

Uruguayan

WOOL

*A quality product for
conscious consumers.*



Uruguay exports 25,000 tons of wool annually to over 40 countries; Europe is the main destination, with 50% of purchases. The country is also the world's third-largest exporter of wool in its natural state (measured in value) and the first in Latin America. It is also the world's sixth largest exporter of wool top measured in dollars.

Driven by a rich heritage of fertile land, with optimal climatic and environmental conditions, Uruguay has excellent natural attributes for sheep breeding and reproduction. There, flocks roam freely under the open sky throughout the year.

25 thousand

Tons
exported
annually

+40

Countries

50%

exported to
Europe

#1

in **LATIN**
AMERICA for
wool exports

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

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

Uruguayan wool offers excellent quality with attributes that set it apart from the rest of the world's wools and that position the country as a solid partner for the development of the sustainable fashion and design industry, both nationally and internationally.





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

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



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

ONE OF THE FEW
100% natural
FIBERS

Sheep produce new fleece each year, which makes wool a completely **renewable** fiber. Its natural and sustainable production **contributes to carbon sequestration in the environment**. In fact, half of the weight of wool is sequestered carbon¹.

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

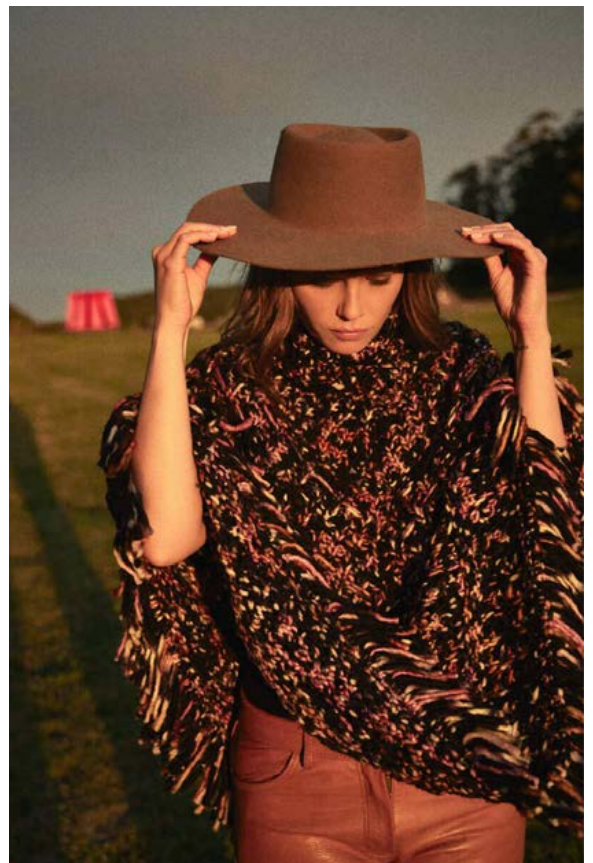
¹ Compiled by Uruguay XXI based on Ovinos SUL magazine, April 2022. "[The sheep industry in Uruguay: Tradition, innovation and opportunities](#)".

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

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



*Rustic wool loom-woven bag
South Wool*



Poncho - Manos del Uruguay

MAIN ATTRIBUTES OF
WOOL IN TEXTILE USE*breathable*

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

*soft on the skin*

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

*insulating*

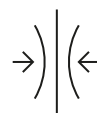
It is an active fiber that reacts to weather to keep the body cool when it is hot and warm when temperatures drop.

*water repellent*

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

*smart crease*

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

*naturally elastic*

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

*odor resistant*

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

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

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

Proof of this is the case of British designer Amy Powney, who in her quest to transform her brand *Mother of Pearl* into a 100% sustainable brand, traveled the world looking for sustainable fibers, that offered high quality and were produced without animal abuse or forced labor. In Uruguay she found the ideal supplier for her collection².

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



Fashion Reimagined - Dir. Becky Hutner

² The designer made a documentary portraying the whole experience.



Collared poncho - Don Baez



Wool blanket - Hilustrada

URUGUAY MERGES
tradition, innovation
AND A SOLID
*institutional
framework*

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

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



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

Uruguay's Guide for the Ethical Production of Sheep is an important step towards the protection of animal welfare in livestock production. **Uruguay is the first country in South America to draft its own guide** based on the compliance of the five freedoms set by the **Farm Animal Welfare Committee (FAWC)**, an independent advisory body established by the UK government in 2011.



