

Wool Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Fine Wool, Medium Wool, Coarse Wool, Others), By Application (Clothing, Carpets, Blankets, Others), By End User (Residential, Commercial), By Region, By Competition, 2019-2029F

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Abstracts

The Global Wool Market was valued at USD 33.86 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 5.3% through 2029. The global wool market plays a pivotal role in the textile industry, serving as a key source of high-quality natural fibers. Wool, obtained from sheep, is known for its unique properties such as warmth, elasticity, and moisture-wicking capabilities. The global wool market encompasses a diverse range of products, including apparel, blankets, carpets, and upholstery. Australia, New Zealand, China, and the United States are significant contributors to the global wool market, with Australia being the largest wool-producing country. The market is influenced by various factors such as climate conditions affecting sheep farming, global demand for woolen products, and economic trends. Additionally, sustainability concerns and the rise of ethical consumerism have led to an increased focus on eco-friendly and responsibly sourced wool, influencing market dynamics and driving innovation in production practices.

Despite facing challenges such as competition from synthetic fibers and fluctuations in demand, the global wool market continues to evolve. Sustainable farming practices, technological advancements in processing and manufacturing, and the development of niche markets for specialty wool products contribute to the resilience and adaptability of the wool industry. As the fashion industry emphasizes sustainability and natural fibers, the global wool market is poised to play a crucial role in meeting consumer preferences

and contributing to a more environmentally conscious textile sector.

Market Drivers

Climate and Environmental Factors

One of the primary drivers of the global wool market is the climate and environmental conditions that directly impact sheep farming. Wool is obtained from the fleece of sheep, and the quality of wool is significantly influenced by factors such as temperature, humidity, and forage availability. Regions with favorable climates, such as Australia and New Zealand, are major contributors to the global wool market. Changes in climate patterns, including extreme weather events and shifts in precipitation, can affect the health and productivity of sheep, thereby influencing the overall supply of wool. Sustainable and responsible farming practices have gained importance as environmental concerns rise, prompting stakeholders to focus on the ecological impact of wool production.

Consumer Preferences and Fashion Trends

Consumer preferences and fashion trends play a crucial role in shaping the demand for woolen products. The global wool market is sensitive to shifts in consumer tastes, with an increasing emphasis on sustainability, natural fibers, and ethical sourcing. As consumers become more environmentally conscious, there is a growing demand for eco-friendly and cruelty-free products, influencing the purchasing decisions in the textile industry. The fashion industry's commitment to sustainability has led to the development of certifications and labeling for ethically produced wool, further impacting consumer choices. The ability of the wool industry to align with and adapt to evolving fashion trends and ethical considerations is a key driver in determining market growth and competitiveness.

Economic Trends and Trade Policies

Economic factors and trade policies have a significant impact on the global wool market. The demand for woolen products is closely tied to the economic well-being of major consumer markets. Global economic downturns can lead to reduced consumer spending on non-essential items, affecting the sales of luxury woolen goods. Additionally, trade policies, tariffs, and international agreements influence the flow of wool and wool products across borders. For example, changes in trade relations between major wool-producing countries and key consumers, as well as trade

agreements affecting the textile industry, can have direct implications on the global wool market. Stakeholders in the wool industry need to monitor and adapt to these economic trends and trade dynamics to navigate the complexities of international markets.

Innovation and Technological Advancements

The wool industry is not immune to the forces of innovation and technological advancements. Developments in farming practices, wool processing, and manufacturing technologies can significantly impact the efficiency and sustainability of the entire wool supply chain. Innovations in sheep breeding, such as the development of breeds with enhanced wool characteristics, contribute to improved yield and quality. Technological advancements in wool processing, including mechanized shearing techniques and more efficient sorting and grading systems, enhance the productivity of wool farms. Moreover, the use of advanced manufacturing processes in the textile industry can lead to the creation of innovative woolen products that cater to changing consumer demands. The adoption of technology in the wool sector is a critical driver that influences productivity, sustainability, and the overall competitiveness of the global wool market.

