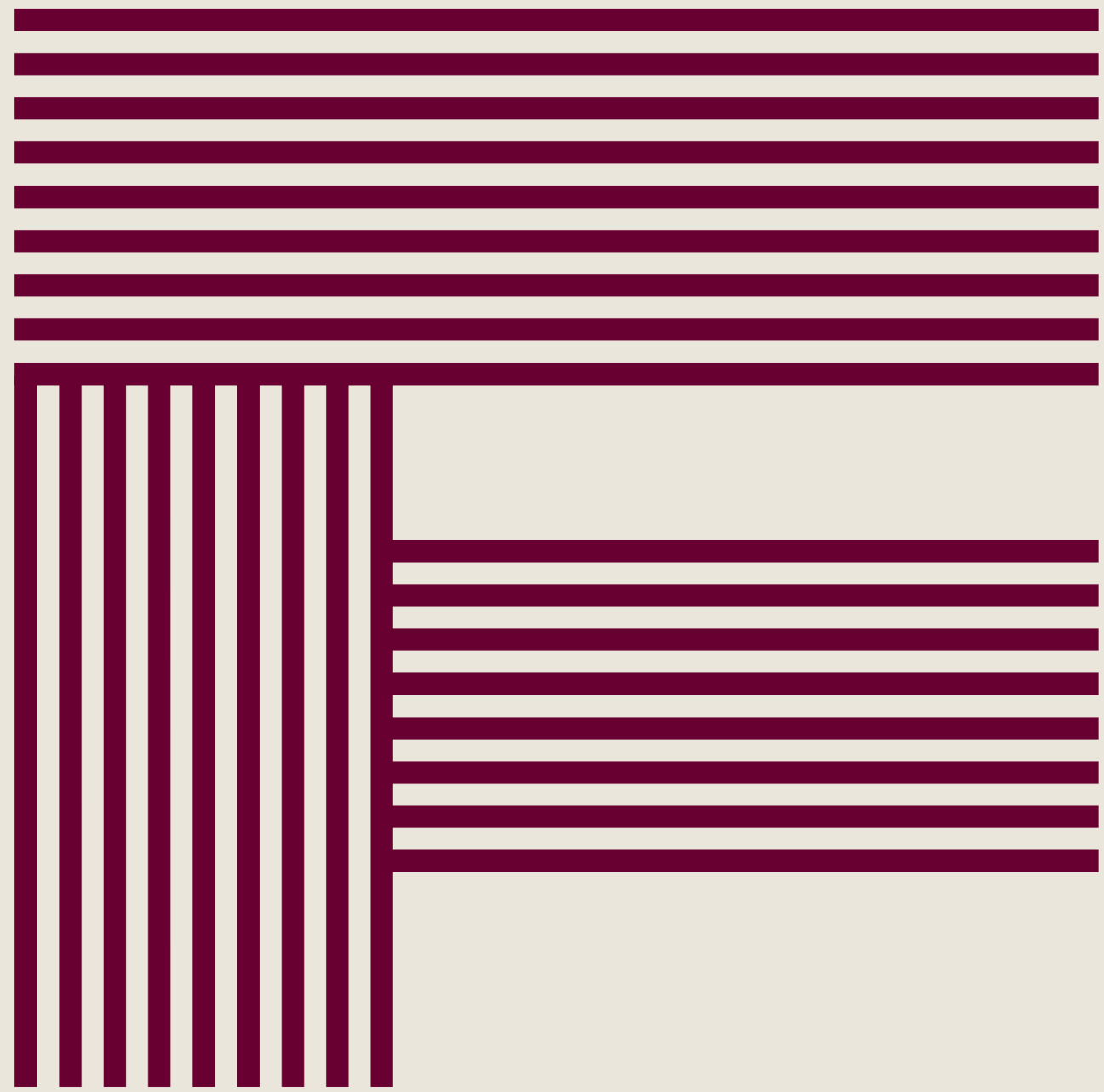


Future of Fibre Aotearoa

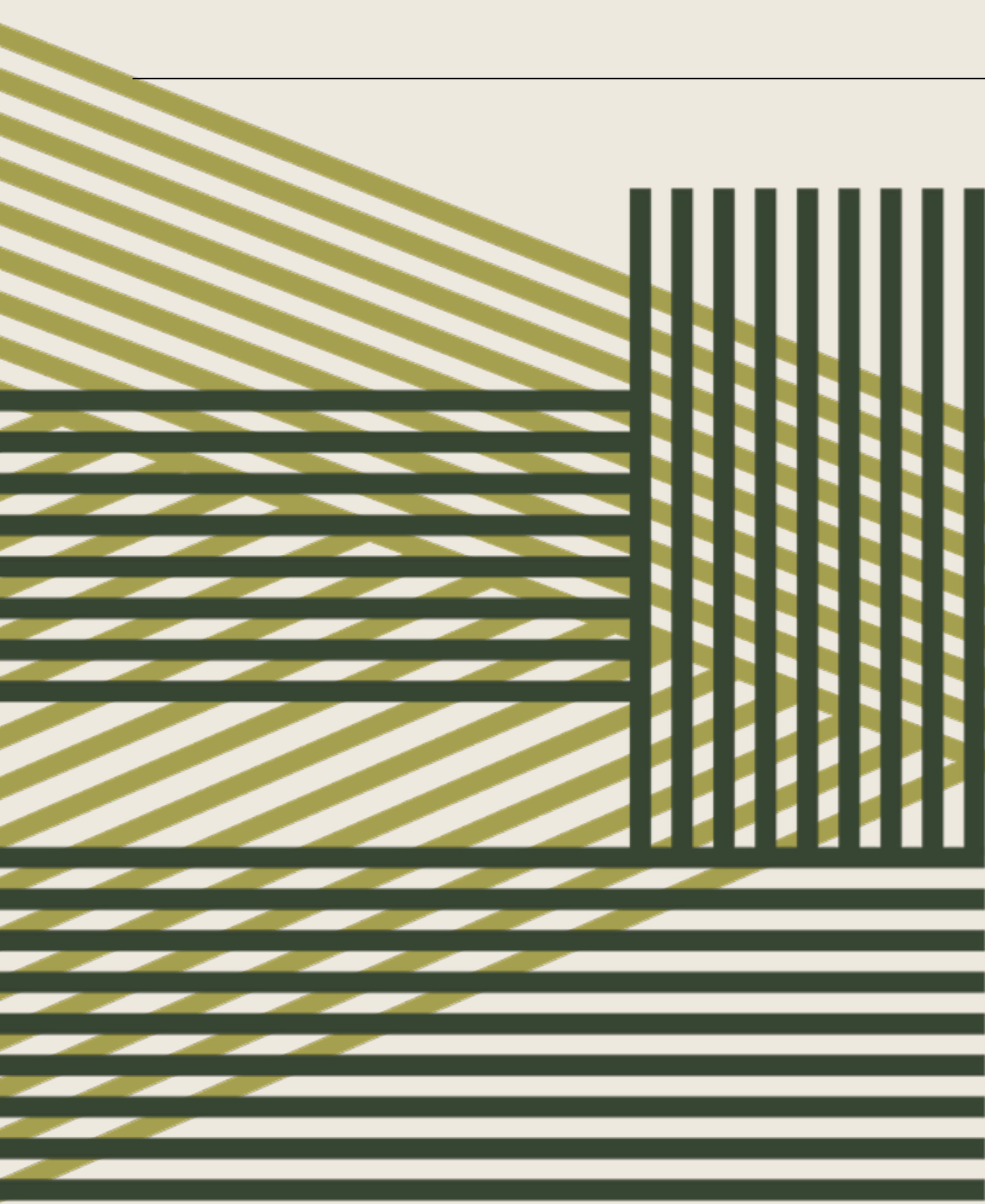


Emerging Insights

20 May 2026



About Future of Fibre Aotearoa



Future of Fibre Aotearoa is an industry-led initiative committed to unlocking value across New Zealand's fibre ecosystem, from raw material production to finished product and back again.