Many Uruguayan producers in the sector have the international Responsible Wool Standard (RWS) certification, established by the US conglomerate Textile Exchange. In addition to the requirements set by the FAWC, this certification adds environmental aspects such as the protection of soils, pastures and its biodiversity, and social aspects such as decent labor conditions for workers. Work is being carried out both at the institutional level and in the industry to encourage more producers to join these standards and certifications.

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



Uruguayan shearers are recognized for their talent and methodology, standing out for their speed and precision without harming the sheep and for maximizing the amount of wool they can shear in a day's work. Each year some 300 shearers travel to Europe to perform this seasonal work. **The Uruguayan shearers master the “Tally Hi” method of untethered shearing, which emphasizes animal welfare** and results in a better quality fleece, obtained by an untethered animal, thus avoiding stress and pain for the sheep. **It is important to note that in Uruguay the Mulesing³ technique is not used.**



³Mulesing is a surgery that removes the skin around a lamb's anus, to prevent the attack of a specific fly to that area. The name of this practice derives from the inventor of the technique, John Mules. It is carried out without anesthesia, leaving the animal in intense pain for several days. This technique is not performed in Uruguay because the fly in question is not present in the country. [See link.](#)

Uruguay offers lot-level traceability for sheep production, with means that the wool can be traced back to its origin on a specific property⁴. The traceability system has been required by law since the year 2006⁵ and shows **the country's commitment to transparency in the supply chain, offering reliability and a warranty for external markets.**

Information related to the **harvesting and preparation** of wool at the time of shearing is **digitized** and can be viewed in **real time**, thanks to SIRO, a powerful tool⁶ developed locally to be used by producers, which allows access to information on shearing and preparation of the wool.

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

⁴ For more information on the traceability system in place in Uruguay, visit [this link](#).

⁵ Law 17,997. For more information on the traceability system in place in Uruguay, visit [this link](#).

⁶ Learn more about the tool called [SIRO](#).

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

The partnership was struck between Gucci and Nativa Precious Fiber⁷, part of the French group Chargeurs. Nativa is based in Uruguay and specializes in the supply of sustainable wool and the certification of the production chain for fashion brands committed to reducing their environmental impact. This alliance aims to enable the clothing company to use at least 50 tons of Uruguayan Nativa wool for the manufacture of its luxury garments.

Another key player in this project was the National Institute of Agricultural Research (INIA, for its acronym in Spanish), as it was responsible for carrying out the analysis of the regenerative production, as well as the measurements of biodiversity and soil nutrient levels⁸.

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

⁷ *Nativa Precious Fiber*: Certification from the Chargeurs Luxury Materials conglomerate, covering aspects related to animal welfare, environmental care and corporate social responsibility uses Blockchain for traceability from sheep to finished garments.

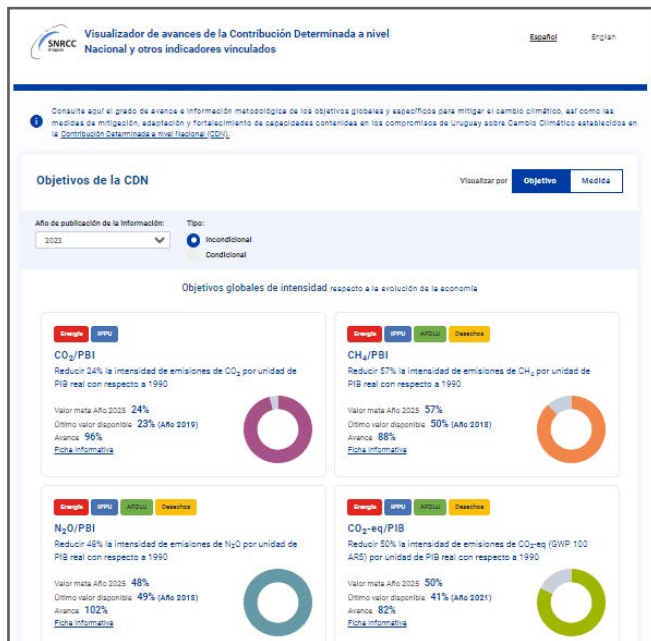
⁸ The Ecosystem Integrity Index is a tool designed for environmental assessment that reveals the conditions of a given property and its evolution over time. This certification follows the global principles of regenerative livestock farming, but is tailor-made for Uruguay because it includes important indicators in the local context as well. To learn more about IIE (for its acronym in Spanish) [click here](#).