Regulatory and Certification Frameworks

Regulatory frameworks and certifications play a vital role in shaping the global wool market. Governments and international organizations implement regulations to ensure the welfare of animals, promote sustainable farming practices, and safeguard the interests of consumers. The wool industry is subject to standards related to animal welfare, environmental conservation, and product labeling. Certifications such as the Responsible Wool Standard (RWS) and the Global Organic Textile Standard (GOTS) provide assurance to consumers regarding the ethical and sustainable production of wool. Compliance with these standards can open up access to markets that prioritize socially responsible and environmentally friendly products. The evolving landscape of regulations and certifications in the wool industry influences the practices of producers and processors, affecting the market's overall trajectory.

In conclusion, the global wool market is shaped by a complex interplay of environmental, economic, technological, consumer-driven, and regulatory factors. The ability of stakeholders in the wool industry to understand, adapt to, and leverage these drivers will determine their success in a dynamic and evolving market. As the world continues to grapple with challenges such as climate change and shifting consumer values, the wool industry must remain agile, innovative, and committed to sustainability to secure its place in the global marketplace.

Key Market Challenges

Competition from Synthetic Fibers

One of the primary challenges confronting the global wool market is the intense competition from synthetic fibers. The rise of synthetic alternatives, such as polyester and nylon, poses a significant threat to the market share of natural fibers like wool. Synthetic fibers often offer advantages such as lower production costs, consistent quality, and specific performance characteristics that meet consumer demands. Additionally, advancements in technology have enabled the production of synthetic fibers that closely mimic the qualities of natural wool. As a result, consumers may opt for synthetic alternatives due to affordability and convenience. The wool industry must strategize to differentiate its product and highlight the unique properties of wool, such as breathability, insulation, and sustainability, to maintain its appeal in the face of synthetic competition.

Fluctuations in Demand and Supply

The global wool market is susceptible to fluctuations in both demand and supply. Economic downturns, such as recessions or financial crises, can lead to a decline in consumer spending on luxury items, including woolen products. Consequently, this reduction in demand affects wool prices and the overall profitability of the wool industry. On the supply side, factors like climate variability, diseases affecting sheep, and fluctuations in feed availability impact the production of wool. These supply-side challenges can result in uneven wool supplies, affecting the consistency and reliability of the market. Producers and processors in the wool industry need to implement risk management strategies to mitigate the impact of demand and supply fluctuations, ensuring a more stable and resilient market.

Sustainability Concerns

Growing environmental awareness and concerns about sustainability present a challenge for the global wool market. While wool is a natural and renewable resource, the industry must address issues related to land use, water consumption, and chemical inputs. Sustainable farming practices, including responsible land management and animal welfare, have become focal points for consumers, influencing purchasing decisions. Additionally, the carbon footprint of wool production, including the energy-intensive processes involved in shearing, processing, and transportation, raises

questions about the industry's overall environmental impact. To overcome this challenge, the wool sector needs to embrace sustainable and eco-friendly practices, adhere to certification standards, and transparently communicate its commitment to responsible production to gain consumer trust.

Rising Production Costs

The wool industry grapples with rising production costs, affecting both farmers and processors. Factors contributing to increased costs include higher labor expenses, the need for advanced technologies, and compliance with evolving environmental and animal welfare standards. The labor-intensive nature of shearing, for example, contributes significantly to the overall cost structure. As consumer expectations for ethical and sustainable production practices rise, the industry may incur additional expenses to meet these standards. Balancing the need for profitability with the increasing cost pressures poses a considerable challenge for participants in the wool supply chain. Innovations in technology, such as mechanized shearing techniques and more efficient processing methods, may help mitigate some of these cost challenges, but finding a sustainable balance remains a key concern.

Fashion Industry Dynamics and Fast Fashion

The fashion industry's dynamics, particularly the prevalence of fast fashion, present challenges for the global wool market. Fast fashion involves the rapid production of inexpensive clothing to respond quickly to changing trends, leading to shorter product life cycles and increased waste. The demand for low-cost garments may prioritize synthetic fibers over natural wool, impacting the market share of woolen products. Additionally, the fashion industry's emphasis on rapid turnover can contribute to increased pressure on producers to deliver wool quickly, potentially compromising quality. The global wool market must adapt to the fast-paced nature of the fashion industry, emphasizing the timeless and durable qualities of wool to position itself as a sustainable and high-quality choice for consumers.

