutable, independently verifiable record of who issued a credential and to whom is precisely what the technology excels at. The ledger stops being the system that the whole industry must adopt and becomes a single trustworthy layer beneath a standard the world already reads, so the payoff is broader adoption without forcing a platform choice.



None of this requires anyone to surrender their data. The same principle that solved interoperability is what makes these opportunities durable. The South African wool industry did the structuring work early, ahead of the European Digital Product Passport, Sunrise 2027, and the research community that named the paradox it was solving. It is a position very few commodity industries anywhere can claim. And it came from one patient's idea: get the data right, and the rest follows.

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RELIABLE WOOL SUPPLY

from Peruvian Company



Jose Iturriaga

Global wool markets have undergone significant change over the past two decades. Flock reductions in traditional producing countries, changing agricultural priorities, evolving consumer demand and increasing supply chain expectations have all contributed to a more complex sourcing environment for processors, manufacturers and traders.

As a result, buyers today are looking for more than simply fibre specifications. Reliability, consistency and long-term supply relationships have become equally important factors when selecting supply partners.

Companies that continue to succeed in this environment are typically those that have invested years developing strong relationships throughout the supply chain — from wool growers to processors and end users.

For more than twenty years, Tirzay Company has specialised in sourcing, classing and exporting Peruvian wool to customers across Europe, Asia and other international markets. Throughout this period, the company has focused on building long-term relationships that provide customers with dependable access to quality wool and consistent commercial support.

"Our business has never been based on individual transactions," says Jose Iturriaga, Director of Tirzay Company. "We have always believed that sustainable business is built through trust, consistency and long-term cooperation. Those principles guide our relationships with both wool growers and customers."

Based in Peru, Tirzay works directly with wool producers across the Andean region, developing relationships that have often been maintained for many years. This direct involvement allows the company to understand production conditions, monitor quality and prepare wool according to the specific requirements of international buyers.

Over more than two decades, the company has developed an extensive network of wool growers throughout the Peruvian Andes. These long-term relationships provide Tirzay with direct access to production while helping ensure continuity, consistency and reliability for customers.

The Peruvian Andes provide a unique environment for sheep production. High-altitude grazing systems, relatively dry climatic conditions and traditional livestock management practices contribute to wool that is valued for its brightness, sound staple characteristics and low levels of vegetable matter contamination.

Most wool supplied by Tirzay originates from crossbred sheep combining Corriedale and Merino genetics. The resulting fibre profile offers an attractive balance between softness, durability and processing versatility.

Typical specifications range from 24 to 26 microns, with staple lengths of approximately 65–75 mm and average scoured yields around 62%, making the wool suitable for a broad range of applications, including apparel, knitwear, hand-knitting yarns, interior textiles and selected carpet products.

However, fibre specifications alone do not create successful long-term supply relationships.

"In the wool trade, quality may secure the first shipment," says Iturriaga. "Consistency secures the next ten years."

This philosophy has shaped the company's approach to sourcing, preparation and customer service. Wool is collected from numerous producers and consolidated into commercial lots according to customer requirements before being classed and prepared for export. This process allows Tirzay to deliver greater consistency from shipment to shipment while maintaining flexibility across different market segments.

Having supplied customers across multiple international markets for more than twenty years, Tirzay has developed a detailed understanding of the technical and commercial requirements of different sectors of the wool industry. This experience enables the company to respond to changing market demands while maintaining the consistency that customers expect.

Many Peruvian shearers use the internationally recognised Tally-Hi shearing method, and there is no mulesing practiced in Peru. Combined with the traditional livestock management systems of the Andes, these characteristics are increasingly valued by customers seeking responsible and transparent supply chains.

As transparency and traceability continue to gain importance throughout the global textile industry, Tirzay has invested in strengthening relationships with growers and improving supply chain visibility.

"Complete traceability remains a developing area within the Peruvian wool sector," says Iturriaga. "However, by working directly with producers and maintaining close control over sourcing and logistics, we are able to offer selected programs that provide greater transparency and confidence for our customers."

All wool exported by Tirzay is independently tested by the New Zealand Wool Testing Authority (NZWTA), providing internationally recognised quality verification. The company is also a member of the International Wool Textile Organisation (IWTO), reflecting its commitment to internationally recognised industry standards and best practices.

As global supply chains continue to evolve, manufacturers and processors increasingly seek suppliers capable of offering not only quality fibre, but also reliability, responsiveness and long-term commitment.

The wool industry will continue to change. Markets will evolve, supply conditions will fluctuate and customer requirements will develop. Yet the foundations of successful business remain unchanged.

Trust, Consistency, Long-term commitment

For more than twenty years, these principles have guided Tirzay Company and continue to define its relationships with wool growers, processors, manufacturers and trading partners around the world.

Rather than focusing on individual shipments, Tirzay remains committed to building enduring partnerships and providing customers with reliable access to quality Peruvian wool for years to come.

For further information contact: Jose Iturriaga
sales@tirzaycompany.com



URUGUAY ADJUSTS *to Shifting Global Demand*



D'jalma Puppo and Margarita Cortabarria

According to Textile Exchange data, approximately 43% of Uruguay's wool production in 2024 was certified under the Responsible Wool Standard. Certification levels are even higher within the fine wool sector, which has become an increasingly important component of Uruguay's national clip.

Internationally, Uruguay now ranks among the world's leading producers of RWS-certified wool relative to total production. Only the Falkland Islands, with approximately 66% certified production, recorded higher certification penetration rates.

Uruguay's certification level sits well ahead of South Africa, at 34%, Argentina (19%), Chile (16%), New Zealand (11%) and Australia (5%).

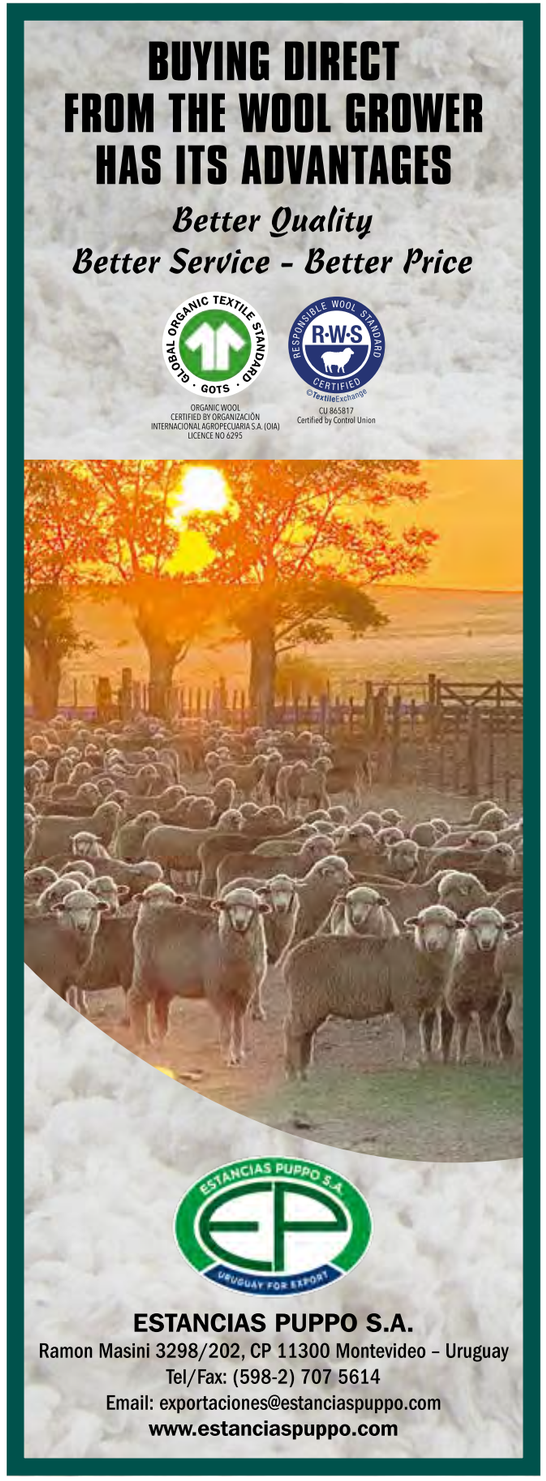
'This strong certification uptake is becoming a major competitive advantage for Uruguay's wool industry,' says D'jalma Puppo. 'Global fashion brands and textile manufacturers are placing greater emphasis on verified animal welfare standards, land stewardship and full supply chain transparency. As a result, certified fine wool is increasingly attracting stronger commercial interest, particularly from European and luxury apparel markets.

'At Estancias Puppo we have responded by expanding our network of certified growers and increasing purchases of high-quality RWS-certified fine wool. This strategy has enabled us to significantly increase the volume of certified wool available for export while strengthening relationships with international processors seeking reliable long-term supply.'

While the company handles all wool types, its core strength lies in premium fine wool selected for high-end apparel manufacturing. Increasingly, international buyers are demanding direct access to these higher-value raw wool lines, especially those carrying sustainability certification. For the last 10 years Estancias Puppo has ranked as Uruguay's largest exporter of greasy wool, supplying processors and traders across Europe and Asia.

To support long-term growth and rising export volumes, Estancias Puppo S.A. completed a major infrastructure investment in 2024 with the development of a new 4,500-square-metre warehouse dedicated exclusively to raw wool exports.

Strategically located near the Port of Montevideo, the facility was designed to improve logistics efficiency, storage capacity and fibre handling. The warehouse incorporates modern wool preparation systems and operates largely on clean energy, reflecting the company's broader focus on sustainability and operational efficiency.





RWS wool at Estancia Puppo warehouse ready for export

The investment also includes expanded workforce training programs aimed at improving wool handling, classing and export preparation standards.

D'jalma Puppo comments, 'Uruguay's wool export sector is undergoing a notable transformation, with greasy wool shipments increasing sharply as global processors seek direct access to high-quality, traceable fibre supplies.

'Long recognised as one of Uruguay's most important agricultural export industries, wool continues to play a significant role in the country's rural economy and international textile trade. Over the past two decades, Uruguay has built a strong reputation for producing fine and superfine wool with high standards of animal welfare, traceability and fibre preparation.

'Between 2004 and 2023, Uruguay's wool exports were dominated by wool tops, which accounted for 61.6% of total exports on a greasy wool equivalent basis. Greasy wool represented 21.6%, while scoured wool made up 16.8% of exports.

'However, export patterns have shifted significantly in recent years,' D'jalma Puppo adds. From 2020 to 2023, greasy wool exports expanded steadily, accounting for 31.7% of total wool exports, while scoured wool represented 20.9% and wool tops declined to 47.4%. The trend accelerated further in 2024, when greasy wool exports rose to 45.5% of total wool exports, overtaking tops at 31%, while scoured wool accounted for 23.5%.

