

Socio-Economic Impact Assessment of the Harris Tweed® Industry

A report to the Harris Tweed Authority, Highlands and Islands Enterprise and Comhairle nan Eilean Siar
February 2026





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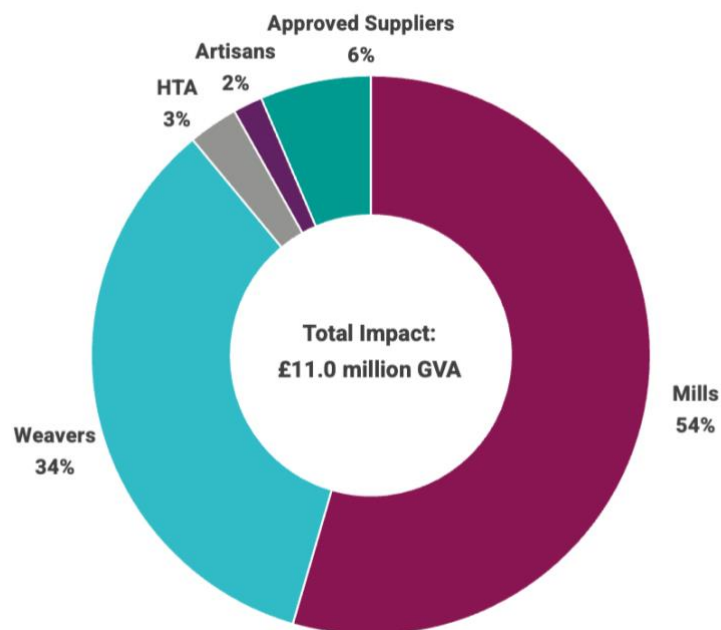


Executive Summary

Harris Tweed®: rugged, authentic, and versatile. A colourful, traditional woollen cloth produced in the Outer Hebrides. Born of domestic necessity, the production evolved into a successful commercial enterprise in the early 1900s and now embodies the very character of the Islands.

In 2024, the sector generated £16.8 million Gross Value Added (GVA) and supported 520 jobs across Scotland. Crucially, most of this impact was retained locally, with the sector contributing £11.0 million GVA and supporting 370 jobs in the Outer Hebrides, of which more than half was generated by the mills.

Figure ES1 Breakdown of Outer Hebrides GVA Impact



This impact has almost doubled (in real terms) since 2009, confirming the sector has successfully emerged from a period of significant uncertainty in the early 2000s.

In 2024, Harris Tweed® generated £16.8 million GVA and supported 520 jobs across Scotland.





But the figures represent more than financial returns. The industry provides much-needed employment in some of the most remote and economically fragile communities in Scotland, countering depopulation and supporting rural resilience. It is also a powerful custodian of cultural value.

Dualchas

The value of Harris Tweed® extends far beyond the balance sheet. The fabric is a tangible expression of dualchas, a Gaelic concept representing the deep connection between people, culture, language, and the land.

- **Cultural Custodian:** The colours, patterns, and textures of the cloth reflect the Hebridean landscape, serving as a powerful symbol of island identity and fostering a sense of belonging.
- **Tourism Driver:** This strong cultural identity is an important motivator for visitors, helping underpin the Islands' unique brand and contributing to tourism activity worth between £45 and £69 million per year.
- **Global Ambassador:** Exported to more than 50 countries, Harris Tweed® is a global ambassador, raising the profile of the Outer Hebrides as a world-class destination for heritage and craft.

A Changing Role



Traditionally, Harris Tweed® played a unique role in maintaining the demographic and social structure of the Outer Hebrides. The requirement for the fabric to be woven by islanders in their own homes anchored people to the Islands and provided flexible, supplementary income that helped sustain crofting families.

Current production and employment levels suggest that for many, weaving is no longer supplementary income, but a livelihood; the analysis suggests financial returns may not reflect this. In the context of the modern gig economy, what might once have been useful additional income, may now have different connotations.

With nearly three-quarters of the weaving workforce aged over 50, and social credentials being fundamental to the Harris Tweed® brand, this represents an existential threat to the industry.

Strategic Outlook: Securing the Future

While the industry is stable, future success depends on leveraging the Harris Tweed® brand to secure greater benefits for those involved. The foundations for doing this are already in place. By rigorously protecting the brand, the HTA has created the stable environment needed for local businesses to innovate and expand into higher-value activities, ensuring more wealth is retained in the Outer Hebrides.