In conclusion, the global wool market faces a range of challenges that require strategic responses from industry stakeholders. Overcoming competition from synthetic fibers, managing demand and supply fluctuations, addressing sustainability concerns, grappling with rising production costs, and navigating the dynamics of the fashion industry are critical tasks for the wool sector. Through innovation, sustainable practices, and a proactive approach to market dynamics, the wool industry can not only overcome these challenges but also position itself as a resilient and environmentally conscious

player in the global textile market.

Key Market Trends

Rise in Sustainable and Ethical Practices

In recent years, there has been a noticeable surge in consumer awareness and demand for sustainable and ethically produced goods, including woolen products. This trend reflects a broader shift towards responsible consumerism, where individuals prioritize environmentally friendly and socially conscious choices. In response, the wool industry has seen increased adoption of sustainable farming practices, such as regenerative agriculture and organic wool production. Additionally, certifications like the Responsible Wool Standard (RWS) and the Global Organic Textile Standard (GOTS) have gained prominence, providing consumers with assurance regarding the ethical and sustainable sourcing of wool. This trend is not only driven by consumer preferences but is also influenced by the industry's commitment to reducing its environmental footprint and enhancing animal welfare, contributing to a more transparent and responsible global wool market.

Innovations in Wool Processing and Manufacturing

Recent trends in the global wool market include innovations in wool processing and manufacturing technologies. Advancements in processing methods, such as more efficient sorting and grading systems, have improved the overall quality and consistency of wool products. Technological innovations in manufacturing processes have led to the creation of novel and high-performance woolen textiles. For example, there is an increased focus on developing wool blends with other fibers to enhance properties such as durability, stretch, and moisture-wicking capabilities. These innovations not only cater to changing consumer demands but also contribute to the diversification of woolen products in the market. Stakeholders in the wool industry are leveraging technology to improve efficiency, reduce waste, and create products that meet the evolving needs of consumers.

Consumer Preference for Natural Fibers

A significant recent trend in the global wool market is the resurgence of consumer preference for natural fibers. As awareness of environmental issues grows, consumers are increasingly opting for products made from renewable and biodegradable materials. Wool, being a natural and sustainable fiber, aligns well with these preferences. The

fashion industry has witnessed a revival of interest in woolen garments, with designers and brands emphasizing the inherent qualities of wool, such as breathability, insulation, and softness. This trend is also evident in the home textile sector, with woolen blankets and carpets gaining popularity. The shift towards natural fibers reflects a broader movement towards eco-friendly choices, positioning wool as a desirable and environmentally conscious option in the global textile market.

E-commerce and Direct-to-Consumer Channels

The growth of e-commerce and direct-to-consumer (DTC) channels has had a significant impact on the global wool market. Online retail platforms and DTC models provide consumers with direct access to a wide range of woolen products, facilitating convenience and choice. This trend has been accelerated by the digitalization of shopping experiences and the ease of online transactions. Wool producers and brands are increasingly leveraging e-commerce platforms to reach a global audience, bypassing traditional distribution channels. The ability to connect directly with consumers allows for better communication of the unique qualities of wool, creating opportunities for niche and specialty wool products to find their market. The rise of e-commerce has reshaped the dynamics of the wool industry, necessitating a strategic approach to online marketing, branding, and customer engagement.

Focus on Circular Economy and Recycling

An emerging trend in the global wool market is the increasing emphasis on the circular economy and recycling. As sustainability becomes a central concern, there is a growing interest in extending the life cycle of wool products and minimizing waste. Wool, being a natural fiber, is biodegradable, but efforts are being made to enhance its recyclability. Some initiatives involve the collection and recycling of post-consumer wool products to create new textiles. Additionally, there is a focus on designing wool products with recyclability in mind, encouraging a closed-loop approach to production. The adoption of circular economy principles not only aligns with environmental goals but also positions wool as a responsible choice for consumers who prioritize the longevity and recyclability of their purchases.

In conclusion, the global wool market is experiencing notable trends that reflect the evolving landscape of consumer preferences, technological advancements, and sustainability initiatives. Stakeholders in the wool industry need to adapt to these trends to stay competitive and capitalize on emerging opportunities. The intersection of sustainability, innovation, and changing consumer behaviors is reshaping the narrative

of the global wool market, presenting exciting possibilities for those willing to embrace and navigate these dynamic trends.