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

An agro-intelligent

COUNTRY AT THE FOREFRONT OF
COMMITMENT TO SUSTAINABILITY



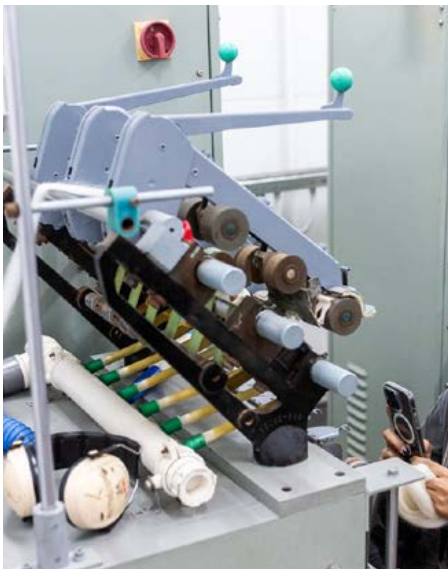
Uruguay shows a strong commitment to environmental sustainability at the international level. In October 2022, the country issued a bond related to environmental indicators such as the reduction of greenhouse gas emissions and the preservation of its native vegetation. This innovative strategy connects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

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

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



Windmills and rainwater reserves - Engraw



WOOL PRODUCTION

sustainable

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

Labor rights

IN URUGUAY

SUSTAINABLE DEVELOPMENT GOALS



Uruguay has the best labor conditions of the region and leads labor formality indexes in Latin America. The goods and services that are offered include an ethical dimension in its processes, that contribute to decent working conditions and access to opportunities. The sheep production chain and the wool sector in particular contribute to the fulfillment of the **Sustainable Development Goals (SDGs)** promoted by the United Nations⁹.

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

⁹ For more information, click on [this link](#).

In turn, Uruguay has targeted programs like Specific Ovine Territorial Interventions, which consist of plans to build producer capacities with an impact on identifying job opportunities, improvements in family income and rural women's empowerment in production processes, among other things¹⁰.

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

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



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



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

¹⁰ For more information, visit [this link](#).



Hand-knitted Merino and Corriedale wool - Ound



100% Wool pants - Ana Livni

URUGUAY AS A
world supplier
OF SUSTAINABLE WOOL



VISIT THE WEB SITE **HERE**

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

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

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

Uruguay is the world's fourth largest exporter of wool top and a large part of these exports are sent to China and the European Union, mainly Germany and Italy. The finest wools are sought by the luxury fashion industry in Italy, while the thicker ones are used by the automotive industry in Germany in order to produce high-end car upholstery and business class airplane seats.

Schoeller Textil AG, a textile manufacturer based in Austria, operates worldwide and specializes in the sustainable development and production of innovative textile technology. The company has been a major customer of Tops Fray Marcos, the country's largest wool washing and combing company, for over 20 years. Annually they purchase around 800 tons per year of Uruguayan wool top.

Its director, Kurt Haselwander, praised the quality of Uruguayan wool as well as its elasticity and softness. He also pointed out that in Uruguay mulesing is not used. With Uruguayan wools, Schoeller manufactures wool yarns used for sweaters, undergarments, vests, and socks as well as premium cars seats and business class seats in airplanes because this wool is resistant to friction. In addition, Uruguayan wool is transformed into the carpets and textiles that equip mainly high-end cars of the BMW and Mercedes-Benz companies¹¹.