Specific opportunities identified include:

- **R&D:** Building local engineering and fabrication capacity and/or establishing 3D printing capability on the Islands, could simplify equipment maintenance. This would reduce costs, avoid delays, and support mechanical innovation.
- **Marketing:** Leveraging the strong social and environmental credentials of Harris Tweed® to position the fabric as the ultimate "slow luxury" textile, establishing brand loyalty amongst younger, conscious consumers.
- **Marketing:** Tapping into growing demand for experiential tourism, particularly amongst high-net-worth travellers, by developing new ways of connecting Harris Tweed® production with visitor experiences.

Conclusion

Harris Tweed® is a unique asset: a sector delivering substantial economic value while helping to sustain the cultural identity of the Outer Hebrides. Focusing on distributive growth and moving up the value chain can help ensure this iconic industry continues to support the resilience of island life for generations to come.



1. Introduction

This report considers the value of the Harris Tweed® to the Outer Hebrides and Scottish economies.

In September 2025, the Harris Tweed Authority (HTA), Highlands and Islands Enterprise (HIE) and Comhairle nan Eilean Siar commissioned BiGGAR Economics to assess the economic impact of the Harris Tweed® industry and to provide insight on its wider social contribution. This report presents the findings of that analysis.

1.1 Harris Tweed®

Harris Tweed® is a durable traditional fabric unique to the Outer Hebrides. Originally developed for practical use against the Islands' harsh climate, it was once an entirely domestic industry that involved islanders' hand-spinning yarn, often using wool from their own sheep, and weaving it into cloth on domestic looms using locally sourced raw materials.

The name 'Harris Tweed®' was first applied around 1840 when the Countess of Dunmore took an interest in the fabric and began promoting it to the aristocracy. The fabric quickly established a reputation for quality and durability, helping lay the groundwork for subsequent commercialisation beyond the Islands.

As demand grew, the need to protect the product from imitations began to emerge. In 1909, the Orb trademark was established, legally guaranteeing the fabric's authenticity and geographic origin. Later codified by the 1993 Harris Tweed Act, the law mandates that Harris Tweed® must be:

“Handwoven by the islanders at their homes in the Outer Hebrides, finished in the Outer Hebrides, and made from pure virgin wool dyed and spun in the Outer Hebrides”

Harris Tweed Act 1993

This stringent legal protection is enforced by the HTA, an independent statutory body that acts as the guardian of the brand, ensuring the fabric retains its status as a legally defined and globally recognised product.



1.1.1 Recent Changes in the Industry

Harris Tweed® has been produced in the Outer Hebrides since the 1600s. As a commercial enterprise it reached its zenith in 1966, when production was at an all-time high of 7.0 million meters of cloth/year, but more difficult times were to follow.

As Scotland de-industrialised, Harris Tweed® entered a long period of decline. This decline was accelerated in 2006 when the main mill in Stornoway (Kenneth MacKenzie Ltd) was sold to a Yorkshire businessman who cut the number of patterns from several thousand to only four, intended solely for the gents' jacket market.

By 2009, production had fallen to less than 200,000 meters/year and the industry was on the brink of collapse, prompting local investors to establish a rival company, Harris Tweed Hebrides to reinstate a mothballed mill at Shawbost. The new company restored relationships with customers, reintroduced a wide range of patterns and targeted high-end fashion markets and revitalising the industry.

By 2017 production of Harris Tweed® had rebounded to around 1.5 million double width meters per year and in 2019 the Haggas-owned mill was gifted to its manager.

1.2 The Production Process

Harris Tweed® is made from **virgin (unused and unprocessed) wool**. Historically, this often came from the Islands' sheep but as demand increased, this was no longer feasible and today, comes from across the UK.

The wool is processed into yarn in one of the Islands' **three mills**. It is first dyed, then carded, twisted, spun and wound onto bobbins to create weft (left to right) and warp (vertical) threads. The warp threads are then wound onto large beams ready to be delivered, together with yarn for the weft, to the Islands' small army of **self-employed weavers**, who weave the yarn into fabric using looms.

Once complete, fabric is returned to the mills for **finishing** before being examined by an independent inspector from the HTA who confirms the fabric meets the required standard before applying the Orb certification mark.