Future of Fibre Aotearoa aims to reposition fibre as a flagship of NZ's high-value economy by delivering sector research, foundational insights and pilot projects focused on innovation, design, and locally embedded systems.

As a cross-sector enabler, Future of Fibre Aotearoa connects, celebrates and supports the fibre sector to realise its potential as a central part of our bioeconomy and cultural narrative.

The initiative is led by Fashion & Textiles New Zealand with support from AGMARDT's The Common Ground.

Year 1: Foundations

- **Ecosystem Mapping** - to understand and define fibre positioning, challenges, opportunities.
- **Threads of Tomorrow Summit** - industry engagement, roadmap & pilot planning.
- **Foundational Fibre Report** - comprehensive analysis of current state and potential.

Year 2: Activation (to be confirmed)

- **Fibre Action Plan** co-created with industry
- **Digital Fibre Platform**
- **Pilot Projects**

Programme purpose

Future of Fibre Aotearoa Programme

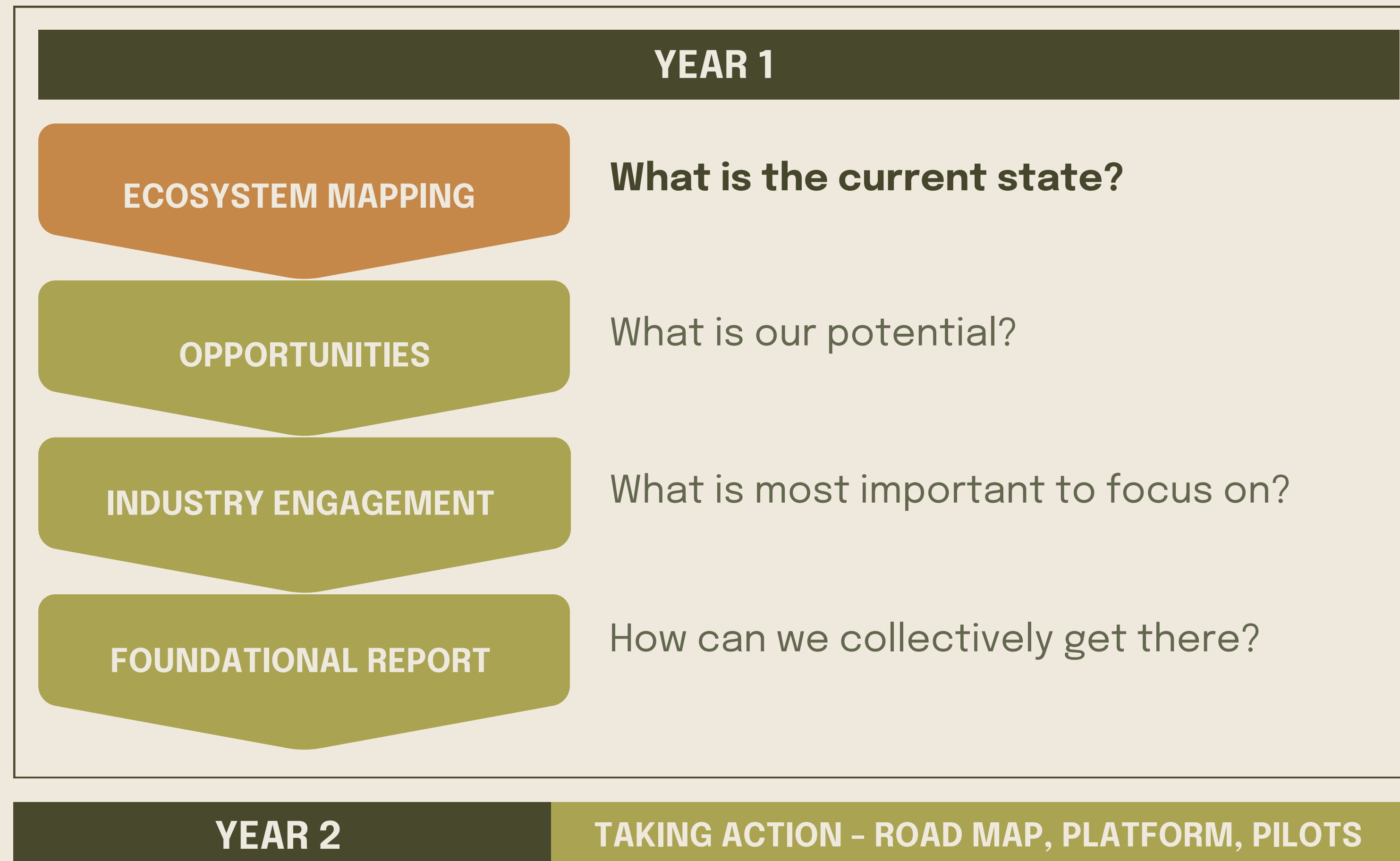
Develop the opportunity for fibre, to increase the value of Aotearoa's fibre sector, for our economy, businesses, communities and environment.