Segmental Insights

Type Insights

The global wool market has witnessed a notable trend in the rising demand for fine wool, driven by shifting consumer preferences and the fashion industry's emphasis on premium quality textiles. Fine wool, typically sourced from specific breeds of sheep known for their fine and soft fibers, is coveted for its luxurious feel and superior characteristics. Consumers, particularly in high-end fashion and luxury segments, are increasingly valuing the comfort, warmth, and elegance offered by fine wool garments, leading to a surge in demand for products made from these premium fibers.

This growing appetite for fine wool is also propelled by a broader awareness of sustainability and ethical sourcing in the textile industry. Consumers are showing a preference for natural and renewable fibers, and fine wool aligns well with these eco-conscious choices. Producers in the global wool market are responding to this demand by emphasizing the quality of fine wool, promoting sustainable farming practices, and collaborating with fashion designers to create exquisite and environmentally friendly products. As the market continues to evolve, the rising demand for fine wool underscores its status as a sought-after commodity in the textile industry, offering both a luxurious experience for consumers and a lucrative niche for producers.

End User Insights

The global wool market is experiencing a significant uptick in demand from the commercial segment, marking a shift in the consumption patterns of woolen products. The commercial sector, including hospitality, corporate offices, and retail establishments, is increasingly recognizing the value of wool for its unique properties and aesthetic appeal. Wool's natural resilience, flame-retardant qualities, and ability to regulate temperature make it a preferred choice for commercial applications, especially in carpets, upholstery, and interior furnishings. As businesses prioritize creating inviting and comfortable spaces, the demand for wool in commercial settings has surged, driving growth in the global wool market.

Furthermore, the commercial segment's growing interest in sustainability and eco-friendly practices has contributed to the rise in demand for wool. Businesses are

seeking natural, biodegradable materials that align with their environmental goals, and wool fits this criterion. The durability of wool products also ensures a longer lifespan, reducing the need for frequent replacements and contributing to a more sustainable approach in the commercial sector. This trend not only reflects the adaptability of wool to various applications but also positions it as a versatile and environmentally conscious choice in the broader landscape of commercial interior design and furnishing.

Regional Insights

The Asia Pacific region is emerging as a pivotal player in the global wool market, with a substantial increase in demand driving the industry's growth. The rising affluence, changing lifestyles, and a burgeoning middle class in countries such as China and India have contributed to an increased appetite for premium woolen products. As consumers in the Asia Pacific region become more discerning and fashion-conscious, there is a notable surge in demand for high-quality wool apparel, including suits, coats, and luxury accessories. This trend aligns with the cultural significance of wool in certain Asian markets, where fine wool is often associated with prestige and elegance.

Moreover, the textile and fashion industries in the Asia Pacific region are expanding rapidly, providing further impetus to the demand for wool. As these industries evolve, there is a growing appreciation for the natural and sustainable attributes of wool, which resonates well with environmentally conscious consumers. Additionally, the region's cold climate zones, particularly in northern China, create a practical need for warm and insulating woolen garments, further fueling the demand. The Asia Pacific's increasing prominence in the global wool market underscores the strategic importance of this region for wool producers and businesses seeking to capitalize on the growing consumer base in this dynamic and economically vibrant part of the world.

Key Market Players

Pendleton Woolen Mills

American Woolen Company

B. Black Sons

Faribault Woolen Mill Co.

Canada Wool Growers Limited

James Johnston Company of Elgin Limited

Holland Sherry Group

Abraham Moon Sons Ltd.

Reda S.p.A.

Nanshan Group

Report Scope:

In this report, the Global Wool Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Wool Market,By Type:

oFine Wool

oMedium Wool

oCoarse Wool

oOthers

Wool Market,By Application:

oClothing

oCarpets

oBlankets

oOthers

Wool Market,By End User:

oResidential

oCommercial

Wool Market, By Region:

oAsia-Pacific

China

Japan

India

Vietnam

South Korea

oNorth America

United States

Canada

Mexico

oEurope

France

Germany

Spain

Italy

United Kingdom

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Turkey

Kuwait

Egypt

oSouth America

Brazil

Argentina

Colombia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Wool Market.

