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From my desk at the **new wool warehouse**

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URUGUAY: WOOL PRODUCTION DECREASES, WHILE OTHER INDICATORS KEEP RISING

Sheep production in Uruguay continues to show a downward trend, both in the number of animals and in the total volume of wool. However, a significant shift can be seen in the composition of supply: the share of fine and superfine wools is increasing, as is the volume of wool certified under the Responsible Wool Standard (RWS).

Transformation in the productive profile

As in other producing countries, the drop in international prices for medium and coarse wools has discouraged many farmers. Some have reduced their flocks, while others have chosen more profitable alternatives, such as crossbreeding with fine wool breeds or directly shifting to breeds that produce fine and superfine wools. This trend has become particularly evident in the country's main sheep-raising regions.



Cerro del Bombero Farm – Merinos – Paysandú – Uruguay

The price gap is decisive:

while 19-micron wool commands much higher values, 27/28-micron wools are sold at considerably lower prices. With production costs being similar, the economic equation clearly favours those producing fine wools.

The role of RWS certification

International demand for wools certified under the RWS standard has grown steadily, driven by consumers who value animal welfare and sustainability practices. Uruguay enjoys natural advantages: the absence of the *Lucilia cuprina* fly removes the need for mulesing, a practice rejected by the market but still used in other countries. Furthermore, the environmental conditions and traditional flock management make it easier to comply with certification protocols.



As a result, the share of wool certified under the RWS standard has risen markedly. According to figures released by Textile Exchange in September 2025, Uruguay ranks second worldwide in the proportion of certified wool, with 43% of total production.

The present and the future focused on quality

Market trends confirm that the future of wool lies in finer micron counts, in shearing quality, and in RWS certification. Uruguayan producers have adapted well: some specialise in fine wool, others in high-quality sheep meat, and many strategically combine both, paying particular attention to keeping wool types separate at shearing time.

Estancias Puppo S.A.

In this context, Estancias Puppo S.A. has established itself as a leader in the export of fine and superfine wools of outstanding quality. For the tenth consecutive year, the company remains the country's largest exporter of fine wools, while also increasing the volume of wool certified under the RWS standard in its shipments.

URUGUAY'S WOOL EXPORTS (2025/26 season – July 2025 to February 2026)

In the first eight months of the current season, Uruguay exported a total of 29.4 million kilos of greasy wool equivalent. Of this volume, 42% was greasy wool, 31.6% combed wool, and 26.4% scoured wool. The country's export profile has shifted: for several years now, the main category has once again been greasy wool, as in the past, but with the important difference that today the wool is harvested and prepared to a much higher standard of quality.

GREASY WOOL

So far in the 2025/26 season, Uruguay has exported a total of 12.4 million kilos of greasy wool equivalent, a volume slightly below that recorded in the same period of the previous season (July 2024 – February 2025).

In value terms, exports reached USD 53.4 million, representing a 36.6% increase compared with the same period of the previous season. The main destinations for greasy wool, expressed as a share of total export value, were: China (93.6%), Italy (5%), Bulgaria (0.5%), Germany (0.5%), and Egypt (0.4%).

SCOURED WOOL

With regard to exports of scoured wool, volumes reached 5.2 million effective kilos.

The main destinations, expressed as a share of total export value in US dollars, were: China (72.6%), India (13.8%), and Egypt (7.3%).

WOOL TOPS

Exports of wool tops, between July 2025 and February 2026, totalled 5.9 million effective kilos.

The main destinations, expressed as a share of total export value in US dollars, were: Italy (30.3%), Germany (22.8%), Turkey (6.1%), and China (4.6%).



Container of premium fine wool RWS from Estancias Puppo