100% Merino Sheep Wool - Organic Cotton

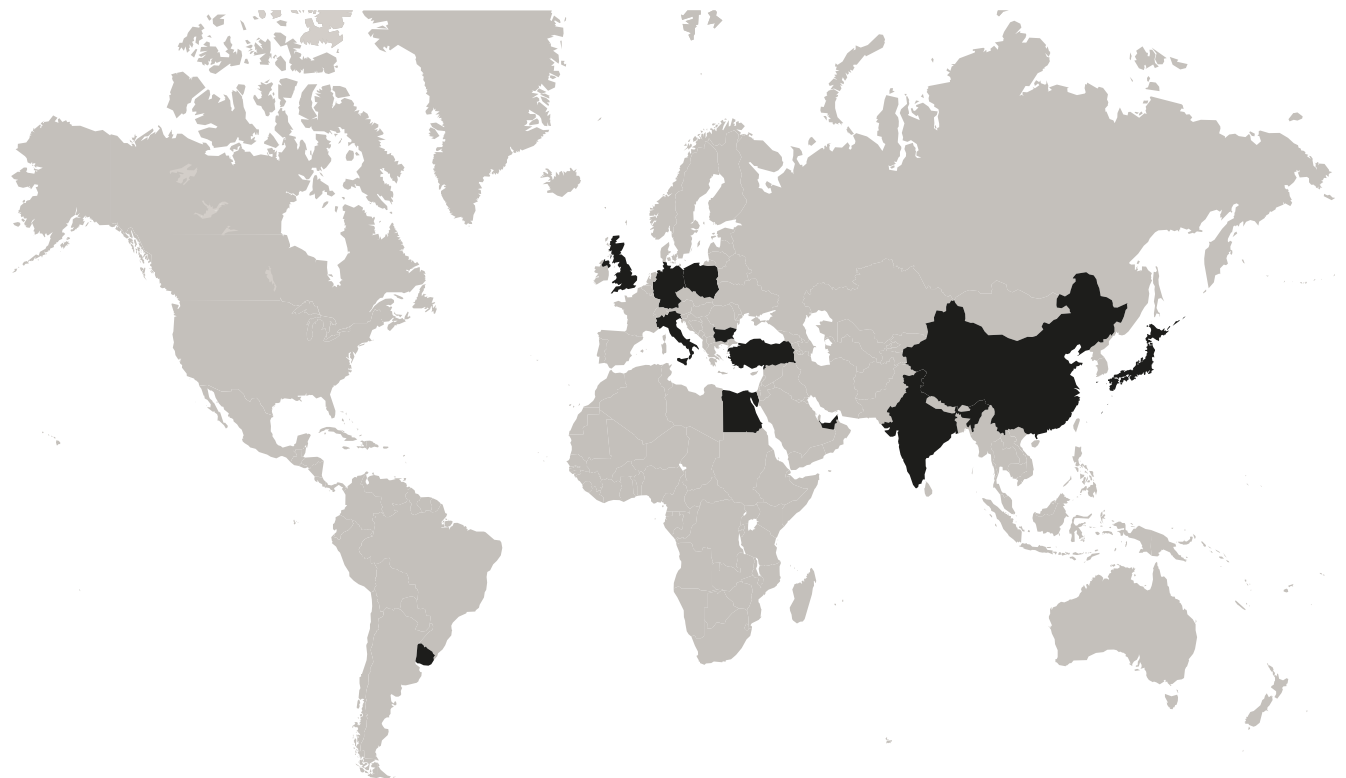


¹¹ See note [here](#).

Annually, Uruguay exports around 25,000 tons of wool to over 40 countries, with Europe as the main destination, as it purchases 50% of Uruguayan production. Within **Europe, Germany, Italy, Turkey, Bulgaria, Poland and the United Kingdom** stand out.

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

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



WOOL MICRONAGE AND THEIR EXPORTS AND USES

TYPE OF WOOL	SUPER FINE AND FINE	INTERMEDIATE	THICK
SHARE (%) EXPORT	40%	50%	10%
MAIN USES	high-end fashion	sweaters, overcoats and garments in general.	rugs and automobile and aircraft interiors
MAIN MARKETS	<p>70% European Union</p> <p>10% South America</p> <p>6% Mexico</p> <p>14% Others</p>	<p>66% European Union</p> <p>12% Turkey</p> <p>4% Mexico</p> <p>18% Others</p>	<p>33% European Union</p> <p>24% United Arab Emirates</p> <p>18% Turkey</p> <p>25% Others</p>

SOME
uruguayan brands

ANK
LIVNI

CARDAN CABOS

Don  Baez
BY MONTELAN EST. 1959

Hilustrada

 La PASIONARIA
universo creativo

malabrigo

 MANOS
DEL URUGUAY
EST. 1968

ound

 Ruralanas

SW
handbags

the
ferra

texturable



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

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

AUDIOVISUAL:

▶ [FASHION WEEK VIDEO](#)

▶ [URUGUAY'S FASHION TRIP](#)

EDITORIAL:

[URUGUAY FASHION CATALOGUE](#)

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