'The changing export mix reflects broader developments in the international wool trade. More overseas processors are now purchasing raw wool directly to maintain tighter control over fibre processing, traceability and sustainability credentials throughout the supply chain. Demand has also strengthened for fine and superfine wool suitable for premium apparel and luxury textiles,' he says.

'Uruguay has positioned itself well within this evolving market due to its strong traceability systems, relatively low contamination rates and growing adoption of internationally recognised sustainability standards.

'Uruguay's wool sector is also benefiting from broader shifts within the global textile industry. As synthetic fibre markets face growing environmental scrutiny, demand for natural, renewable and biodegradable fibres, such as wool, is improving. Fine wool, in particular, continues to attract attention for its performance characteristics, durability and sustainability profile.

'Although global wool markets remain subject to economic volatility and fluctuating demand from China and Europe, Uruguay's focus on premium fibre quality, certification and export efficiency is helping position the industry for long-term growth.'



THE BRITISH WOOL MARKET

A Reset in Strong Wool?



Andrew Hogley

After several difficult years for strong wool growers, the market is finally showing signs of a more meaningful recovery.

Prices have improved significantly over the past twelve months, with core grades of British wool recently trading at over US$3.50 per kilo clean, compared with around US$2 per kilo a year earlier. That is a welcome shift after a long period of unsustainably low returns, but British Wool CEO Andrew Hogley believes the recovery needs to be seen in a wider context. In real terms, prices are only slightly ahead of where they were in 2018.

Even so, the tone of the market has clearly changed.

The recovery is not down to one single factor. Demand has improved as key end markets have performed well, particularly contract carpets, transport fabrics and interior furnishing fabrics. At the same time, there is renewed interest from brands and consumers in natural fibres, especially as awareness grows around the environmental impact of synthetic materials.

But the bigger story may be supply.

Strong wool production has fallen sharply over the past decade. Across the UK and New Zealand, breeding ewe numbers have reduced from around 35 million to 29 million, cutting strong wool production by approximately 20%. Look back further and the change is even more dramatic, with breeding ewe numbers in the UK and New Zealand falling from more than 60 million to fewer than 30 million over the last 40 years.

The stock position has also changed. In the years immediately after the pandemic, warehouses in both the UK and New Zealand were carrying large volumes of wool as major end markets closed or slowed down. British Wool carried a surplus of around 10,000 tonnes in 2020, while New Zealand had an estimated surplus of around 20,000 tonnes of strong wool.

Those backlogs have now cleared, exposing the underlying reduction in available supply.

"Strong wool prices have seen a recovery over the last twelve months," said Andrew Hogley, CEO of British Wool. "Prices have more than doubled, but this is not simply about demand improving. The supply of quality strong wool is simply not there. Production is down and stockpiles are empty."

British Wool's recent auction performance reflects that tighter market. After some weaker sales in March and April 2025, linked to concerns around potential US tariffs, the organisation has seen virtually full clearance at every sale over recent months. Similar



strength has also been seen in New Zealand, adding to the view that the market has moved into a much closer balance between demand and supply.

For UK farmers, the recovery is beginning to make a difference.

Payments for last year's clip, announced in May, showed improved returns and, for better wool types, covered the cost of shearing for the first time since the pandemic. If current prices hold, farmers with breeds such as Romney, Texel and Mule should see a return above the cost of shearing for the 2026 clip. Mountain wools, including Swaledale and Welsh Mountain, remain some way short of covering harvesting costs.

That distinction matters. The recovery is positive, but it is not yet being felt equally across all wool types.

"The last few years have been brutal for strong wool growers in both New Zealand and the UK," Hogley said. "It will take more than one year of good wool prices for sheep farmers, who are primarily producing lamb, to consider wool as an asset rather than a liability."

That loss of confidence is one of the biggest challenges facing the UK wool supply chain. In recent years, British Wool estimates that as much as 20% of the wool grown in the UK has not entered the supply chain, with some farmers choosing to leave wool on farm, or use it as animal bedding, because the return did not justify the cost and effort of delivery.

The growth of shedding breeds has added to that pressure, with British Wool estimating that 5% to 10% of the UK flock now carries shedding genetics. That further reduces the volume of wool available to the commercial market.

The outlook for strong wool therefore depends on more than demand alone. It also depends on whether farmers regain enough confidence to market their wool properly again.

British Wool's role remains central to that process. The organisation works on behalf of 30,000 UK sheep farmers, collecting, grading, testing and selling their wool in commercial volumes. Its ability to aggregate wool at scale gives manufacturers and exporters access to consistent supply, serving markets including China and the wider global trade.

The recent recovery is encouraging. Supplies have tightened, stockpiles have cleared, and demand is now better aligned with the amount of wool available. But the longer-term opportunity will depend on maintaining competition at auction, rebuilding farmer confidence and continuing to show manufacturers, brands and consumers why British wool remains a natural, traceable and high-performing fibre.

For strong wool, this may not simply be a short-term price lift. It may be the start of a much-needed reset.



WOOL EXCHANGE

Connecting Fashion with Fibre

For years, one of the biggest challenges facing British wool in the fashion sector has not been supply. It has been awareness.

While British wool remains widely used in carpets, interiors and technical applications, many fashion designers have little direct experience of the fibre, how it is produced or the range of products that can be created from it.

Increasingly, that is beginning to change.

Over the past three years, British Wool has developed a growing relationship with Central Saint Martins, one of the world's best-known art and design institutions. What started as a single event has evolved into an ongoing programme that brings together students, farmers, manufacturers, designers, brands and retailers to explore the opportunities for British wool in contemporary design.

The timing is significant. As fashion businesses face growing pressure to understand where materials come from and how they are produced, interest in natural fibres has increased. At the same time, there is renewed recognition of the importance of local supply chains and material provenance.



British wool sits naturally within these conversations, but many emerging designers have had limited exposure to the fibre during their studies.

Wool Exchange was created to help bridge that gap.

The first event, held in 2024, brought together around 150 guests from across the supply chain, including farmers, manufacturers, brands, academics and students. Since then, participation has continued to grow, attracting organisations ranging from heritage brands, such as Margaret Howell, Paul Smith and Vivienne Westwood, through to emerging designers and contemporary fashion businesses.

What makes the programme different is the range of voices involved. Students are able to meet the people who produce the fibre, while farmers and manufacturers gain insight into how the next generation of designers is approaching materials, sustainability and consumer expectations.

Berni Yates, Knowledge Exchange Lead for Fashion, Central Saint Martins commented, "One of the programme's strengths is the way it brings different parts of the supply chain together. Students meet the people producing the fibre, while farmers and manufacturers gain a better understanding of how the next generation of designers view materials and sourcing."

Haldi Kranich-Wood, Business Development Manager at British Wool, believes that exchange of ideas benefits everyone involved.

"Over the past few years, we've built a fantastic relationship with Central Saint Martins. Wool Exchange gives students a unique opportunity to engage directly with the people and businesses behind British wool, while giving our industry a fresh perspective from the next generation of designers and communicators."

The programme has also helped address some of the assumptions that continue to surround British wool. Historically, many fashion brands viewed it primarily as a fibre for carpets and interiors. Through direct engagement with designers and brands, British Wool has been able to showcase the breadth of products, yarns and fabrics already being produced within the UK supply chain.

That approach is already generating results. According to British Wool, they are seeing encouraging interest from brands that are keen to learn more about British wool first-hand, explore its potential and better understand the opportunities it offers within contemporary fashion.

The relationship is also expanding beyond fashion. British wool is now being used within several Central Saint Martin's teaching modules and discussions are beginning to explore opportunities within disciplines such as architecture and materials research.

Looking ahead, the programme is set to expand further through the introduction of an Innovation Day in 2026. Alongside the fashion-focused activities, the event will explore research, new material applications and knowledge-sharing between universities, brands and industry partners.

For British Wool, the long-term value of the relationship is straightforward. The future market for wool will depend on designers, brands and consumers understanding what the fibre can offer. Programmes such as Wool Exchange create opportunities to make those connections earlier, bringing future designers closer to the farmers and businesses that sit behind the material.

What began as a one-day event is gradually becoming something much more substantial: a practical way of reconnecting fashion with the fibre it depends on.



DRIVING THE FUTURE FOR STRONG WOOLS

By Victor Chesky

Sustainability is becoming increasingly important throughout the wool processing supply chain. Curtis Wool Direct (CWD) supplies greasy and scoured wool and tops to all sectors of the global textile industry, including carpet, hosiery, cloth, hand and machine knitting, bedding, and nonwoven applications. The company is a registered auction buyer of British Wool and remains its largest purchaser, buying more than 50% of Britain's annual clip. In addition to British wool, CWD sources and processes a wide range of wools, including Norwegian, New Zealand, Real Shetland, Irish, and other European origins.

CWD has invested heavily in environmental initiatives designed to reduce environmental impact while delivering more traceable and responsibly processed wool fibre. These investments are not simply cosmetic improvements — they represent significant, practical operational upgrades that reduce emissions, improve resource efficiency, and strengthen the long-term sustainability profile of wool processing.

I spoke with Daniel Isbecque, Joint Managing Director at CWD, about the company's new biological water purification plant installed earlier this year.

"Our new anaerobic digestion plant is designed to complement our existing effluent treatment system," says Isbecque. "Installed at our Haworth Scouring and Combing plant it uses naturally occurring microorganisms — effectively 'bugs eating the dirt' — to break down contaminants within wastewater generated during the wool scouring process and turn them into gas."

This biological treatment approach offers significant environmental advantages compared with more traditional chemical-based treatment methods. The system reduces overall chemical usage, improves wastewater quality, and significantly lowers water consumption through enhanced recycling capability.

"It is one of the first plants of its type built in the UK and demonstrates our commitment to modern, responsible manufacturing," he says.

Water management remains a critical issue, as wool scouring has historically been a water-intensive process. CWD's advanced effluent treatment and recycling systems allow a high proportion of rinse water to be reused within operations, reducing reliance on fresh water supplies and minimising environmental impact.

"Reducing chemical usage is equally important," says Isbecque. "Customers increasingly expect manufacturing processes to align with Environmental, Social and Governance (ESG) objectives, so investments that reduce water use and chemical dependency are essential for the future competitiveness of wool processing."

Alongside the biological purification plant, the company has also installed a Combined Heat & Power (CHP) system to generate electricity from the biogas produced.

"The system generates both electricity and process heat from the same energy source, allowing us to make much better use of fuel while reducing waste," he explains. "This lowers carbon emissions and reduces reliance on external electricity supplies."

