

WOOL IMPACT

2025

Impact Report

Wool Impact exists to lift the demand for and value of your strong wool, so you can continue to invest in the sustainability of your land, the welfare of your animals, and the vibrancy of your communities.

This report is a snapshot of the progress made to date for New Zealand wool producers.



Ministry for Primary Industries
Manatū Ahu Matua



Wool for the win

“

Wool is regaining its rightful place as the fibre of the future — natural, renewable, and capable of meeting the changing needs of people and our planet.

”

Andy Caughey, CEO Wool Impact

Wool Impact was established in 2022 to catalyse demand for New Zealand wool and grow value for woolgrowers.

Our market insights give us confidence that there is a valuable future for your wool, and we are pleased to report on the positive progress made over the past three years.

Aotearoa New Zealand is home to over 8,000 wool growers, producing more than two-thirds of the world's quality strong wool - a key ingredient in premium carpets, textiles, insulation, tennis balls, acoustics, and personal care products.

Wool Impact is creating new demand and value for wool growers and for the companies that transform wool into products that enhance our lives.

Investment in market development, brand-grower connectivity,

innovation, validation of benefits, and foundational services for the sector is paying off. Your wool is shifting from a poorly priced commodity toward a valuable material sought after by global brands and specifiers.

This would not have been possible without support from our funding partners; the Government, through MPI's Sustainable Food and Fibre Futures fund, WoolWorks, ANZCO, Silver Fern Farms, AFFCO, Ovation and Alliance who recognised that fundamental change was needed to reverse the decades-long decline of New Zealand's strong wool sector.

This report is an opportunity to present our progress to woolgrowers, provide a view to what's next, recognise the wool businesses catalysing demand and value for wool and the growers that produce this remarkable natural fibre.

20 international brands

more directly connected with the story behind your wool.

Wool Impact is transitioning brand relationships to commercial entities that can transact, offer value chain transparency, brand-grower connectivity and sustainable pricing.

30 domestic brands

innovating with wool.

We support local brands through working groups, workshops, webinars, published resources, visibility at local, national and international events, and parliamentary meetings.

Wool's reach goes far beyond carpets - now in 8 product categories.

Wool Impact has supported the development of the commercial interiors market segment to stimulate new global demand for wool products.

Sustainability & assurance credentials offering new value to brands.

Stronger industry future fit.

Through shearer training, market and price data, showcasing wool at Fieldays, A&P Shows, and rural events, and media we are keeping wool in the spotlight.

>80%

Increase in NZ Strong Wool price since 2022

Aim: \$6 / kg clean by 2027



FUSCA Strong Wool Indicator (www.fusca.co.nz)

Updated weekly after the public wool auction, the Fusca Strong Wool Indicator (SWI) is a single number unit value of a representative clean kg of NZ Strong Wool.

July
2022

\$2.26

December
2025

\$4.16

Farm-gate price for wool has more than doubled since mid-2022*.

Over \$140 million in additional farm revenue per year based on current production volumes.

* based on averaged strong wool prices and yield and estimated supply chain costs.

Our areas of impact

WHO WE ARE:

Wool Impact champions New Zealand strong wool globally. It is the voice for New Zealand strong wool growers, and the entity to go to for information, inspiration and connection relating to New Zealand wool, and supporting its growing demand.

OUR VISION:

Leading brands use innovative wool-based solutions as a sustainable choice for design, creating a thriving future for the strong wool growers of Aotearoa New Zealand.

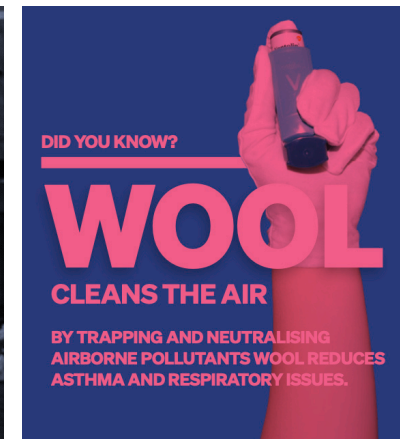
OUR PRIORITIES:

Wool Impact exists to grow the demand and value of strong wool for New Zealand strong wool growers. We bring about this change by delivering three major workstreams. These represent sector gaps which must be addressed to create a strong and vibrant wool sector.

1. Brands as Influencers of Demand

2. Valuing Wool's Natural Status

3. Rejuvenating Our Sector and Reputation



1. Brands as influencers of demand

Consumers can only choose wool if it's visible, available, and backed by the brands they trust. We work directly with brands and specifiers, like architects and designers, who can drive large-scale uptake of wool products.

Our role is to provide them with the insights, connections and tools they need to choose wool confidently, and connect them with transactional partners that can return value to growers.