Available Customizations:

Global Wool Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1.INTRODUCTION

- 1.1.Product Overview
- 1.2.Key Highlights of the Report
- 1.3.Market Coverage
- 1.4.Market Segments Covered
- 1.5.Research Tenure Considered

2.RESEARCH METHODOLOGY

- 2.1.Objective of the Study
- 2.2.Baseline Methodology
- 2.3.Key Industry Partners
- 2.4.Major Association and Secondary Sources
- 2.5.Forecasting Methodology
- 2.6.Data Triangulation Validation
- 2.7.Assumptions and Limitations

3.EXECUTIVE SUMMARY

- 3.1.
- 3.2.Market Forecast
- 3.3.Key Regions
- 3.4.Key Segments

4.VOICE OF CUSTOMER

- 4.1.Factors Influencing Purchase Decision
- 4.2.Sources of Information

5.GLOBAL WOOL MARKET OUTLOOK

- 5.1.Market Size Forecast
 - 5.1.1.By Value
- 5.2.Market Share Forecast
 - 5.2.1.By Type Market Share Analysis (Fine Wool, Medium Wool, Coarse Wool, Others)

- 5.2.2.By Application Market Share Analysis (Clothing, Carpets, Blankets, Others)
- 5.2.3.By End User Market Share Analysis (Residential, Commercial)
- 5.2.4.By Regional Market Share Analysis
 - 5.2.4.1.Asia-Pacific Market Share Analysis
 - 5.2.4.2.North America Market Share Analysis
 - 5.2.4.3.Europe Market Share Analysis
 - 5.2.4.4.Middle East Africa Market Share Analysis
 - 5.2.4.5.South America Market Share Analysis
- 5.2.5.By Top 5 CompaniesMarketShare Analysis, Others (2023)
- 5.3.Global Wool Market Mapping Opportunity Assessment
 - 5.3.1.By TypeMarketMapping Opportunity Assessment
 - 5.3.2.By Application MarketMapping Opportunity Assessment
 - 5.3.3.By End UserMarketMapping Opportunity Assessment
 - 5.3.4.By RegionalMarketMapping Opportunity Assessment

6.ASIA-PACIFIC WOOL MARKET OUTLOOK

- 6.1.Market Size Forecast
 - 6.1.1.By Value
- 6.2.Market Share Forecast
 - 6.2.1.By Type Market Share Analysis
 - 6.2.2.By Application Market Share Analysis
 - 6.2.3.By End User Market Share Analysis
 - 6.2.4.By Country Market Share Analysis
 - 6.2.4.1.China Wool Market Outlook
 - 6.2.4.1.1.Market Size Forecast
 - 6.2.4.1.1.1.By Value
 - 6.2.4.1.2.Market Share Forecast
 - 6.2.4.1.2.1.By Type Market Share Analysis
 - 6.2.4.1.2.2.By Application Market Share Analysis
 - 6.2.4.1.2.3.By End User Market Share Analysis
 - 6.2.4.2.Japan Wool Market Outlook
 - 6.2.4.2.1.Market Size Forecast
 - 6.2.4.2.1.1.By Value
 - 6.2.4.2.2.Market Share Forecast
 - 6.2.4.2.2.1.By Type Market Share Analysis
 - 6.2.4.2.2.2.By Application Market Share Analysis
 - 6.2.4.2.2.3.By End User Market Share Analysis
 - 6.2.4.3.India Wool Market Outlook

- 6.2.4.3.1. Market Size Forecast
 - 6.2.4.3.1.1. By Value
- 6.2.4.3.2. Market Share Forecast
 - 6.2.4.3.2.1. By Type Market Share Analysis
 - 6.2.4.3.2.2. By Application Market Share Analysis
 - 6.2.4.3.2.3. By End User Market Share Analysis
- 6.2.4.4. Vietnam Wool Market Outlook
 - 6.2.4.4.1. Market Size Forecast
 - 6.2.4.4.1.1. By Value
 - 6.2.4.4.2. Market Share Forecast
 - 6.2.4.4.2.1. By Type Market Share Analysis
 - 6.2.4.4.2.2. By Application Market Share Analysis
 - 6.2.4.4.2.3. By End User Market Share Analysis
- 6.2.4.5. South Korea Wool Market Outlook
 - 6.2.4.5.1. Market Size Forecast
 - 6.2.4.5.1.1. By Value
 - 6.2.4.5.2. Market Share Forecast
 - 6.2.4.5.2.1. By Type Market Share Analysis
 - 6.2.4.5.2.2. By Application Market Share Analysis
 - 6.2.4.5.2.3. By End User Market Share Analysis