For customers, these investments provide confidence that environmental performance is being actively monitored, managed, and independently verified. Certification also supports customers requiring documented environmental compliance and sustainability assurance throughout their supply chains.



Daniel Isbecque at Haworth Scouring and Combing plant in Bradford

The Anaerobic Digester and CHP unit support stronger ESG documentation, Environmental Product Declarations (EPDs), and alignment with standards such as BREEAM and LEED. The company's environmental infrastructure also helps customers reduce embedded carbon within finished products and improve Scope 1, Scope 2, and Scope 3 emissions reporting.



"Our customers expect us to deliver the wool they need year-round, quickly, competitively priced, and with consistently high quality," says Isbecque. "Now they can also be assured that British wool processed at Haworth Scouring has by far the lowest carbon footprint in the wool processing industry."

"Owning and operating our own scouring and combing facility is central to maintaining control over quality and logistics. It allows us to source and process a diverse range of wool types efficiently, often at short notice, for customers worldwide, while meeting increasingly demanding environmental standards."

"Partnering with Curtis Wool Direct provides more than fibre supply — it strengthens sustainability positioning, supports regulatory compliance and helps manufacturers meet growing customer expectations around responsible sourcing," says Daniel Isbecque.

New Package Dyeing in UK



Lewis Bedford

Package dyeing has become an increasingly important processing method across the textile industry, valued for its ability to deliver exceptional colour consistency, efficient processing and reliable production outcomes.

Package dyeing offers manufacturers excellent batch-to-batch colour consistency, uniform dye penetration, efficient processing of production-scale volumes and reduced yarn handling compared with many traditional dyeing methods. By dyeing yarn wound onto perforated packages, dye liquor circulates evenly through the material, ensuring consistent colour penetration and uniformity throughout the package. This controlled process enables precise shade matching while maintaining yarn quality, strength and performance. It also provides greater flexibility across a wide range of yarn types, counts and constructions, making it particularly attractive for manufacturers seeking dependable quality, repeatability and efficiency across large production runs.

Calder Dyeing has made a significant investment with its new dedicated package dyehouse housed within a new purpose-built facility. It has been specifically designed to deliver high levels of colour consistency, process control and operational efficiency, complementing Calder's existing operations while supporting future growth.

'The development marks an important milestone for the company,' says Lewis Bedford of Calder Dyeing. 'For more than 25 years we have built a strong reputation as a specialist commission dyer serving the carpet yarn sector. While our expertise has traditionally focused on hank and fibre dyeing for Axminster, tufted and woven carpet manufacturers, the new package dyehouse expands our capabilities and creates opportunities to serve a broader range of textile applications.'

Calder processes approximately 2.3 million kilograms of yarn and fibre annually. It has a capacity to manufacture 60,000kg of woollen spun and dyed yarn per week and exports over 65%.

'Carpet yarns remain at the heart of our business, but the package dyehouse enables us to support a wider range of textile sectors,' Bedford explains. 'We are actively exploring opportunities in finer knitting yarns, tapestry yarns and other specialist textile markets where colour accuracy and product quality are critical. The technical expertise we have developed through decades of dyeing carpet yarns provides a strong foundation for serving these sectors.'

The new dye house investment also strengthens Calder's ability to support customers with product development and bespoke dyeing solutions. Whether developing new colour ranges, matching complex shades or scaling up innovative concepts, customers can benefit from Calder's extensive technical knowledge and flexible approach.

'In addition, it allows customers to move seamlessly from laboratory trials and sample quantities through to full-scale production runs,' says Bedford. 'This provides greater confidence throughout the product development process and helps reduce time to market.'

'Our objective has always been to deliver the highest quality dyeing services while continually improving efficiency and reducing environmental impact. Our new dye service will support both existing and new customers with innovative, reliable and sustainable dyeing solutions for years to come,' Lewis Bedford concludes.

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Continuous investment in manufacturing technology is a cornerstone of Tecnomeccanica Biellese's (TMB) long-term strategy. The company's latest investment is a new high-precision CNC press brake equipped with a fully automated tool storage and tool-changing system—representing one of the latest developments in sheet metal bending technology.

Unlike conventional press brakes, where punches and dies are selected and installed manually, the new system automatically stores, retrieves and loads the required tooling according to the production programme. The result is dramatically shorter setup times, exceptional repeatability and greater manufacturing flexibility, particularly for customised production.

Representing a substantial share of the overall investment, the automated tooling system demonstrates TMB's commitment to advanced manufacturing. Together with high-power fibre laser cutting systems, robotic welding cells, CNC punching equipment and multi-axis machining centres, it enables the company to manufacture virtually every structural component and critical mechanical part of its machinery entirely in-house.

Maintaining in-house manufacturing does not mean relying on traditional production methods. On the contrary, it requires continuous investment in the latest technologies, enabling TMB to combine the flexibility of a specialist manufacturer with the efficiency and precision of a highly automated production facility.

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New Premises Mark Growth Milestone for Europa Wools

Europa Wools has entered a major new phase of growth with the relocation to significantly larger premises in Huddersfield, strengthening the company's ability to supply global wool markets while creating a dedicated showroom for customers and industry partners.

The move represents a significant investment in the future of the business and reflects growing demand for natural fibres across apparel, interiors, technical textiles and specialist wool applications.

'As buyers place greater demands on textile suppliers, consistency, flexibility and sourcing expertise are more important than ever,' says Europa Wools Director Richard Morsley. 'We marry global sourcing with local expertise, and our new premises give us the space and infrastructure needed to support continued growth and deliver an even higher level of service to customers.'



Richard Morsley at Europa Wool's warehouse in West Yorkshire



Located in one of the UK's historic textile manufacturing centres, the new Huddersfield facility provides substantially increased warehousing and operational capacity. According to Richard Morsley, securing a suitable site was a lengthy process.

'Large industrial premises of the scale we required are becoming increasingly difficult to secure in this area. It took seven years to find the right property, so this move marks a very important milestone for our company.'

The new premises allow Europa Wools to increase stockholding capacity, improve logistics and handling efficiency, and create greater operational flexibility across its sourcing and distribution operations.

A key feature of the relocation is the development of a new showroom, designed to provide customers with a dedicated space to view and assess wool qualities, fibre origins and micron ranges firsthand. The showroom highlights the breadth of Europa Wools' offering and reinforces the company's focus on customer service and technical support.

Europa Wools remains one of the UK's largest stockists of New Zealand wool in the 22.5 to 38 micron range, and also carries



significant quantities of Australian carbonised lambswool from 20.5 to 27.5 micron. The company specialises in New Zealand, Australian, British and Falkland wool, while also sourcing and stocking scoured wool from South Africa, South America and Europe. Combed wool tops form another important part of the business.

'Our focus continues to be on holding stock for customers,' says Richard Morsley. 'We effectively act as a fibre bank, storing wool until it is required for production. Customers can secure a fixed price for a set period while only paying for the quantities they actually take. It allows manufacturers to secure supply without carrying unnecessary stock costs.'

Europa Wools also supplies speciality fibres, including silk, alpaca, mohair and cashmere in scoured form, combed tops and noils.

'By maintaining a diverse stock profile, we can supply fibre tailored precisely to individual production requirements,' Richard Morsley explains. 'If a particular wool is not immediately available from stock, our global supplier network allows us to source specific grades efficiently and competitively.'

In addition to fibre supply, Europa Wools operates a small spinning plant with a production capacity of around six tonnes per month, focusing on smaller batch runs often not offered by larger manufacturers.

The company can comb most natural fibres and create bespoke blends combining natural and synthetic fibres. Custom gill blending services are available from as little as 10kg through to large production runs.

Europa Wools also spins on both woollen and worsted systems, producing weaving and knitting yarns in a wide variety of blends and specifications. Services include cone winding, hank reeling and balling for hand knitting yarns.

'The relocation to our new, larger premises reflects not only our sales growth, but also our confidence in the long-term future of wool,' says Richard Morsley. 'Demand for natural fibres continues to strengthen, and we have positioned the business for the future.'



BRITISH WOOL AND HARRIS TWEED HEBRIDES

A Shared Story of Provenance and Place

For Harris Tweed Hebrides, wool is more than a raw material. It underpins a textile tradition shaped by the landscape, skills and communities of the Outer Hebrides. Through its long-standing relationship with British Wool, the company can trace that tradition back to the crofters and farmers who produce the fibre, reinforcing the value of a natural and renewable resource.

The partnership reflects a shared commitment to provenance, quality and the continued relevance of British wool in premium textile manufacturing. In a market increasingly shaped by questions around origin, sustainability and transparency, it provides a strong example of how traditional supply chains can respond to modern brand expectations.

"The relationship with Harris Tweed Hebrides is exactly the kind of partnership British Wool wants to champion," says Graham Clark, Marketing Director at British Wool. "It links British farmers with a world-class textile product recognised around the world. It also demonstrates that British wool can meet the expectations of today's brands, providing clear origin, strong performance and confidence in how the fibre is sourced and managed."

A supply chain rooted in British farming

British Wool collects, grades and sells wool on behalf of UK sheep farmers, creating a structured route to market for a fibre that begins on farms across the country. For brands such as Harris Tweed Hebrides, that system provides access to graded British wool supported by clear processes, documentation and expertise.

Once graded, the wool is blended and scoured before travelling onwards to the Outer Hebrides, where it becomes part of a production process that combines fibre dyeing, yarn production, handweaving and finishing to create the iconic Harris Tweed® cloth.

"Our customers want to understand where materials come from, how they are managed and what they represent," says Margaret Ann Macleod, CEO of Harris Tweed Hebrides. "British wool allows us to explain where our materials come from in a way that is authentic, practical and rooted in the people and businesses behind our cloth.

"Harris Tweed is known globally, but it is also very local," says Macleod. "It belongs to the Outer Hebrides, to the people who make it and to the wool supply chain that supports it. Working with British Wool helps us maintain that connection from farm to finished cloth, while giving customers the reassurance they need in today's market."

Explaining the UK context

As global brands place greater emphasis on assurance schemes and certification, British Wool and Harris Tweed Hebrides also have an important role to play in explaining the UK context. Some international standards have been developed with very different wool-producing regions in mind and do not always reflect the structure, regulation or farming practices already in place in the UK.

That means the partnership is not only about supplying fibre; it is also about helping customers understand why British wool should be assessed on the strength of its own system. The UK's farming, animal welfare and traceability frameworks provide a credible basis for reassurance, but they often need to be explained clearly to customers who are used to applying global standards as a default benchmark.

