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

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OBJECTIVE MEASUREMENTS OF URUGUAYAN CONDITIONED WOOL

Fine wools with objective data available from farm level.

The Uruguayan Wool Secretariat (SUL) has recently published a technical report presenting the results of key characteristics observed in wool lots produced in Uruguay during the 2024 shearing season. The study focuses on two core parameters: average fiber diameter and scoured yield, both determined through tests conducted at the SUL Laboratory and analyzed by LATU under the IWTO-12 Core Test protocol.

It is worth noting that the scoured yield is calculated as the percentage of clean wool relative to the greasy sample, adjusted to a standard moisture content of 17%.

These results do not represent the national average for the clip, but rather reflect only those wool lots that were laboratory-tested.

As with the conditioning process, the majority of the tested lots consisted of fine wools, for which objective measurements are essential to determine the characteristics that directly affect commercial value.



Key findings include the following:

- **Merino wool:** 59.7% of the total analyzed, with an average fiber diameter of 18.9 microns and a scoured yield of 78.2%.
- **Polwarth wool:** 10.4% of the total, with 22.2 microns and a yield of 81.3%.
- **Dohne Merino wool:** 8.3% of the total, with 21.3 microns and a yield of 78.1%.

Overall, more than 78% of the wool analyzed falls within the fine wool category, confirming Uruguay's ongoing shift towards finer production, while maintaining high standards in fiber quality, harvesting and conditioning practices.

Unlike other producing countries, Uruguayan wool is mulesing-free, as this procedure is not applied due to the absence of the fly responsible for that specific health issue in sheep.

Another noteworthy aspect is the steady growth in the volume of wool produced under the Responsible Wool Standard (RWS). This certification ensures not only animal welfare — including



adequate access to food, water, shelter and veterinary care — but also the adoption of farming practices that protect soil health, biodiversity and water resources, promoting a balance between productivity and environmental sustainability.

Estancias Puppo S.A. remains Uruguay's leading exporter of fine wool, specializing in the marketing of Green Label (Grifa Verde) conditioned fine wools, in full compliance with the harvesting and preparation protocols established by the Uruguayan Wool Secretariat (SUL).

With objective measurements available directly from farm level, our company selects wool lots with the most favourable technical characteristics, the vast majority of which are certified under the Responsible Wool Standard (RWS).

Subsequently, the corresponding analyses are carried out through LATU (Uruguay's Technological Laboratory), which certifies the export lots, confirming that sampling, testing methods and calculations are conducted in accordance with current IWTO core testing regulations and accredited by the OUA. This ensures the international validity and reliability of the reported data.

WOOL EXPORTS FROM URUGUAY (2025/26 season – July to October 2025)

During the first four months of the new season, Uruguay exported a total of 14.5 million kilograms of greasy wool equivalent. Of this volume:

- 42.3% corresponded to greasy wool
- 34.6% to wool tops
- 23.1% to scoured wool

GREASY WOOL

Between July and October 2025, Uruguay exported 6.1 million kilograms of greasy wool equivalent, a figure very similar to that recorded during the same period of the previous season.

In terms of value, exports totalled USD 21.8 million, representing a 24.2% increase compared to the four-month period of the previous season.

The main destinations for greasy wool exports (percentage of total FOB value) were: **China**: 95.1%, **Italy**: 3.0%, **Bulgaria**: 1.0% and **Egypt**: 0.9%.

During this period, Estancias Puppo S.A. retained its position as Uruguay's leading exporter of greasy wool in terms of value.

Our company accounted for 47% of the foreign exchange earnings generated by Uruguay's greasy wool exports, achieving a 58% increase in sales measured in US dollars.



SCOURED WOOL

Exports of scoured wool during this period totalled 2.3 million kilograms (greasy wool equivalent).

The main destinations, based on share of total FOB value, were: China (68%), India (15.6%), Italy (4.1%) and Egypt (4%).

WOOL TOPS

Between July and October 2025, exports of wool tops totalled 3.2 million kilograms (net weight), marking a 5.9% increase compared to the same period of the previous season.

The main destinations, based on share of total FOB value, were: Germany (28%), Italy (22.9%), Poland (7.1%), Turkey (6.1%) and China (5.5%).