Work that supports brands:

Direct engagement with over 50 brands and manufacturers - 90% of New Zealand's wool is stronger than 25 micron. 85% is exported to over 30 countries. Building commercial momentum for strong wool and encouraging more direct brand-grower relationships is a key focus.

Gensler collaboration - Partnering with the world's largest architecture and design firm to elevate the visibility of wool, unlock new commercial pathways and connect brands directly with New Zealand growers.

Wool Navigator - A dedicated resource to guide strong wool innovators through the innovation ecosystem, connecting them to technical expertise, funding, and support.

Nonwoven Group - Formed to fast-track collaboration and development of new products in this emerging category.

Growing Brands Cohort - Supports the growth of small and mid-sized brands by tackling shared challenges and building stronger networks.

Nanjing Wool Market Conference - Represented New Zealand wool at the China-NZ Working Group, strengthening international ties and market understanding.

Bharat-Tex India Trade Show - Reinforced New Zealand strong wool's reputation for quality, animal welfare and scarcity alongside New Zealand wool exporters, brokers and brands.

IWTO Congresses in Adelaide and Lille - Led the New Zealand contingents in dedicated strong wool sessions with keynote speakers. Representation in interior textiles and sustainability working groups.

Profile - Building awareness of New Zealand brands using wool through events, PR, and media.



Outcome highlights

Wool is entering new, high growth categories: acoustic solutions (FLOC and Autex), furniture and bedding (Wisewool, Comfi, Kindface, Foxtrot Home), filtration (Lanaco) and personal care products (Woolchemy and Wool Source).

4 in-person workshops facilitated for the nonwoven and growing brands working groups.

12 resources for brands, manufacturers and industry make it easier to use wool - www.woolimpact.com.

4 webinars delivered, upskilling our sector: Carbon Footprint, Wool for the Built Environment, Wool Brand Acceleration, and Planetary Facts.

30+ Domestic brands supported through working groups, webinars, impact information, visibility at local, national and international events.

20+ international brand relationships developed.

3 brands new to wool working on product development.



2. Valuing wool's natural status

We are making it easier for brands and businesses to choose wool by validating wool's credentials. We do this so that these credentials can be built into a value proposition that enhances the likelihood of direct transactions and increased value.

As brands shift focus from reducing harm to regenerating nature, wool is increasingly relevant, offering performance, provenance, and pathways to regeneration that synthetics cannot match.

Work that evidences wool's natural strengths:

Carbon Footprint Research – Commissioned AgResearch to measure the carbon footprint of strong wool, giving the sector credible data.

Wool Brand Acceleration Report – Partnered with The Lever Room to understand what wool businesses globally need and how to better position wool in high-value markets. Insights shared with sector.

Life Cycle Diagnostics – Evaluated the published literature on the life cycle impact of wool carpet tiles relative to nylon tiles.

Planetary Facts for Wool – Expanded the impact perspective, beyond carbon, of wool relative to other materials over different time horizons.

Evidence backed sustainability story for New Zealand wool in development – A reference for brands to extract statements and, evidence, that contributes to global reporting frameworks.

Policy to preference wool in Government buildings – Developed

information packs to support an increase in the specification of wool.

Adoption of New Zealand Farm Assurance Programme in-market – Wool Impact's funding of a collective wool membership to NZFAI, NZFAP programme fees for wool, and a contribution to audit costs has secured wool's inclusion in the NZFAP. NZFAP provides a sector-wide solution for traceability and demonstration of production standards. Wool Impact has been building awareness and global demand for NZFAP certified wool.

“Breathe Easy” factsheet – Commissioned AgResearch to review science supporting wool's indoor health benefits.

IWTO working group research – Supported the publication of research into indoor air quality, sleep quality and the performance of 100 percent wool carpets relative to 80/20 wool/synthetic carpet blends.

FUSCA indicator – Supported the development of the FUSCA strong wool indicator to provide a transparent reference point for price as a way to measure sector progress.



Outcome highlights

Most wool types have reached their highest price levels in eight years.

Over 80% increase in market price of strong wool since 2022 (fusca.com).

This lift has doubled farm-gate revenue and will deliver \$140 million in additional farm revenue per year based on current production volumes (net of costs).

Global brands and manufacturers are looking to Wool Impact to find new ways of securing wool based on specifications, certifications, traceability and the most comprehensive information on understanding the environmental impact of strong wool.

Continued growth will be driven by growing global demand for New Zealand's natural, sustainable strong wool.



3. Rejuvenating our sector and reputation

By restoring capability, strengthening connections, and promoting the value of strong wool, Wool Impact is helping generate demand and improve the profitability of New Zealand strong wool growers.