"We often have to help brands understand that a standard created for one part of the world may not be the right way to judge British wool," says Clark. "The UK already operates within a highly regulated farming environment, and our job is to explain that clearly, confidently and with evidence. Partnerships like this give us a practical example of how British wool can meet modern expectations without losing sight of the system it comes from."

Supporting farmers, craft and quality

At its heart, the relationship between British Wool and Harris Tweed Hebrides is about more than supply. It is about shared values: protecting provenance, supporting farming communities, maintaining textile skills and ensuring that wool continues to be understood as a relevant material for modern markets.

For British Wool, Harris Tweed Hebrides demonstrates how wool grown by UK farmers can support a premium product with global reach. For Harris Tweed Hebrides, British wool adds further value to the finished cloth, reinforcing its links to UK farming and the natural characteristics that customers increasingly appreciate.

"The future of wool depends on partnerships that connect the whole story," Macleod says. "Customers increasingly want to understand how products are made, who is involved and where the materials come from."

Clark agrees: "This is a partnership that shows British wool at its best. It supports farmers, underpins a remarkable textile tradition and gives brands a clear, credible story to share."

From farm to fabric

The relationship between British Wool and Harris Tweed Hebrides demonstrates how UK sheep farming and traditional textile manufacturing continue to support one another. It brings together a natural fibre, skilled craftsmanship and a globally respected fabric. In a market where customers increasingly want confidence in the materials they buy, it provides a compelling example of how British wool continues to deliver value throughout the supply chain.

Q&A

With **Ronnie Danon of G. Modiano, Turkey**

OPPORTUNITIES

Challenges and the Future

Turkey continues to strengthen its reputation as a major global supplier of wool textile products and value-added manufacturing, supported by its strategic geographic position, strong textile infrastructure, and increasingly sophisticated production capabilities.

We speak with Ronnie Danon of G. Modiano, Turkey about the current state of Turkey's wool export sector, the opportunities emerging in global markets, and how Turkish companies are adapting to changing customer expectations around sustainability, flexibility, and quality.

'Turkey has long been an important player in the global wool and yarn supply chain, with strong connections to textile manufacturers across Europe and Asia. However, the industry has recently faced significant challenges, including high inflation, an overvalued currency, very high Turkish lira and foreign currency interest rates, and limited access to credit,' he comments.

'Cost-sensitive sectors, such as garment making and knitwear manufacturing, have been affected most severely, with the slowdown extending into spinning and weaving. Over the past three to four years, many textile companies have closed and large numbers of workers have lost their jobs due to reduced competitiveness, overcapacity, and intense competition from other parts of Asia.



A number of Turkish textile companies have moved their manufacturing facilities to Egypt and some others are in the process of doing so.

One important advantage the industry still maintains is the presence of a strong local supply chain for both raw materials and production auxiliary materials.

In addition, Turkish textile manufacturers are increasingly following European manufacturers in adopting traceability, sustainability certification, and environmentally responsible production practices when sourcing wool and other fibres. This transition is being driven largely by the increasingly strict requirements of international retailers and brands.



The automated yarn spinning and winding production line at Akal Tekstil's manufacturing facility

Q. What strengths does Turkey's textile industry offer international customers?

Turkey has substantial manufacturing capacity and a strategic geographic location that provides a major advantage in supplying Western Europe and the Middle East with shorter lead times.

Most Turkish textile companies that survived the recent difficult economic conditions are privately owned small- and medium-sized enterprises, although several large companies also remain active. Family ownership and management structures give many businesses the flexibility to adapt quickly to changing supply and demand conditions.

Wool manufacturing has historically been one of the pioneering sectors of the Turkish textile industry. State-owned wool factories were established from the 1930s onward, followed by major privately owned mills from the 1950s onward. This long manufacturing tradition has helped create a highly skilled workforce capable of producing sophisticated textile products.

For European markets, a key advantage is Turkey's geographic proximity, allowing for faster lead times and more responsive service. Family-owned businesses are also well positioned to provide customised products and respond quickly to retailer requirements.

Another important strength is the industry's ability to efficiently produce smaller order volumes, something many competing regions struggle to offer.

In the handknitting sector, Turkey remains a global leader in wool and wool-blend yarns, supported by strong in-house research and development capabilities that enable manufacturers to lead trends rather than follow them.

As a NATO member, Turkish wool product suppliers are also eligible to participate in procurement tenders for the armed forces of both the United States and European countries.

Q. How is the Turkish wool industry responding to global economic pressures?

Like many international competitors, Turkish manufacturers are dealing with global economic challenges including inflation, freight costs, and changing trade conditions. However, Turkish companies must also contend with additional local economic pressures as well as very aggressive trade practices from competitors further East.

The companies that have remained successful are generally well-capitalised businesses that have invested in productivity, maintained strict cost controls, and adopted proactive marketing and sales strategies.

Today, companies that have successfully navigated recent challenges are robust, flexible, and highly responsive. They remain competitive through the combination of service, product quality, and speed they can offer international customers.

Turkish manufacturers are also willing and able to participate in traceable, sustainable, and responsible supply chains. The broad range of certifications and accreditations achieved by the Turkish textile sector was clearly demonstrated at the recent 22nd International Yarn Fair and Texhibition — the Fabric, Yarn and Textile Accessories Fair —, both held recently in Istanbul.

TÜRKIYE

by Beyza Gündüz in Istanbul



TÜRKIYE'S WOOL TEXTILE SECTOR ADAPTS TO A CHANGING WORLD

Türkiye's wool textile sector is undergoing a pivotal transformation. Buffeted by inflationary pressures, shifting global demand, and intensifying international competition, the industry is doubling down on what it does best: speed, quality, and flexibility, the very attributes that have long set Turkish manufacturers apart.

"The Turkish textile sector has a strong manufacturing infrastructure, an integrated industrial structure, high-quality standards and rapid delivery capability," said Ahmet Şişman, board chairman of İTHİB, the Istanbul Textile and Raw Materials Exporters' Association. "Türkiye is one of the top five countries in the world in wool fibre production. But beyond raw output, what distinguishes us is the ability to offer quality, flexibility, design capability and short lead times simultaneously."

That combination is increasingly valued in a European market where brands are moving away from bulk, long-lead-time sourcing in Asia. Türkiye has emerged as a key near-shoring hub for European fashion and textile buyers, and nowhere is this more apparent than in the wool segment.

A Strategic Position in the Global Wool Chain

Türkiye occupies a rare position in the global wool supply chain: it is active at every stage of production, from raw fibre processing through to finished garments. The country produced approximately 43,000 tonnes of wool in 2023, ranking fourth globally, with major production regions in Central Anatolia, Eastern Anatolia, and the Aegean. Its sheep population stands at around 43.4 million, placing it seventh in the world.

Yet Türkiye's wool ambitions extend well beyond its domestic clip. The country imports 10,000 to 11,000 metric tonnes of raw wool annually, primarily from Australia, New Zealand and South Africa, to feed a sophisticated textile manufacturing sector that exports processed yarn, fabric, and finished goods worth more than USD700 million annually., made from wool or wool blends, said Şişman.

Dalena White, secretary general of the International Wool Textile Organisation



Bahadır Aksoy, Akal's general manager, pictured at the company's state-of-the-art spinning facility

(IWTO), underscores Türkiye's broader significance: "The industry remains a vital source of wool textile production in Europe and continues to invest in innovation and skills development, cementing its relevance in the global supply chain. Industry members display solid resilience in the face of ongoing global competition and have optimised their market advantages: smaller minimum orders, shorter lead times, agile and eco-friendly manufacturing practices, and reduced carbon miles to European retailer warehouses."

Türkiye has been an IWTO member since 1977, with the national committee managed by the Turkish Textile Employers' Association (TTEA). In November 2024, the IWTO held its annual Wool Round Table in Istanbul, a symbolic recognition of Türkiye's enduring centrality to the global wool industry.

Speed and Scale: The Near-shoring Advantage

In an era of compressed fashion cycles and just-in-time inventory, Türkiye's geographic proximity to Europe (indeed 3% of the country, including the heart of its largest city, Istanbul, is in Europe), is a tangible commercial asset. Şişman frames the competitive dynamic clearly: "World woollen fabric exports are approximately USD2.6 billion, with roughly half generated by Italy alone. So, in the woollen fabric segment, we compete directly with Italy, a country with extraordinary brand equity. But Turkish manufacturers can respond to changing collection needs, short season cycles, and smaller order quantities more nimbly than any distant production centre."

This agility is not incidental; it is structural. Türkiye's wool yarn manufacturing sector includes approximately 110 companies employing over 8,000 people, with major production hubs in Bursa, Gaziantep and Uşak. Among them, Akal İplik stands out as a remarkable story of consolidation and scale.

Founded in 1973 as part of the Akkök Holding, AKAL was acquired by Erdemoğlu Holding in 2011, at which point it produced around 750 tonnes of blended wool-and-acrylic and acrylic yarn per month and accounted for roughly 10% of Türkiye's output in its segment, according to Erdemoğlu Holding's official corporate history and acquisition disclosures. Today, operating across two locations, the company produces over 4,000 tonnes of blended wool-and-acrylic and acrylic yarn per month, representing approximately 70% of domestic production of this output.

"We export to more than 35 countries," said Bahadır Aksoy, Akal's general manager. "We can produce from 1 kg to 10 tonnes per colour or quality, with over a hundred quality specifications and unlimited colour options. Flexibility and service capability are central to everything we do."

Aksoy is candid about recent headwinds: high inflation (32% in May), elevated interest rates (benchmarked at 37% in June) and a weaker Turkish lira (TRL) have significantly increased cost pressures. Indeed, USD1 bought TRL32.50 in July 2024, compared to TRL46 this June (2026). These pressures have particularly increased labour costs. But Aksoy's response is emphatic: "We are not considering moving production abroad. All our investments are going into our factories here in Türkiye. In this environment, our focus is on efficiency, automation, digitalisation, and higher value-added production."

Wool Processing: Building a Local Quality Standard

A key challenge facing Turkish wool manufacturers is the quality gap between domestic and imported wool. While Türkiye produces significant volumes, its native sheep breeds, including Kıvırcık, Karayaka and Akkaraman, yield coarser fibres less suited to high-end apparel applications than the fine merino wools sourced from Australia, New Zealand and South Africa. Imported wool typically arrives in Türkiye already scoured or in top form, reflecting both the economics of bulk transport and the established processing infrastructure in the source countries.