Most finished Harris Tweed® is then sold either to trade customers or retailers.

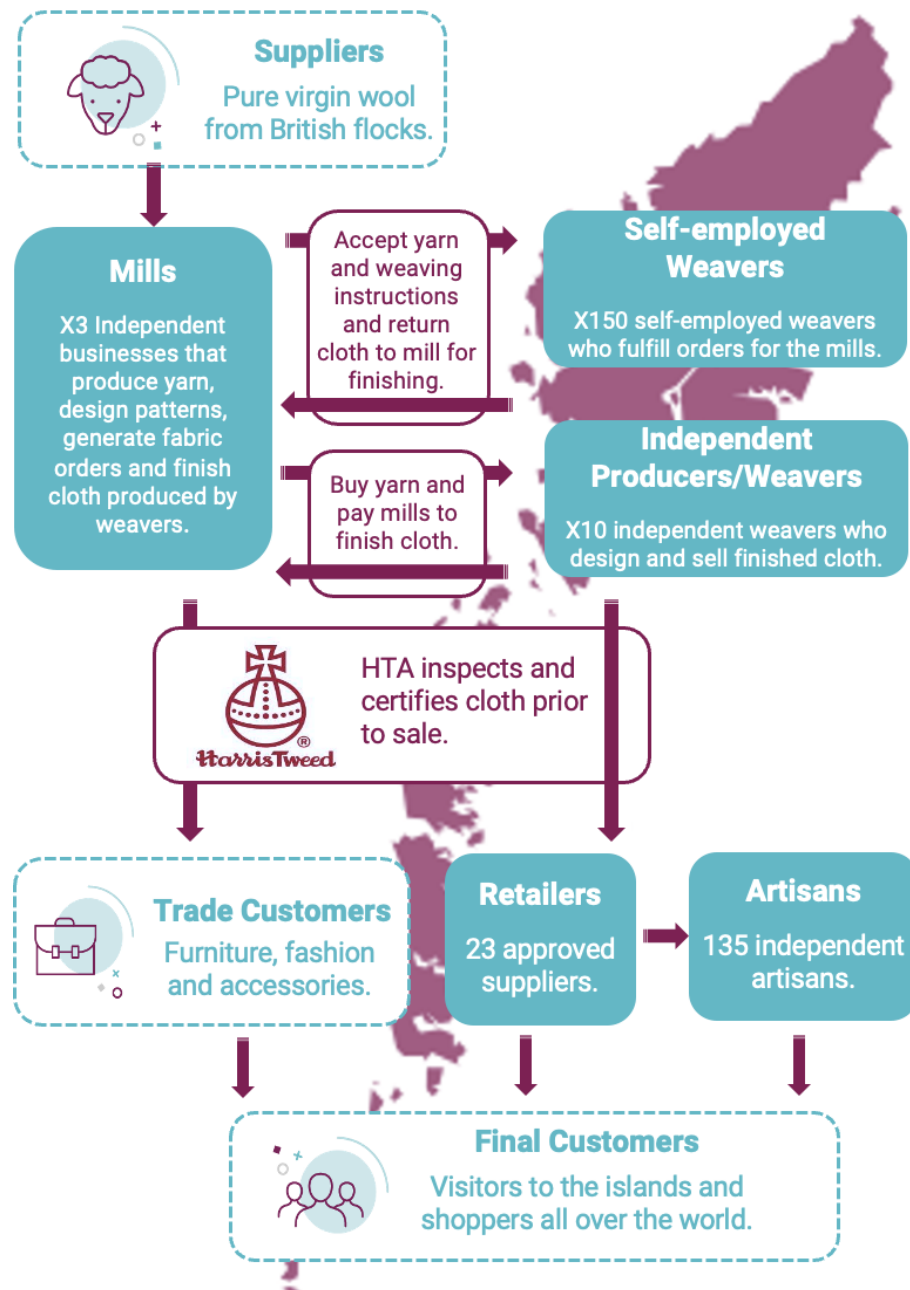
Trade customers include fashion houses that use Harris Tweed® to make jackets, suits and other garments; furniture makers, which use the fabric as upholstery; and manufacturers who use it to produce accessories like bags, purses and wallets.