Future
of Fibre
Aotearoa

What we are doing

Future of Fibre Aotearoa Programme



What is fibre?

Fibre scope and definition

Any raw, minimally processed material that can be transformed into textiles, composites and products.

Established

- Existing commercial industries and market applications
- Innovation drives new category, product and market development.

Wool, skins & hides, possum

Emerging

- Commercial activity exists
- Industries are still developing, in their infancy or being re-established.

Hemp, harakeke, mohair, alpaca, cashmere

Experimental

- New or exploratory fibre sources
- Innovations currently at a research, prototype, or early development stage.

Fermented fibres, forestry/marine derived cellulosic biomaterials, mycelium etc

Where does our fibre go

Products & applications

Apparel & Footwear

- Driven by brand & design capability
 - Strong sustainability positioning
 - Demand for fine natural fibre types, including blends
 - Small industrial scale in New Zealand
-

Interiors

- Established markets such as carpets, rugs and upholstery
 - Durable, design-led products with strong sustainability positioning
-

Built Environment

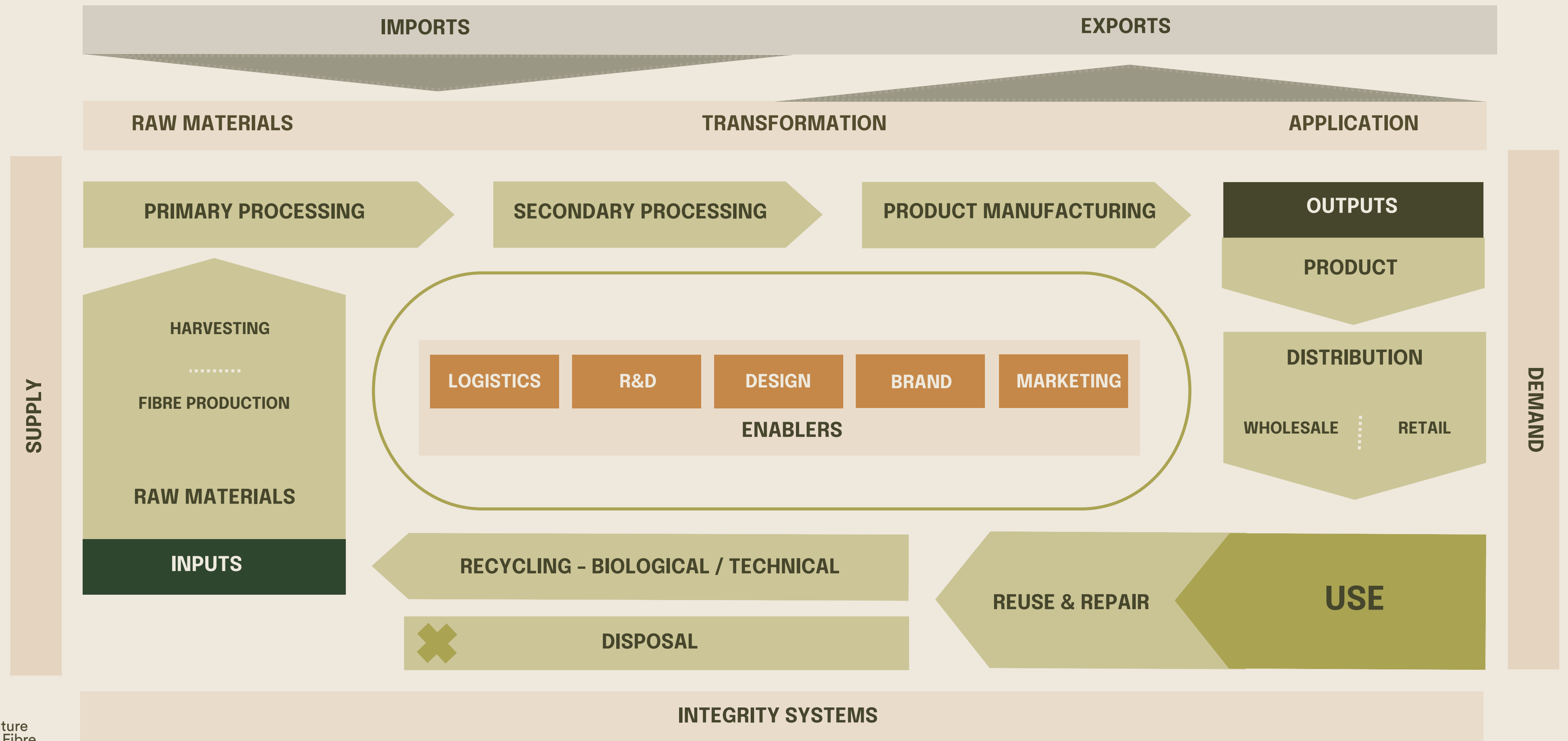
- Construction materials, including acoustics, insulation
 - Composites for performance e.g. fire safety, temperature/humidity control
-

Technical & Advanced Materials

- Niche high-value applications
- Biomaterials and composites
- Industrial materials

Fibre system map

How fibre is transformed across the system