Akel Tekstil, one of Türkiye's largest wool scouring operations, is working to close that gap on the domestic side. "Our main activity is processing and scouring domestic wool from Turkish sheep to international standards," said board member Barış Gelenbe. "We are bringing Turkish wool to a quality level that can serve as an alternative to imported fibres for textile, carpet, and technical applications." Akel's scouring line runs 66 metres in length, with eight baths and a width of 3.25 metres, capable of producing 2.5 tonnes of clean scoured wool per hour.

Gelenbe points to slow but meaningful progress in breed improvement: "In our discussions with sheep and goat breeding associations in recent years, we have seen gradual advancement in work on improving sheep breeds. These developments are particularly important for raising the quality of Turkish wool in the long term." On sustainability, Akel has invested heavily; solar energy now covers a sizeable portion of its electricity needs, and water usage in scouring has been



Omer Ozden (left) and Baris Gelenbe Akel Tekstil

reduced from a ratio of 20 litres of water per 1 kg of processed wool to 15 litres water for 1 kg wool, with a target of 10 litres water to 1 kg wool.

İTHİB's Şişman echoes the strategic importance of upgrading domestic supply: "Raising the quality standard of domestic wool, improving traceability, and making it processable at the the quality needed by manufacturers is of great importance."

He cited two projects as making a difference in output quality, elevating the profile of Turkish wool and fibre. One is the Türkiye Dokuma Atlası Project, which documents and catalogues Anatolia's traditional weaving heritage by region, with the aim of preserving and authentically reproducing these textiles. The other is the Ankara Angora Goat Workshop, organised under İTHİB's auspices, focused on reviving the Ankara Angora goat population and reintroducing traditional Angora fabric to production.

Carpet and Knitwear: The Export Pillars

Türkiye's wool textile exports rest on two principal pillars: carpets and rugs; and wool knitwear and apparel. Konya-based

Kaplanlar Tekstil, with over 100 years of wool heritage and a 'Strøygarn' spun lambswool yarn capacity of 7.5 tonnes of dyed yarn per day from nine modern carding machines, supplies the Turkish weaving and knitwear sectors with lambswool, cashmere, mohair, alpaca and blended yarns under its Lanafil brand. The company holds OEKO-TEX, GOTS, GRS, OCS and RWS certifications, reflecting growing buyer demand for verified sustainability credentials.

In hand-knitting yarn, the ORMO Group is Türkiye's dominant force. Founded over 50 years ago and now operating a 200,000 square metre facility in Orhangazi with 1,500 employees, ORMO exports 70% of its production to more than 70 countries through its Nako and Bonbon brands.

Navigating Macroeconomic Turbulence

Despite these strengths, the past three years have been punishing for Turkish wool yarn producers. A combination of high interest rates, currency volatility, inflationary cost pressure, and sluggish global demand has compressed margins and eroded capacity utilisation across the sector. Şişman acknowledges a 5% decline in wool product exports in 2024 due to market contractions and high production costs. That year, Türkiye's wool fibre exports reached USD18 million, wool yarn exports USD49 million, and, encouragingly, woollen fabric exports rose 10% to USD34 million, according to Şişman. For smaller operators, the pressures have been acute.

Bekir Ateş, owner of Ateş İplik, an Istanbul-based wool yarn producer, describes the bind many yarn producers face: "We have the fast delivery advantage compared to Europe, but unfortunately, we've lost scale. Orders have become very small and fragmented, too small to source raw materials efficiently or to reach minimum viable production quantities."

He warns of a structural pattern familiar from the decline of Britain's wool textile industry in the mid-twentieth century: scouring closes first, then spinning, then weaving and garment making. "In Gaziantep, which was once Türkiye's biggest yarn production centre, I estimate current output is running at around 25 percent of levels three years ago."

Aksoy of AKAL is more optimistic, but stresses that survival requires adaptation. "High inflation has reduced demand. High interest rates increased financial costs. A weaker lira pushed up labour costs in dollar terms to levels not seen in recent history. These are the conditions we face, and our job is to compete within them, not to relocate."

Technology, Innovation, and the Path Forward

Across the sector, the response to cost pressure is converging on a common answer: move up the value chain. Whether through automation, sustainability certification, product innovation, or brand development, Türkiye's wool manufacturers are clear that competing on price alone is not a viable strategy.

Şişman frames the industry's forward direction: "The key factors that will strengthen our competitiveness in woollen textile products will be quality standards, traceability, sustainable raw material use, flexible production, fast delivery, and high value-added product development capability."

While some Turkish-owned garment production has shifted toward nearby lower-cost markets such as Egypt, the core textile and yarn manufacturing infrastructure, with its great skills base and integrated supply chains, remains firmly anchored in Türkiye, he stressed.

The IWTO's Dalena White shares that assessment. "We treasure the Turkish textile industry as a key role player in the global wool supply chain," she said, "and believe this industrious nation will overcome short-term challenges to remain prosperous and relevant in the future."

With the global industry actively reframing wool's sustainability credentials and European buyers increasingly prioritising supply chain transparency, Turkish manufacturers have a compelling story to tell. The question is whether they can scale that narrative fast enough, and with sufficient investment in technology and brand, to compete in a market where Italy still casts a very long shadow.

ADVANCED CARDING SOLUTIONS FOR TURKEY

White Shark / Brujas is a leading supplier of precision carding combs to the textile industry worldwide. It has established a subsidiary company in Turkey called BRUJAS TEKSTIL MAKINA SAN TIC LTD STI. This company serves as a sales, technical support and after-sales service centre for White Shark and Brujas card clothing products in Turkey. It maintains local inventories of card clothing and mounting equipment and employs a local sales and service team to provide rapid customer support.



Tanrikulu Mustafa

Mr Tanrikulu Mustafa general manager of sales, says, 'The company has built a strong reputation in technical comb manufacturing for the cotton sector in Turkey and has now expanded to supply combs to manufacturers that work with wool and speciality fibres. This reflects the increased demand from textile manufacturers in Turkey that supply European, and particularly Italian and German brands where high levels of card clothing precision and technical service are essential.

'Rather than supplying just standard components, White Shark / Brujas works directly with customers in Turkey to develop customised comb solutions suited to specific fibre types, machinery configurations, and production requirements. This approach helps mills improve fibre control, reduce damage and enhance product consistency,' he says.

REACH CHINA'S WOOL INDUSTRY IN ITS OWN LANGUAGE

wool2yarn china is a cost-effective advertising platform giving textile companies around the world the opportunity to reach wool and speciality fibre buyers in China—in their own language.



Published annually in September, *wool2yarn china* is a buyers' guide for the Chinese textile industry for the year ahead. The magazine is circulated in China by Nanjing Wool Market.

wool2yarn china is circulated to major companies and organisations across China, including importers of wool and speciality fibres, wool processors and topmakers, spinners and weavers, carpet and garment manufacturers, yarn and fabric producers, rug and carpet manufacturers, and government agencies and ministries.

In addition it is distributed to all delegates attending the annual Nanjing Wool Market Conference, the leading conference for China's wool and early wool-processing industry.

"For companies seeking new customers, advertising in *wool2yarn china* puts their company and products directly in front of targeted decision-makers across China's wool industry," says Victor Chesky, Editor of *wool2yarn* magazines.

"For companies with established customers in China, advertising provides valuable reinforcement of their position as a preferred supplier."

For advertising opportunities in the 2027 issue of *wool2yarn china*, contact Victor Chesky at victorch@bigpond.com or visit www.wool2yarnchina.com.

WHERE METALLURGY MEETS CRAFTSMANSHIP

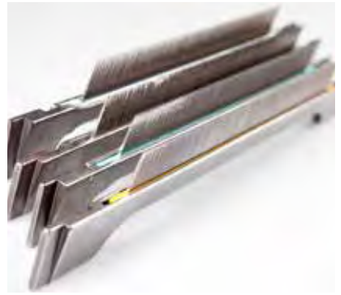
Preserving one of Europe's most specialised manufacturing skills for the wool textile industry

Some of the most important components in a gilling machine are also among the least visible. Steel combs may appear to be simple wear parts, yet their precision, hardness and durability have a direct influence on fibre control, sliver regularity, production efficiency and yarn quality.

For more than fifty years, Coppa has dedicated itself exclusively to mastering this specialised technology. Based in Biella, Italy—the historic heart of the European wool industry—the company has become one of the very few manufacturers in Europe still producing precision steel combs entirely in-house for the world's leading wool textile machinery.

Rather than diversifying into multiple product lines, Coppa has chosen to concentrate all of its resources on a single mission: designing and manufacturing the highest-quality combs for wool preparation machinery. This focused approach has enabled the company to develop a level of expertise that is difficult to replicate.

Coppa's relationship with the textile machinery industry extends far beyond supplying replacement parts. For decades, the company has worked alongside the engineering departments of



leading machinery manufacturers, including NSC, Sant'Andrea, OKK and Cognetex, contributing to the development and optimisation of comb designs specifically engineered for each machine. This close technical cooperation has resulted in products that combine perfect compatibility with long service life and reliable performance.

The manufacturing process begins with a specially developed cold-drawn alloy steel profile produced by one of Italy's leading specialist steel manufacturers. The chemical composition of the material has been carefully selected to achieve an ideal balance between wear resistance and toughness. Following a sequence of heat treatment operations—including hardening and tempering—the combs develop a hard, wear-resistant surface while retaining a resilient core capable of withstanding millions of operating cycles without becoming brittle.

Although modern machinery ensures precision during the initial machining stages, the true value of a Coppa comb lies in the craftsmanship that follows. Straightening, heat treatment, stress relieving, surface finishing, vibratory polishing, precision slot milling and final assembly all rely on the experience of highly skilled technicians who have refined these processes over decades.

The heat treatment process, in particular, remains one of Coppa's greatest strengths. Furnace parameters are manually adjusted for every production batch according to the metallurgical characteristics of the steel. This knowledge cannot simply be programmed into a machine—it has been accumulated over generations and carefully passed from experienced operators to the next, ensuring that every comb consistently achieves the precise combination of hardness, flexibility and durability required for demanding textile applications.

The pins themselves are sourced from Germany's leading specialist manufacturers, while every subsequent manufacturing and assembly operation is carried out entirely within Coppa's own facilities. The pins are accurately positioned and permanently secured using carefully selected resin or tin-sealing technologies, depending on the specific machine application and customer requirements.

Press-in pins strap can also be fitted by using our insert machine press (see picture).

Today, manufacturers around the world face increasing competition from lower-cost alternatives. While these products may appear similar, differences in metallurgy, manufacturing precision and process control often become evident only after extended operation. For Coppa, long service life, dimensional stability and consistent performance remain the true measures of quality. Lower maintenance requirements, fewer machine stoppages and



reliable fibre control ultimately provide greater value than purchase price alone.