We're addressing gaps in the foundational aspects of the wool industry providing information, training, cohesion, representation, and voice, to strengthen the resilience and relevance of the industry.

Work to rejuvenate our sector:

Supporting shearers – Co-funded shearer training with the New Zealand Shearing Contractors Association to support beginner and new entrant shearers and wool handlers.

Improved access to wool data – Acting as a central point of data consolidation and interpretation for domestic use of wool, trade, production and price information.

International market insights – Reviewed trade barriers and opportunities, producing a reference guide to help exporters and brands.

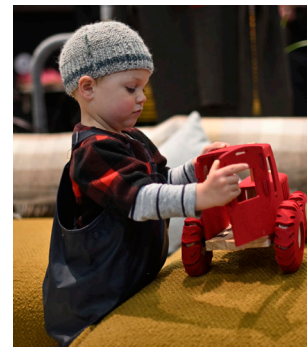
Bringing brands together to celebrate wool's potential – Bringing wool to the forefront at rural A&P Shows, National Fieldays, through speaking engagements at B+L NZ Fieldays, alongside meat sector funding partners, Federated Farmers and Government.

'It's wool' at National Fieldays - Supported by Fieldays and Ministry

for Primary Industries (MPI), Wool Impact's 'it's wool' showcase at Fieldays was a celebration of over 20 innovative domestic brands and people operating across core, adjacent and transformational categories.

Media and sector promotion – Compelling domestic and international initiatives are promoting brand and investment stories across media channels. A regular Wool Impact newsletter keeps interested parties up to date.

Wool Alliance – To amplify the work we have been undertaking, Wool Impact is working as part of the Wool Alliance, a formal agreement between Campaign for Wool NZ, Wool Research Organisation of New Zealand and Beef + Lamb NZ. The Wool Alliance is focused on delivering better long-term outcomes for New Zealand strong wool growers and the industry, generating greater demand, lifting value, avoiding duplication and safeguarding capability. Following consultation with industry partners and growers, testing and refinement, an organisation is expected to be in place by late 2027.



Outcome highlights

Internationally there is now significant awareness of the actions and approach taken by Wool Impact to reposition wool.

Over 15 local, and 5 international keynote speaker engagements.

10 Parliamentary meetings to influence and advance the strong wool agenda.

Collaborations with Campaign for Wool and WRONZ at A&P Shows and National Fieldays.

Collaboration with Ministry of Primary Industry and Fieldays at Mystery Creek Fieldays 2025.

Over 45 earned media stories, across television, radio, online and print.



Ministry for Primary Industries, Fieldays, Wool Impact and the broader wool sector showcase wool innovation at Fieldays' first sector spotlight

Three Years of Action

2022/23

Gensler collaboration established

Navigator role established

Report: Trade policy by Sense Partners published

Resource published: Sources of Government funding

Resource published: Pre-investment questions

Resource published: Where does our wool go?

Government announces policy preference for wool

Nanjing Wool Market Conference: presentation

International market development programme with Godfrey Hirst established

NZ Wool Carbon Footprint undertaken by AgResearch

Review: Life Cycle Impact of wool versus nylon carpet tiles

Webinar: Carbon Footprint with Andre Mazzetto, AgResearch

Factsheet developed: "Breathe Easy" for IWTO

Workshop, Christchurch: NZFAP exporter and broker

Fusca Indicator for monitoring strong wool price launched

NZFAP - Wool Impact was the primary financial contributor to the wool portion of the programme

Benefits analysis of Responsible Wool Sourcing standard

Parliamentary Select Committee: presentation

Federation of Wool Merchants: presentation

Co-funded support of IWTO working groups in partnership with National Council New Zealand Wool Interests (NCNZWI)

Funded business case and development of micro credentials for wool harvesting with Muka Tangata

IWTO roundtable: presented vision for NZ strong wool

IWTO Wool Interiors Working Group member

Fieldays: partnered with MPI to showcase wool innovation

Wānaka A&P Show: profiled wool alongside Silver Fern Farms

New Zealand Shearing Contractors Association AGM: presentation

2023/24

Gensler: phase 1 summary of opportunity

Nonwoven Group: workshop, Christchurch

Growing Brands Group: workshop, Auckland

Resource published: Exporting 101

Resource published: Marketing 101

Review: Ministry for Education wool tender

Nanjing Wool Market Conference: presentation

Factsheet published: Wool's Carbon Footprint

Wool benefits package developed – a compilation of evidenced performance information

NZFAP - Wool Impact was the primary financial contributor to the wool portion of the programme

Parliamentary Select Committee: presentation

Guidance developed: wool pack safety

Co-funded support of IWTO working groups in partnership with NCNZWI

New Zealand Wool Classers Association: presentation

NZ Shearing Contractors Partnership – Wool Harvesting training for over 200 students