7. NORTH AMERICA WOOL MARKET OUTLOOK

- 7.1. Market Size Forecast
 - 7.1.1. By Value
- 7.2. Market Share Forecast
 - 7.2.1. By Type Market Share Analysis
 - 7.2.2. By Application Market Share Analysis
 - 7.2.3. By End User Market Share Analysis
 - 7.2.4. By Country Market Share Analysis
 - 7.2.4.1. United States Wool Market Outlook
 - 7.2.4.1.1. Market Size Forecast
 - 7.2.4.1.1.1. By Value
 - 7.2.4.1.2. Market Share Forecast
 - 7.2.4.1.2.1. By Type Market Share Analysis
 - 7.2.4.1.2.2. By Application Market Share Analysis
 - 7.2.4.1.2.3. By End User Market Share Analysis
 - 7.2.4.2. Canada Wool Market Outlook
 - 7.2.4.2.1. Market Size Forecast

- 7.2.4.2.1.1.By Value
- 7.2.4.2.2.Market Share Forecast
 - 7.2.4.2.2.1.By Type Market Share Analysis
 - 7.2.4.2.2.2.By Application Market Share Analysis
 - 7.2.4.2.2.3.By End User Market Share Analysis
- 7.2.4.3.Mexico Wool Market Outlook
 - 7.2.4.3.1.Market Size Forecast
 - 7.2.4.3.1.1.By Value
 - 7.2.4.3.2.Market Share Forecast
 - 7.2.4.3.2.1.By Type Market Share Analysis
 - 7.2.4.3.2.2.By Application Market Share Analysis
 - 7.2.4.3.2.3.By End User Market Share Analysis

8.EUROPE WOOL MARKET OUTLOOK

- 8.1.Market Size Forecast
 - 8.1.1.By Value
- 8.2.Market Share Forecast
 - 8.2.1.By Type Market Share Analysis
 - 8.2.2.By Application Market Share Analysis
 - 8.2.3.By End User Market Share Analysis
 - 8.2.4.By Country Market Share Analysis
 - 8.2.4.1.France Wool Market Outlook
 - 8.2.4.1.1.Market Size Forecast
 - 8.2.4.1.1.1.By Value
 - 8.2.4.1.2.Market Share Forecast
 - 8.2.4.1.2.1.By Type Market Share Analysis
 - 8.2.4.1.2.2.By Application Market Share Analysis
 - 8.2.4.1.2.3.By End User Market Share Analysis
 - 8.2.4.2.Germany Wool Market Outlook
 - 8.2.4.2.1.Market Size Forecast
 - 8.2.4.2.1.1.By Value
 - 8.2.4.2.2.Market Share Forecast
 - 8.2.4.2.2.1.By Type Market Share Analysis
 - 8.2.4.2.2.2.By Application Market Share Analysis
 - 8.2.4.2.2.3.By End User Market Share Analysis
 - 8.2.4.3.Spain Wool Market Outlook
 - 8.2.4.3.1.Market Size Forecast
 - 8.2.4.3.1.1.By Value

- 8.2.4.3.2. Market Share Forecast
 - 8.2.4.3.2.1. By Type Market Share Analysis
 - 8.2.4.3.2.2. By Application Market Share Analysis
 - 8.2.4.3.2.3. By End User Market Share Analysis
- 8.2.4.4. Italy Wool Market Outlook
 - 8.2.4.4.1. Market Size Forecast
 - 8.2.4.4.1.1. By Value
 - 8.2.4.4.2. Market Share Forecast
 - 8.2.4.4.2.1. By Type Market Share Analysis
 - 8.2.4.4.2.2. By Application Market Share Analysis
 - 8.2.4.4.2.3. By End User Market Share Analysis
- 8.2.4.5. United Kingdom Wool Market Outlook
 - 8.2.4.5.1. Market Size Forecast
 - 8.2.4.5.1.1. By Value
 - 8.2.4.5.2. Market Share Forecast
 - 8.2.4.5.2.1. By Type Market Share Analysis
 - 8.2.4.5.2.2. By Application Market Share Analysis
 - 8.2.4.5.2.3. By End User Market Share Analysis