Although Coppa employs just eleven highly specialised people, every comb leaving the workshop embodies more than half a century of accumulated manufacturing knowledge. It represents the combination of advanced metallurgy, precision engineering and traditional craftsmanship that continues to distinguish Italian manufacturing throughout the world.

As European production of specialised textile machinery components has progressively declined, Coppa continues to preserve a unique manufacturing expertise that has become increasingly rare. For customers processing high-value fibres such as wool and cashmere, this commitment provides something that cannot easily be copied: confidence that one of the most critical wear components in the production process has been engineered to perform reliably, consistently and for the long term.



BANGLADESH

by Mainbayar Badarch

THE NEXT FRONTIER OF WOOLEN SWEATER MANUFACTURING

Historically, Bangladesh has been known for its cotton-based knitwear and woven garments, and today, knitwear contributes nearly 47% of the country's total Ready-Made Garment (RMG) export earnings. The sweater export sector, including woolen garments, is a significant part of that, with a sales value of US$6–8 billion. Despite this growth in general knitwear, the wool-specific segment is still relatively small. The current annual export value for woolen garments is around US$100 million, but this is expected to grow rapidly.

Global demand for woolen garments is expanding because of the diversity of wool yarns—pure wool, blends, and sustainable fibers. Wool is considered a premium fiber, allowing Bangladeshi manufacturers to upgrade the value chain by producing high-value suits, sweaters, and knitwear for global brands. Bangladesh is aiming to reach a US$1 billion woolen garment export target by 2030, with potential partnerships with Australia.



Technological advancements in spinning and fiber engineering now allow local manufacturers to efficiently process wool blends using existing machinery while maintaining quality and commercial viability. 'Bangladesh's knitwear industry should now move beyond cotton-based products and explore premium and differentiated segments such as wool and wool-rich garments,' said Mohammad Hatem, President of the Bangladesh Knitwear Manufacturers and Exporters Association.

While much of the wool, yarn, and fabric are currently imported from countries like China, Italy, and England, efforts are underway to strengthen local capacity for blended yarn production, combining wool with cotton, viscose, or acrylic to reduce dependence and shorten lead times. According to the Observatory of Economic Complexity (OEC), in 2024, Bangladesh imported US$89.3 million of wool and animal hair, becoming the 24th largest importer of wool and animal hair (out of 191) in the world.

India-based 'Export Genius' online data platform reports that Bangladesh recorded 941 import shipments of wool and wool yarn between December 2024 and November 2025. During this period, 177 active companies in Bangladesh traded with 239 overseas partners, making wool and wool yarn one of the most actively traded products in the country's import market.

According to the Export Promotion Bureau of Bangladesh, Bangladesh exported US$38.8 billion worth of ready-made garments to the global market last year, losing its second place to Vietnam (US$39.6 billion). This indicates weakening knitwear performance, signaling saturation in low-cost product categories. Most of the large garment exporters, such as Dragon Group, Knit Asia Limited, Labib Group, NR Group, TK Group, Hannan Group, and Siatex (BD) Limited, are now doing wool related businesses. It is estimated that a total of 100-150 garments companies manufacture woolen clothes.

Dragon Group

Mostafa Sobhan, Honorary Consul of Uruguay & CEO of Dragon Group Bangladesh, told *wool2yarn*: 'We have worked with various blended yarns and wool-mixed products depending on international buyer demand and seasonal trends. In the past, we imported wool and wool-related raw materials, including from Uruguay, and developed wool-blended sweaters for export markets. Strategic engagement with Uruguayan wool exporters has allowed us to explore raw material sourcing, knowledge exchange, and potential investments. We import wool from Uruguay at US$5 per kg. Most wool products manufactured in Bangladesh are blended garments rather than 100% wool products, generally

ranging between 10% to 40% wool content depending on customer requirements.

'We are also advocating for building local yarn and fabric-making capacity for wool to reduce import dependence, improve lead times, and make Bangladeshi woolen garments more competitive internationally. There is increased focus on blended yarns, such as wool combined with acrylic or viscose, which lower costs, maintain quality, and attract international buyers seeking premium but cost-effective knitwear,' highlighted Mostafa Sobhan.

Dragon Group is also acting as an agent and business representative in Bangladesh for Uruguayan wool supplier Lanas Trinidad. Through this cooperation, wool is being supplied regularly to Bangladeshi wool spinning mills and manufacturers. Currently, approximately 2-3 containers of wool are supplied per month to Bangladesh through this channel, supporting the growing demand for wool-blended yarns and garments in the local textile sector.

According to Mostafa Sobhan Dragon Group continues to explore opportunities in wool-blended and recycled wool products for future expansion. They are also studying the possibilities of developing higher-value sustainable yarns and knitwear using international raw materials together with Bangladesh's strong garment manufacturing base.

As an Honorary Consul of Uruguay, Mostafa Sobhan hopes to organize a business delegation visit from Bangladesh to Uruguay in the future, involving business leaders, economists, and media representatives, to further strengthen bilateral commercial relations. The Bangladesh Garment Manufacturers and Exporters Association noted: 'Bangladesh imports wool from Uruguay as raw material and, in return, secures special trade preferences for exporting ready-made garments under an FTA; the country's apparel sector would benefit significantly.'

Knit Asia Limited

Knit Asia is Bangladesh's second largest apparel exporter. In an interview with *wool2yarn*, Amer Salim, Director of Knit Asia Limited and Aurum Sweater Limited, said: 'Decathlon requested we produce a few samples for hunters' sweaters with 100% merino wool content in 2019. So, it was the start of our journey to produce sweaters with 100% wool. We made a brave move back then, and now we are used to making wool sweaters with ease. We supply the hunters' sweater at FOB US$40, so it's a high-value product compared with cotton sweaters, where the average FOB is at US$6 to US$7.

'We also export wool mixed garments to GUESS and to other customers in Europe, the UK, and the USA. We source merino wool from Jayashree Textiles in Kolkata and have two other wool suppliers in Punjab, India. Besides that, we also source fancy yarns of wool blends from China. Many of these fancy yarns have a rich wool content. We work with blends — wool-acrylic, wool-cotton, etc. Natural fiber blends like wool-cotton or wool-silk have strong potential. But capacity expansion should be based on global demand and price —, not over-investment. It is important to have a clear understanding of the demand and supply scenario before making an investment,' said Amer Salim.

Aurum Sweater continuously invests in working with delicate and fancy yarns, implementing complex washing and dyeing techniques, and providing extensive embellishments that many in Bangladesh are hesitant to attempt. Currently, Aurum Sweater has 400 regular knitting machines in the existing plant and 400 whole garment knitting machines in their new plant. They plan to install a total of 1,000 knitting machines in the new plant that will give them a total strength of 1,400 knitting machines altogether. They source machines from China and Japan. All their Japanese knitting machines are from Shima Seiki.

'Ningbo in China is a good hub to purchase knitting machines and related equipment. We attend exhibitions regularly to study new machines and technologies to enhance capacity and the recent attendance was ITMA Asia 2025, held in Singapore in late 2025. We look at technology investment from three main angles —: payback, sustainability, and efficiency. Earlier, the gap between machine cost and labor cost was wide, but now labor has become more expensive. So, technologically advanced machinery often pays back faster,' Amer Salim added.



Mostafa Sobhan

Siatex (BD) Limited

Pranub Dutta, Managing Director at SIATEX (BD) Ltd told *wool2yarn*: 'We are an OEM/private label apparel manufacturer based in Bangladesh, producing garments according to each client's custom designs, fabric preferences, and technical specifications. We do not hold any ready-made stock or catalog, as all items are made to order. While our main expertise lies in cotton, polyester, and blended fabrics, we can also produce wool or wool-blended garments depending on fabric availability and order volume.

'Our MOQ for standard fabrics starts at 2,000 pcs per style/color/fabric (5,000 pcs total per order). For sustainable or special fabrics, such as wool, velour, modal, bamboo viscose, or organic cotton, MOQ is 15,000–20,000 pieces per fabric type with a total minimum of 20,000 pieces per order,' Pranub Dutta explained.

Challenges and Outlook

Raw material dependency remains a challenge since there is very limited domestic wool production. Another key issue in Bangladesh's supply chain is that it's still geared toward final garment assembly, but more manufacturers are expanding to fabric and yarn production so that fabrics do not have to be imported. Diversifying sources and increasing local blending capacity is a key strategy. Long lead times due to imported wool yarn/fabric are being addressed by building backward linkages.

The cost structure of specialty yarns is relatively high, but optimizing blended yarns helps make the economics work. Additionally, global perception of Bangladesh as a high-quality wool garment source is still developing, and strategic partnerships and quality improvements are helping to change that perception.

Stakeholders caution that investment in modern warehousing and technical expertise will be essential, as wool requires specialized storage and handling to protect it from moisture, pests and quality degradation. Also, industry insiders emphasize that Bangladesh manufacturers must also think about accepting smaller-quantity orders. If they can do that, there is a lot of potential.

If the US$1 billion wool export target by 2030 is achieved, it will significantly diversify Bangladesh's export portfolio away from mass-market cotton knitwear and woven garments. Wool garments offer higher per-unit value, improving profitability and brand positioning. Expanding wool production will support upskilling in spinning, knitting, sourcing, and quality control while encouraging foreign investment and long-term industrial upgrading. Sustainability advantages further strengthen Bangladesh's position in the global market.

In summary, there is a clear and ambitious drive to transform Bangladesh into a serious competitor in high-end woolen garments. The combination of global demand, strategic sourcing, blending innovations, and strong export ambitions positions Bangladesh well to capture a larger share of the wool garment market while upgrading its value chain and industrial capabilities.



Amer Salim

by Raghavendra Verma, In New Delhi

IMPORTED WOOL UNDERPINS INDIA'S MANUFACTURING GROWTH

India's expanding textile industry, driven by rising domestic consumption and growing international demand for finished products, is reinforcing the country's position as the world's second-largest importer of wool, after China. Exports are expected to increase further following recent trade agreements, including the proposed deal with the European Union (EU).



India's established industrial base, combined with its strong tradition of textile manufacturing and handicraft skills, continues to make Indian products highly attractive in Western markets. At the same time, the limited availability of high-quality domestic wool means manufacturers increasingly rely on imported fibre to meet production requirements.

In the financial year ending March 2026, India imported raw wool and wool tops worth USD258.04 million, an increase of 15.8% over the previous year, according to data from the Wool and Woollens Export Promotion Council (WWEPC). Import volumes reached 109,961 tonnes, up 2.8% year-on-year.