New Zealand fibre snapshot

Estimated fibre farm-gate volume and value 2025

171,530t

New Zealand Fibre farm-gate
production volume (tonnes)




\$926.5m

New Zealand Fibre Farm-gate value (NZD)



New Zealand fibre snapshot

New Zealand fibre supply and farm-gate value, 2025

	Fibre	Volume (t)	Value (NZD)
 Established	Wool	114,600	\$540m
	Skins and hides	54,050	\$372m
 Emerging	Mohair	31	\$0.4m
	Cashmere	1	\$0.1m
	Alpaca	33	\$0.5m
	Hemp	540	\$1m
	Harakeke	175	1.5m
 Experimental	Forestry - residual biomass	-	-
	Food - residual biomass	-	-
	Textile waste	~2,100	\$11m
Total (Estimate)		171,530t	\$926.5m

Local manufacturing snapshot

New Zealand domestic manufacturing - apparel, carpet and textiles (2025)

93,000t

Estimated apparel, carpet and textiles goods manufactured in New Zealand (tonnes)

\$1.85b

New Zealand domestic textile, carpet and apparel manufacturing sector revenue (NZD)



New Zealand manufacturing snapshot

New Zealand domestic textile and apparel manufacturing, 2025

	# of enterprises	# of activities	# of employees	Estimated sector revenue (NZD)	Notes
Textiles	804	797	5,111	\$1420m	<i>Range estimated \$1400-1500</i>
Apparel & Footwear	513	561	2,295	\$430m	<i>Range estimated \$400-450m</i>
Total (Estimate)	1,317	1,353	7,410	\$1.85b	<i>Range estimated \$1.8-1.95b</i>

Material flow snapshot

High level material flows estimates for fibre and beyond (2025)

New Zealand fibre production & export

- We produce approx **172,000t** of fibre.
- Majority is exported after early stage processing.