9. MIDDLE EAST AFRICA WOOL MARKET OUTLOOK

- 9.1. Market Size Forecast
 - 9.1.1. By Value
- 9.2. Market Share Forecast
 - 9.2.1. By Type Market Share Analysis
 - 9.2.2. By Application Market Share Analysis
 - 9.2.3. By End User Market Share Analysis
 - 9.2.4. By Country Market Share Analysis
 - 9.2.4.1. South Africa Wool Market Outlook
 - 9.2.4.1.1. Market Size Forecast
 - 9.2.4.1.1.1. By Value
 - 9.2.4.1.2. Market Share Forecast
 - 9.2.4.1.2.1. By Type Market Share Analysis
 - 9.2.4.1.2.2. By Application Market Share Analysis
 - 9.2.4.1.2.3. By End User Market Share Analysis
 - 9.2.4.2. Saudi Arabia Wool Market Outlook
 - 9.2.4.2.1. Market Size Forecast
 - 9.2.4.2.1.1. By Value
 - 9.2.4.2.2. Market Share Forecast

- 9.2.4.2.2.1.By Type Market Share Analysis
- 9.2.4.2.2.2.By Application Market Share Analysis
- 9.2.4.2.2.3.By End User Market Share Analysis
- 9.2.4.3.UAE Wool Market Outlook
 - 9.2.4.3.1.Market Size Forecast
 - 9.2.4.3.1.1.By Value
 - 9.2.4.3.2.Market Share Forecast
 - 9.2.4.3.2.1.By Type Market Share Analysis
 - 9.2.4.3.2.2.By Application Market Share Analysis
 - 9.2.4.3.2.3.By End User Market Share Analysis
- 9.2.4.4.Turkey Wool Market Outlook
 - 9.2.4.4.1.Market Size Forecast
 - 9.2.4.4.1.1.By Value
 - 9.2.4.4.2.Market Share Forecast
 - 9.2.4.4.2.1.By Type Market Share Analysis
 - 9.2.4.4.2.2.By Application Market Share Analysis
 - 9.2.4.4.2.3.By End User Market Share Analysis
- 9.2.4.5.Kuwait Wool Market Outlook
 - 9.2.4.5.1.Market Size Forecast
 - 9.2.4.5.1.1.By Value
 - 9.2.4.5.2.Market Share Forecast
 - 9.2.4.5.2.1.By Type Market Share Analysis
 - 9.2.4.5.2.2.By Application Market Share Analysis
 - 9.2.4.5.2.3.By End User Market Share Analysis
- 9.2.4.6.Egypt Wool Market Outlook
 - 9.2.4.6.1.Market Size Forecast
 - 9.2.4.6.1.1.By Value
 - 9.2.4.6.2.Market Share Forecast
 - 9.2.4.6.2.1.By Type Market Share Analysis
 - 9.2.4.6.2.2.By Application Market Share Analysis
 - 9.2.4.6.2.3.By End User Market Share Analysis

10.SOUTH AMERICA WOOL MARKET OUTLOOK

- 10.1.Market Size Forecast
 - 10.1.1.By Value
- 10.2.Market Share Forecast
 - 10.2.1.By Type Market Share Analysis
 - 10.2.2.By Application Market Share Analysis

- 10.2.3.By End User Market Share Analysis
- 10.2.4.By Country Market Share Analysis
 - 10.2.4.1.Brazil Wool Market Outlook
 - 10.2.4.1.1.Market Size Forecast
 - 10.2.4.1.1.1.By Value
 - 10.2.4.1.2.Market Share Forecast
 - 10.2.4.1.2.1.By Type Market Share Analysis
 - 10.2.4.1.2.2.By Application Market Share Analysis
 - 10.2.4.1.2.3.By End User Market Share Analysis
 - 10.2.4.2.Argentina Wool Market Outlook
 - 10.2.4.2.1.Market Size Forecast
 - 10.2.4.2.1.1.By Value
 - 10.2.4.2.2.Market Share Forecast
 - 10.2.4.2.2.1.By Type Market Share Analysis
 - 10.2.4.2.2.2.By Application Market Share Analysis
 - 10.2.4.2.2.3.By End User Market Share Analysis
 - 10.2.4.3.Colombia Wool Market Outlook
 - 10.2.4.3.1.Market Size Forecast
 - 10.2.4.3.1.1.By Value
 - 10.2.4.3.2.Market Share Forecast
 - 10.2.4.3.2.1.By Type Market Share Analysis
 - 10.2.4.3.2.2.By Application Market Share Analysis
 - 10.2.4.3.2.3.By End User Market Share Analysis