These imports comprised 15,315 tonnes of shorn wool (greasy, including fleece-washed) valued at USD109.76 million; 16,240 tonnes of other wool (greasy, including fleece-washed) worth USD15.29 million; 10,564 tonnes of degreased shorn wool valued at USD32.34 million; and 2,527 tonnes of wool tops worth USD24.79 million.

By comparison, in 2024/25 India imported 14,111 tonnes of shorn wool valued at USD91.93 million; 20,691 tonnes of other wool worth USD22.05 million; 9,941 tonnes of degreased wool valued at USD27.6 million; and 1,421 tonnes of wool tops worth USD14.23 million.

"The Indian wool industry continues to rely heavily on imported raw wool due to the limited availability of quality domestic fibre," WWEPC chairman Ravinder Chand Khanna told *wool2yarn*. "India produces only around 33,600 tonnes of mainly carpet-grade raw wool annually, while manufacturers of premium woollen yarns and fabrics largely depend on imports from Australia."

"We primarily source Australian Merino wool for its superior fibre quality, excellent colour consistency and reliable processing performance," said Manoj Marda, Senior Vice President – Procurement at Grasim Industries, Kolkata, a subsidiary of the Aditya Birla Group. "These fibre characteristics are carefully matched to the intended end use."

Australia remained India's largest supplier of raw wool in 2025/26, exporting 10,545 tonnes valued at USD97.75 million. New Zealand was the second-largest supplier, shipping 15,898 tonnes worth USD47.02 million, predominantly for use in carpet manufacturing.

"Many Indian manufacturers actively promote the origin and quality of wool as part of their branding, storytelling and product development strategy," Yogesh Chaudhary, managing director of Jaipur Rugs in Jaipur, told *wool2yarn*. "It helps create differentiation in the premium segment and adds greater value to handmade carpets and textiles."

This focus on fibre provenance is particularly significant given that India-made woollen products are exported to more than 150 countries, according to the Wool and Woollens Export Promotion Council (WWEPC). In the financial year ending March 2026, India exported woollen products worth USD1.335 billion. Although this represented a 4.1% decline in value from the previous year, the sector remains an important contributor to export earnings.

The recently concluded Free Trade Agreement (FTA) between India and the UK, which came into effect in July 2026, together with the proposed FTA with the European Union, is expected to provide a significant boost to India's woollen exports.

"Reduced import duties and improved market access will enhance the



Yogesh Chaudhary,
Jaipur Rugs Ltd



Radhe Rathi,
Kaleen Rugs in Jaipur



Ravinder Chand Khanna, Wool and Woollens Export Promotion Council

competitiveness of Indian woollen products, creating new opportunities for exporters and strengthening India's position in global markets," said Mr Khanna.

The EU-India FTA is expected to remove the current 9.6% customs duty on Indian textile products, improving India's competitiveness against suppliers from China, Bangladesh and Vietnam. According to Indian foreign ministry officials, the agreement is expected to come into force by the end of 2026.

With growing global demand for environmentally responsible products, wool is increasingly being marketed as a natural, biodegradable, breathable and premium fibre, Sanjay Khajuria, former chairman at WWEPC, said. "The focus is increasingly on premium, sustainable and niche-value products rather than low-cost mass production."

"International brands are increasingly seeking certified and traceable wool, with Responsible Wool Standard-certified products seeing strong demand across major export markets," added Mr Marda.

Meanwhile, demand for wool-based suiting fabrics in Europe has weakened as formal workplace and social dress codes give way to more casual clothing, such as cotton trousers, jeans and shirts, according to Harish K Chatterjee, director general of the Wool Research Association in Thane, Maharashtra.

"In India, many IT companies allow employees to attend work in shorts and T-shirts, although formal attire is gradua lly returning to Indian fashion," he told *wool2yarn*.

At the same time, the move away from formal tailoring towards casual, comfortable and versatile clothing has created strong growth opportunities for machine-washable wool knitwear and performance-oriented wool products, said Mr Marda.

"Looking ahead, the export market is expected to be shaped by comfort, sustainability and value for money," he said.

Woollen product category	Export value 2025/26 (USD million)	Change from 2024/25
Woollen yarn	107.69	+10.2%
Woollen fabric	30.68	+11.5%
Wool knitted garments	264.81	-11.6%
Woven wool garments	113.11	-2.2%
Wool shawls	73.83	+15.0%
Total	**590.12**	—

Source: Wool and Woollens Export Promotion Council (WWEPC), India.

Main export destinations for India's woollen products are the EU, USA, UK, and Japan

India's Domestic Consumer Market

Exports are not the only driver of imported wool consumption in India. Wool is also widely used in the country's vast domestic market of 1.4 billion people for carpets, home furnishings, suiting fabrics, school uniforms and ethnic wear, said Mr Khanna.

Annual sales of textile products in India are estimated at INR12.02 trillion (USD128 billion), of which wool products account for just 1.3%, placing the value of the domestic wool market at around USD1.66 billion. Over the past 15 years, demand for woollen products has grown at an average annual rate of 7.02%.

While India's growing population continues to underpin demand for wool products, the increasing use of synthetic fibres has affected the consumption of pure wool, said Mr Khanna.

"Escalating raw material costs have made pure wool products considerably more expensive," he said. On Amazon India, for example, Raymond's Merino All Wool Fabric (three metres by 1.5 metres) retails for INR4,499 (USD48).

For woollen fabrics and trousers, southern India is the country's largest market despite its relatively mild winters, according to Mr Chatterjee. "People wear it for comfort," he said.

However, according to Mumbai-based wool agent Bobby Sajdeh, owner of Sajdeh Trade International, most woollen fabric sold in Indian stores today contains around 45% wool and 55% polyester, often with 1% or 2% Lycra added. This marks a significant shift from 20 to 30 years ago, when typical blends contained around 70% wool and 30% polyester.

"The advantages of wool have not really been driven home to Indian consumers," he told *wool2yarn*.

Despite this, Indian textile companies continue to innovate by developing new designs and fibre blends using wool, said Mr Chatterjee.

"Wool is mixed not only with cotton or hemp, but even with banana fibres to achieve different feels and finishes," he said.

Production scale remains a challenge, however, as few companies other than Raymond and Grasim have the capacity to manufacture finished woollen products in significant volumes, according to Mr Chatterjee.

"Major wool processing plants and yarn manufacturers are spread across the country, particularly in Maharashtra, while the majority of medium and small enterprises operate in Amritsar, Ludhiana and Panipat," said Mr Khanna.

Ajay Pradhan, Country Manager, India for Australia's The Woolmark Company, said "India has become one of the most important growth markets for Australian Merino wool, with Australia supplying the largest share by value."

"What is particularly exciting is how the market is evolving. Merino is no longer confined to knitwear or winter apparel, with growing use in sportswear, denim, shirting, polos and contemporary casualwear. Advances in lightweight fabrics and processing technologies are creating products better suited to India's climate and changing consumer preferences."

"At the consumer end, demand is shifting towards premium, long-lasting, natural fibres that offer comfort, performance and environmental credentials."

"For the Australian wool industry, the opportunity extends well beyond supplying fibre. India is emerging as one of the world's most important value-adding markets for Australian Merino wool."

Indian Carpets Depend on New Zealand Wool

India's carpet industry is concentrated in several specialist centres, with the desert city of Bikaner in Rajasthan playing a particularly important role because of its large concentration of yarn spinning units.

According to Devashish Bihani, director of Dev Woollen Mills in Ludhiana, Punjab, around 70% of the yarn used in Indian carpets is produced in Bikaner, while the largest consumption centre is Bhadohi in Uttar Pradesh.

The Mirzapur-Bhadohi region is the country's largest handmade carpet weaving cluster.

According to the Bhadohi district administration, the region has been renowned for hand-knotted carpets since the 16th century and today provides employment for around 2.2 million rural artisans. In 2010, the carpet-producing region encompassing nine districts of eastern Uttar Pradesh, including Bhadohi and Varanasi, received the Geographical Indication (GI) tag for the 'Handmade Carpet of Bhadohi.'

India exported woollen carpets worth USD711.9 million last year, down 5.5% from the previous year, according to the Wool and Woollens Export Promotion Council (WWEPC). Exports of knotted carpets and other textile floor coverings made from wool or fine animal hair totalled USD203.71 million, compared with USD231.26 million a year earlier, according to figures shared with *wool2yarn* by India's Ministry of Commerce.

Imported New Zealand wool plays a critical role in helping Indian manufacturers meet international quality standards, particularly in premium handmade carpets destined for export markets, said Mr Chaudhary, managing director of Jaipur Rugs in Jaipur.

"With extensive expertise across spinning, weaving, dyeing, finishing and handcrafted carpet production, manufacturers efficiently convert imported raw wool into high-value finished products," he said.

The combination of traditional craftsmanship and industrial-scale manufacturing enables Indian exporters to serve both luxury and large-volume commercial markets.

"Today, customers are not just buying a product — they are investing in authenticity, artisanal heritage and conscious luxury," Mr Chaudhary said.

The United States remained the largest market for Indian knotted wool carpets in the financial year ending March 2026, importing products worth USD144.68 million, according to India's Ministry of Commerce. Australia and Germany were distant second and third largest markets with imports valued at USD9.48 million and USD6.26 million respectively.

The origin of the wool has become an increasingly important quality and branding differentiator for Indian manufacturers, according to Mr Khajuria.

"While Australian Merino wool is highlighted for premium apparel, New Zealand wool is extensively used in carpets because of its resilience and dyeing properties," he said.

Carpet wool requires long fibres, good staple strength and lustre, characteristics commonly associated with New Zealand wool, according to Mr Bihani, whose spinning operation employs 90 people. But, "good and cheaper carpet wool also comes from Syria and Saudi Arabia," he told *wool2yarn*. "Alpaca from Peru and mohair from South Africa, costing around USD30 per kilogram, are used in our more expensive carpet yarns."

Not all manufacturers share the same view on fibre performance, however. According to Radhe Rathi, director of Kaleen Rugs in Jaipur, New Zealand wool can lack resilience in some applications. "When you walk on it, it tends to become flat," he told *wool2yarn*. "The coarser wools from the Mediterranean and Persian Gulf regions have higher resilience, allowing them to spring back more effectively."

Mr Rathi said some of the yarn used by Kaleen Rugs at its Panipat, Haryana, manufacturing facility is produced in-house, although most is sourced from Bikaner.

Wool prices have become a major concern for carpet manufacturers. According to Mr Bihani, prices have almost doubled over the past seven to eight months.

"New Zealand wool that was arriving at USD2.50 per kilogram is now USD5 per kilogram," he said.

Carpet prices, however, have not increased at the same pace, while consumers are replacing carpets less frequently than in the past, adding further pressure on margins.