Imports into New Zealand

- We import **116,000t** of yarn, fabric, apparel, carpet & textiles.
- This includes locally-produced fibre that has been processed overseas.

Domestic manufacturing & export

- **\$1.85bn** Domestic textile, carpet and apparel manufacturing sector revenue
- **93,000t** Domestic manufacturing of apparel, carpet & textiles, made from local and overseas materials.
- Of this, approx **11,000t** is exported.

Consumption & end-of-life

- Our apparel, textiles & carpet consumption is **187,000t**.
- Approx **179,000t** of textile waste generated.

What we've found

Key insights from ecosystem mapping

The future of New Zealand's fibre sector will not only be defined by what we produce, but by **how we transform fibre into high-value products, materials and systems** that meet real market needs.

What New Zealand Does Well

New Zealand has a strong competitive advantage

Premium fibre is combined with design-led innovation.

Material properties are translated into **functional, market-ready products**.

Strong, **direct relationships** connect the value chain - from fibre to end-use.

Underpinned by provenance, transparency and trust.

System Constraints

What's holding the system back

Despite producing globally recognised natural fibres, the New Zealand fibre ecosystem faces several structural barriers that limit its ability to capture value locally.

1

Fragmentation
Across the Sector

2

Limited
Processing &
Manufacturing
Capability

3

Weak Pathways
from Innovation
to Market

4

Skills Loss &
Capability Gaps

5

Demand Creation
& Market Access

Summary of Findings

What We Heard Is Working

- World-class natural fibre production with an authentic provenance and transparency story.
- Pockets of applied innovation and design-led product development capability.
- Relationship-based value chains (direct grower-maker-brand/specifier links) that improve quality feedback loops, traceability, storytelling, and margin.
- Values-led and IP-driven business models, including place-based and culturally grounded fibre systems (particularly relevant for tikanga/mātauranga-informed pathways).
- Emerging opportunities to replace synthetics where regulation and customer demand increasingly favour natural alternatives.