11.MARKET DYNAMICS

- 11.1.Drivers
- 11.2.Challenges

12.IMPACT OF COVID-19 ON GLOBAL WOOL MARKET

- 12.1.Impact Assessment Model
 - 12.1.1.Key Segments Impacted
 - 12.1.2.Key Regions Impacted
 - 12.1.3.Key Countries Impacted

13.MARKET TRENDS DEVELOPMENTS

14.COMPETITIVE LANDSCAPE

14.1. Company Profiles

14.1.1. Pendleton Woolen Mills

14.1.1.1. Company Details

14.1.1.2. Products

14.1.1.3. Financials (As Per Availability)

14.1.1.4. Key Market Focus Geographical Presence

14.1.1.5. Recent Developments

14.1.1.6. Key Management Personnel

14.1.2. American Woolen Company

14.1.2.1. Company Details

14.1.2.2. Products

14.1.2.3. Financials (As Per Availability)

14.1.2.4. Key Market Focus Geographical Presence

14.1.2.5. Recent Developments

14.1.2.6. Key Management Personnel

14.1.3. Black Sons

14.1.3.1. Company Details

14.1.3.2. Products

14.1.3.3. Financials (As Per Availability)

14.1.3.4. Key Market Focus Geographical Presence

14.1.3.5. Recent Developments

14.1.3.6. Key Management Personnel

14.1.4. Faribault Woolen Mill Co.

14.1.4.1. Company Details

14.1.4.2. Products

14.1.4.3. Financials (As Per Availability)

14.1.4.4. Key Market Focus Geographical Presence

14.1.4.5. Recent Developments

14.1.4.6. Key Management Personnel

14.1.5. Canada Wool Growers Limited

14.1.5.1. Company Details

14.1.5.2. Products

14.1.5.3. Financials (As Per Availability)

14.1.5.4. Key Market Focus Geographical Presence

14.1.5.5. Recent Developments

14.1.5.6. Key Management Personnel

14.1.6. James Johnston Company of Elgin Limited

14.1.6.1. Company Details

- 14.1.6.2.Products
- 14.1.6.3.Financials (As Per Availability)
- 14.1.6.4.Key Market Focus Geographical Presence
- 14.1.6.5.Recent Developments
- 14.1.6.6.Key Management Personnel
- 14.1.7.Holland Sherry Group
 - 14.1.7.1.Company Details
 - 14.1.7.2.Products
 - 14.1.7.3.Financials (As Per Availability)
 - 14.1.7.4.Key Market Focus Geographical Presence
 - 14.1.7.5.Recent Developments
 - 14.1.7.6.Key Management Personnel
- 14.1.8.Abraham Moon Sons Ltd.
 - 14.1.8.1.Company Details
 - 14.1.8.2.Products
 - 14.1.8.3.Financials (As Per Availability)
 - 14.1.8.4.Key Market Focus Geographical Presence
 - 14.1.8.5.Recent Developments
 - 14.1.8.6.Key Management Personnel
- 14.1.9.Redda S.p.A.
 - 14.1.9.1.Company Details
 - 14.1.9.2.Products
 - 14.1.9.3.Financials (As Per Availability)
 - 14.1.9.4.Key Market Focus Geographical Presence
 - 14.1.9.5.Recent Developments
 - 14.1.9.6.Key Management Personnel
- 14.1.10.Nanshan Group
 - 14.1.10.1.Company Details
 - 14.1.10.2.Products
 - 14.1.10.3.Financials (As Per Availability)
 - 14.1.10.4.Key Market Focus Geographical Presence
 - 14.1.10.5.Recent Developments
 - 14.1.10.6.Key Management Personnel

15.STRATEGIC RECOMMENDATIONS/ACTION PLAN

- 15.1.Key Focus Areas
- 15.2.Target Type
- 15.3.Target Application

16. ABOUT US DISCLAIMER

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