At Ganga Acrowools in Ludhiana, Punjab, which produces yarns for hobby knitting and carpets mainly for export markets, product development is undertaken both in-house and in collaboration with customers, according to company president Amit Thapar.

"The most common blends are wool and synthetics," he told *wool2yarn*. "Currently consumers prefer natural fibres over synthetics."

The industry's product range has also expanded considerably over the past decade.

"Ten years ago only three or four types of woollen carpets and a handful of carpet yarns were produced in India," Mr Bihani said. "Today, much more expensive yarns are being used in carpets."

He said his company's yarn range now sells for between INR150 (USD1.60) and INR4,000 (USD43) per kilogram.

Mr Bihani believes the flexibility offered by hand-crafted production gives Indian carpets a unique advantage over machine-made alternatives.

"With machines you usually get one pattern, whereas with handlooms you can change patterns every five centimetres or so," he said.

Indian carpet manufacturers are also investing in new machinery and employing increasingly sophisticated designers. "The future of India's carpet sector is good," Mr Bihani said.

Navigating Geopolitical Disruptions

Recent conflict in the Middle East has created challenges for India's wool processing and manufacturing industry. According to Mr Marda, longer transit times have affected inventory planning and increased working capital requirements. "While demand fundamentals remain intact, exporters are closely monitoring developments and maintaining supply chain flexibility to minimise disruptions," he said.

Mr Khanna said the Indian wool industry has responded with resilience by rerouting shipments, maintaining buffer inventories and diversifying export markets. Rather than competing solely on cost, Indian manufacturers are increasingly differentiating themselves through technical expertise, flexible manufacturing, sustainability and innovation.

"By 2035, India is expected to play a larger role in supplying premium wool yarns, fabrics and garments to international markets, supported by strong partnerships with Australian wool growers," Mr Marda said.



BRITISH WOOL IN INDIA

For many years, China has dominated the global strong wool trade, but increasingly another market is attracting attention – India.

Anyone who spends time in the country can see the pace of industrial growth. Investment is taking place across the textile sector, and the wool industry is no exception. Processing, spinning and manufacturing capacity continues to expand, creating new opportunities for wool-producing nations around the world.

India already accounts for around a third of New Zealand's wool exports and has become an important destination for wool from Europe and the Middle East. Much of this fibre ultimately finds its way into the country's extensive carpet industry, with processing centred around Bikaner and manufacturing concentrated in Bhadohi, one of the world's largest carpet-producing regions.

For British Wool, India is becoming an increasingly interesting market. That was certainly evident at this year's Bharat Tex exhibition in Delhi. British Wool attended the event to better understand the market and meet with manufacturers and potential customers. What stood out was the level of interest in British wool. Visitors were keen to discuss fibre specifications, traceability and provenance, while many were surprised to learn about the scale of the UK wool clip and the diversity of British wool types available.

There was also a growing recognition that manufacturers are looking to diversify their wool sourcing. While New Zealand remains a major supplier, businesses are increasingly interested in understanding what other origins can offer, particularly as customers place greater importance on sustainability, transparency and responsible sourcing.



British Wool stand at Bharat Tex exhibition in Delhi

The newly implemented UK-India Free Trade Agreement is expected to strengthen commercial links further. British wool is already being spun in India before returning to the UK in finished products, and many within the sector believe trade between the two countries will continue to grow in the years ahead.

India is not a market that will transform overnight, but the direction of travel is clear. As processing capacity expands and international customers look for reliable, traceable wool supplies, India is likely to play an increasingly important role in the global wool industry.

Andrew Hogley, CEO of British Wool, said: "Bharat Tex gave us a valuable opportunity to see first-hand how quickly the Indian wool sector is developing. We had some very positive conversations with manufacturers and processors who were keen to learn more about British wool and what it can offer. India is a market with significant potential and one that we look forward to developing further in the years ahead."

YAK FIBRE

BHUTAN TARGETS GROWTH IN HIGH-VALUE

By Phuntsho Wangdi, In Thimphu

The Bhutanese government is working with international experts to create a quality yak wool export sector, tapping and improving traditional harvesting and processing techniques, honed over centuries in its Himalayan kingdom. Towchu Rabgay, Livestock Research and Extension Division Chief, under Bhutan's Ministry of Agriculture and Livestock, told *wool2yarn* that his department has been introducing wool collection and processing changes under a five-year memorandum of understanding signed with the House of Tengri, a London based social enterprise and luxury design house.

Both parties have been committed to the development of high-quality yak fibre. This agreement includes forming yak herder groups, animal management, conserving genetic resources, while training livestock staff and herders to collect and test yak fibre. The House of Tengri has been providing technical help and advice on wool collection, processing and product diversification, while helping develop strategies for selling yak wool products in international markets. It has also been helping source investment for yak wool development in Bhutan.



> ***"Bhutan has the potential to developing its own brand, just as other countries with yak populations have already done"***
>
> *Dr Seeta Giri, of Mountain Crafts*

"We are still in the research stage," said Touchu Rabgay adding that the government is aiming to create a nationwide yak down collection system, with continuous testing of the fibre and creation of sample premium products such as jackets, scarves and shawls.

According to his estimates, Bhutan's overall collection of yak wool should be around 12 tonnes by 2034, double the estimated

collection today. Of this, premium yak down would weigh around three tonnes, which could be exported to international textile brands and fashion houses.

The initiative is in keeping with the Bhutanese government's objective to make yak wool a high-value product by the end of its current five-year development plan (2024-29). In 2024, experts from Mongolia provided technical and practical aspects in yak wool collection and production to livestock officials and herders, with support from UN Food & Agriculture Organisation (FAO). The support also installed fibre processing equipment in one of the yak herding districts in western Bhutan.

The goal of these initiatives is to enable Bhutan to produce high-quality machine-processed yak fibre for international markets: "Our fibre was tested in Mongolia and is of international standards," says Towchu Rabgay.

Bhutan currently has 29,699 yaks, with potential for growth given improved yak down harvesting methods were only begun in earnest in 2025.

Globally, yak wool is rare and recognised for its comfort, durability, and antimicrobial properties.

"The potential is immense," said Chandrika Tamang, a Bhutanese designer who runs CDK Gyencha, a textile brand. She designed sample luxury scarves with an initial batch of machine-processed yak down in 2025, which had been woven by a women's weaving group.



Chandrika Tamang, founder of CDK Gyencha



Towchu Rabgay, Livestock Research and Extension Division Chief



Manual sorting of raw yak wool at the National Yak Farm, in Haa

"Currently Bhutan's yak wool is not treated with chemicals," said Dr Seeta Giri, of Mountain Crafts, a Bhutan-based social enterprise that engages with the local communities to work with natural fibre, including yak wool. "Bhutan has the potential to developing its own brand just as other countries with yak populations have already done."

Of the 15 million yaks worldwide, 13 million are in China and 1.5 million are in Mongolia. The rest are distributed in India, Nepal and Bhutan.

wool2yarn visited the Dagala rangelands, a summer yak pasture region in western Bhutan in early June. It was the start of the shedding season, 4,500 metres above sea level, and a seven-hour uphill hike from the nearest roadhead, where the Buthri family run their farm.

The Buthri family was running a rake-like comb through the neck hair of a two-year-old yak. Each stroke pulled a fistful of soft blackish hair. The down collected was earmarked for the government yak wool project and was the second season herders in selected locations have collected down for machine processing into high-quality fibre

"We used to hand pluck the shedding hair to weave a 'charkap' [rain cloak] that keeps you dry and warm," Buthri recalled. "But that was a long time ago," says Kado Buthri.

For generations yak herders have made tents, ropes, rugs and sacks from the strong outer guard hair while the slightly coarse intermediate layer and the soft inner down have been used to weave traditional costumes and garments, mixed with sheep wool. In recent years, yak hair has found a new market as souvenirs for tourists. Bhutan's yak wool is soft and breathable, reflecting qualities found in yak wool from other Himalayan regions. Bhutanese output also benefits in quality and marketing terms from connections with Bhutan's ancient highland culture and traditions.

The hope is that in the future Bhutanese yak wool can rival the prices of cordyceps, a highly valued medicinal fungus found in some Bhutanese highlands, collected by the yak herders. Today cordyceps prices range from USD12,000 to USD51,000 a kilogramme, depending on the quality. Despite being strictly regulated, cordyceps collection is not seen as sustainable. Quality yak fibre, on the other hand, could become a sustainable replacement to the fungi collection, according to the government.

Last year's inaugural pilot collection through improved methods produced seven kilogrammes of processed wool from 15.5 kgs of raw wool at a pilot location. This year's collection expanded to four districts from 1 to 3-year-old yaks yielding 126 kilogrammes of raw down. The processed down, ready to be spun into yarn, is expected to be about 70 kilogrammes. The idea is to keep expanding this output.

The government initiative comes at a time when Bhutan's yak population is in decline. One of the main reasons is that younger generations from traditional herding families are leaving for urban areas or moving overseas in search of better economic opportunities.

At the same time, the lucrative trade in wild cordyceps collection is increasing human-wildlife conflict, which can result in yaks being killed by wild dogs, snow leopards and even tigers, and the impact of climate change on alpine grazing pastures are all contributing to falling yak numbers.

"That is why breeding, rangeland development, animal health and nutrition all form part of the initiative to ensure the production of quality fibre," said Towchu Rabgay.

He added that the government is also exploring a range of value-added products that could be produced from coarse yak outer hair, including floor mats, as well as technologies to soften the fibre so it can be used in clothing fabrics and garments.

"Our approach is twofold: we not only want to make yak fibre a high-value product, but also help preserve Bhutan's unique highland traditions," said Towchu Rabgay.

Herders, such as Buthri in the Dagala pastures, are hopeful the initiative takes off in the years to come. "There are no cordyceps in our area and we depend on the yak for everything," Buthri said. "It will ensure yak herding continues as an economically viable way of life."







YOUR CUSTOMERS ARE LOOKING: ARE YOU HERE?

by Victor Chesky

When I meet with companies around the world, I'm often asked whether advertising is really necessary. My answer is always yes — it absolutely is. Staying visible and actively promoting the benefits of your products and services is essential, not just to attract new customers but to remind existing ones why they choose to work with you.

Relying solely on customer loyalty is complacent. Regular communication through marketing and advertising reinforces your value and protects your business from competitors who are also vying for your customers' attention.

Another question I'm frequently asked is whether advertising in printed magazines is still relevant. The answer is again yes. Print magazines have a long shelf life. They're picked up, shared, and referred to again and again. *wool2yarn* magazine provides this kind of enduring exposure, giving buyers the chance to revisit your message multiple times over an extended period.

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