What's Holding The System Back

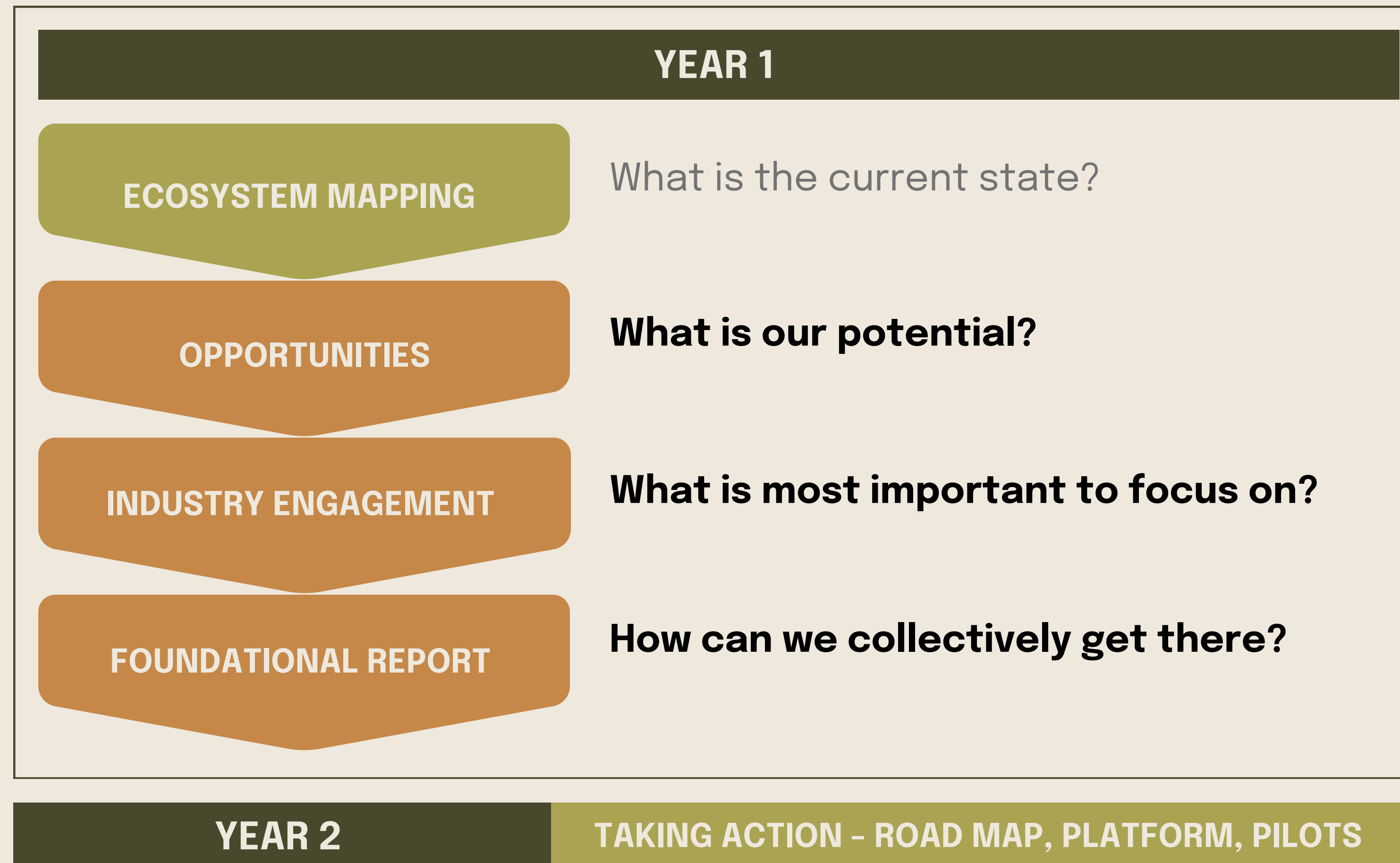
- Limited market connection, access and demand development: Many parts of the system lack visibility of global market dynamics and the resources to build sustained in-market presence. As a result, demand creation is underdeveloped, limiting the ability to translate fibre attributes into products that meet demand and scale globally.
- Fragmentation across fibres, regions and value chain stages limit coordination, knowledge sharing and collective strategy, slowing progress and weakening scale
- Gaps in processing and manufacturing infrastructure, with limited mid-scale capability constraining the ability to prototype, test, and scale products toward commercial production.
- Limited mechanisms to move from innovation to commercialisation, including access to prototyping, validation, partners and capital.
- Skills loss and succession risk in specialised textile and manufacturing roles, compounded by limited formal training pathways.
- Limited investment and system understanding: Access to funding and capital remains challenging, compounded by limited understanding of the sector's value and needs.

Growing Value

- Value is created where fibre is transformed into finished products, performance materials, and branded goods.
- Brands are central to value creation, translating fibre into demand, premiums, and global recognition.
- Value grows when value chains connect: direct relationships outperform anonymous commodity dynamics.
- NZ has a clear advantage when competing through premium, design-led differentiation.
- Sustainability creates value when it is aligned with market demand.
- Global shifts toward natural fibres and biomaterials present emerging opportunities.
- Different fibre streams require distinct strategies to realise their full value

Next Steps

Future of Fibre Aotearoa Programme



Get in touch

Kelly McClean | Programme Lead: Kelly@commonkind.nz

Jacinta FitzGerald | Programme Director: Jacinta@fashiontextilesnz.org