IWTO Congress, Adelaide, Australia: NZ strong wool brands profiled in a series of presentations

IWTO Wool Interiors Working Group member

Fieldays: partnered with MPI to showcase wool innovation

B+LNZ Farming for Profit: Glenbrook field day

Wānaka A&P Show: 'it's wool' showcase

Ashburton A&P Show: 'it's wool' showcase

Gisborne A&P Show: participated to showcase wool

Strategic partnership formed with CFW NZ

Wool Reference Group convened

New Zealand Shearing Contractors Association AGM: presentation

2024/25

Gensler New Zealand visit: farm and wool scour visits, brand workshop, industry event

Webinar: Wool's place in the built environment with Rebecca Mills, The Lever Room, and Benjamin Holsinger, Gensler

Nonwoven Group: workshop, Christchurch

Growing Brands Group: workshop, Christchurch

Resource published: Global nonwoven resource overview

Resource published: Wool procurement guidance for brands and specifiers

Online directory launched: Specifier Directory of wool brands and products

Launch of Government procurement policy: alongside Ministers Willis, Peters and Patterson

Bharat-Tex India: NZ Wool collaborative trade stand

Nanjing Wool Market Conference: presentation alongside Minister Patterson

Report published: Wool Brand Acceleration

Webinar: Wool Brand Acceleration, with Rebecca Mills, The Lever Room

New product development with two international brands new to wool

Report published: Planetary Facts for Wool

Product Category Rule for allocation of wool impacts in wool EPDs drafted

Product Category Rule for inclusion of removals in EPDs drafted

Webinar: Planetary Facts with Kate Meyer (Planetary Accounting Network)

New Zealand strong wool sustainability diagnostics analysis undertaken

Report published: the opportunity for valuing on-farm removals

NZFAP for wool – Wool Impact worked with industry to broaden financial contributions to the wool portion of the programme

Co-funded IWTO working groups in partnership NCNZWI

B+LNZ Farming for Profit: Taumaranui field day presentation

IWTO Congress – Lille, France: profiled New Zealand's procurement policy

IWTO Wool Interiors Working Group member

Wool Alliance formalised with CFW NZ, WRONZ and B+LNZ

Wool Reference Group meetings facilitated

Fieldays: 'it's wool' showcase

Federated Farmers' Fieldays Advocacy Hub: Wool Alliance presence

Wānaka A&P Show: 'it's wool' showcase

Silver Fern Farms conference: presentation

ANZCO conference: presentation

Australian Shearing Council Association AGM: presentation

New Zealand Shearing Contractors Association AGM: presentation

Key

- Brands as influencers of demand
- Valuing wool's natural status
- Rejuvenating our sector and reputation

Reasons to believe in a positive and profitable future for wool

New Zealand strong wool is a solution for many societal problems impacting human and environmental health today.

Solid progress is being made toward securing a profitable future for wool, however a consistent effort is required.

Wool Impact's work will continue for up to two additional years, offering a crucial runway to deepen brand engagement, transfer transactional value to commercial entities, and embed knowledge and relationships in a new, enduring, industry organisation.



Reasons to believe in strong wool:

- **Evolving global preferences.** People are questioning plastics and their impact, and there's growing demand for nature positive alternatives.
- **Indoor air and noise pollution is a health risk** and people are paying more attention to the health impacts of the indoor environment we spend most of our time in.
- **Wool's sustainability story is powerful.** It is naturally positioned to be both compelling and credible. New Zealand has two thirds of the world's quality strong wool (100,000 tonne clean).
- **The commercial interiors market segment has been identified as a growth opportunity** as human health, sustainability and circularity are increasingly drivers of specification decisions.
- **New global specifier relationships opening doors.** These relationships are enabling new supply and value conversations.
- **Wool as a disruptor.** Move over plastic materials; particles, pigments and powders, now wool can dominate in acoustic solutions, filtration, feminine care products, dyestuffs, and packaging films.
- **Commercial innovation is already unlocking new, high-value applications** through the likes of Keraplast and WRONZ's investment in Wool Source as a vehicle to sell high-quality wool components.
- **Increased onshore manufacturing** of new value-added products are helping capture greater value in New Zealand.
- **Domestic brands expect their demand for wool to increase from 15,000 tonne to 40,000 tonne** over the next five years through innovative offerings for construction, interior design, government buildings and personal care.
- **New Zealand has world-leading expertise** in sheep genetics, farming systems and wool processing that can be leveraged as the global demand for wool increases.
- **Value based transactional models** that reward growers fairly exist today.

WOOL IMPACT

**We welcome your thoughts and
ideas on growing demand and
value for your wool.**

Please contact Andy:

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