There are also 23 **retailers** of Harris Tweed® on the Islands. These have traditionally focused on selling cut lengths of fabric to bespoke tailors and home sewers. However, this has started to change with the emergence of a new segment of **independent artisans**, who use Harris Tweed® to produce a variety of items, which are then sold to tourists and on-line.



This report considers the economic and social value generated by this production, which is depicted visually in Figure 1-1.

Figure 1-1 Harris Tweed® Production Cycle



Source: BiGGAR Economics adapted from information supplied by HTA

1.3 Approach

The information needed for this analysis was obtained through a mixture of primary and secondary research. Information about the scale of production was provided by



the HTA and individual mills¹. This was supplemented by an online survey of weavers and artisans and consultations with individuals with expert insight into the sector.

BiGGAR Economics is very grateful to everyone who contributed to the research, without whose assistance this report could not have been produced.

1.3.1 Measures of Economic Impact

The impact of each stage of this process was assessed for three study areas: the Outer Hebrides (defined as the local authority of 'Na h-Eileanan Siar'), Highlands and Islands, and Scotland as a whole.

Throughout this report economic impacts are measured using two metrics:

- **Gross value added (GVA)** – a widely used measure of economic activity that measures the contribution an enterprise makes by considering the difference between final output and the intermediate costs of production; and
- **Employment - which is measured in terms of headcount jobs supported.**

1.3.2 Sources and Types of Impact

For each stage of the production process, the following sources of economic impact illustrated in Figure 1-2 were considered where relevant, and quantified.

Figure 1-2 Sources of Impact

Direct Impact	• The direct impact of a business is estimated by calculating the difference between the total income it generates, and the value of the supplies needed to generate this income, as well as the number of people the business employs.
Staff Expenditure	• An organisation supports economic activity through the spending of its staff, who spend money in the economy on goods and services.
Supply Chain Expenditure	• An organisation also supports economic activity through its spending in the supply chain on goods and services. This expenditure supports these businesses to operate and employ staff.
Capital Expenditure	• An organisations can also support economic activity through capital expenditure, which includes maintaining and acquiring assets such as building and equipment.
Tourism Expenditure	• Visitors to the Outer Hebrides support economic activity by spending money in the local economy during their visit, which supports local businesses to operate and employ staff.

The direct, indirect and induced impact of each source of impact is considered. The total economic impact is the combined value of these impacts.

¹ Some of this data has been omitted from this report to preserve commercial confidentiality.

Figure 1-3 Types of Impact



1.4 Report Structure

The remainder of this report is structured as follows:

- Section 2 considers the socio-economic impact of the mills;
- Section 3 quantifies the economic impact of the weavers;
- Section 4 outlines the impact of the HTA and its role in safeguarding the brand;
- Section 5 estimates the economic impact of artisans;
- Section 6 considers Harris Tweed® as a driver of tourism;
- Section 7 outlines the industry's contribution to population retention;
- Section 8 highlights the key challenges and opportunities for the industry; and
- Section 9 provides a summary of the findings of this study.



2.

The Mills

This section considers the socio-economic impact of the virgin wool being processed, dyed, spun and warped by the Harris Tweed® mills.

This section considers the socio-economic impact of the private mills within the industry who independently secure the volume orders needed to maintain viable production across the industry. The mills utilise small-batch production methods to create the yarn used to weave Harris Tweed®. This is a traditional woollen manufacturing process that includes yarn production, yarn warping, fabric mending, wet and dry finishing processes, along with the associated mill operations which support these key production stages.

The first stage starts by fibre dyeing virgin wool, the dyed wool is then blended, carded and spun to produce each individual woollen yarn shade. The fabric design prepared by the mill team is translated onto a weaving card, which indicates the exact order of yarn within the fabric structure used to create the final pattern (warp and weft yarn). The warp is prepared in the mill and delivered to the Harris Tweed Authority registered weaver's home on a weaver's beam, along with the matching weft yarn – these are the tools each weaver requires to handweave a new project.

This activity generates economic activity and supports employment through the mills' direct operations, spending by mill staff and the money the mills spend on goods and services elsewhere in the supply chain. The impact of this activity is considered below.

2.1 The Process

There are three Harris Tweed® mills in the Outer Hebrides, including Kenneth Mackenzie Ltd in Stornoway, Harris Tweed Hebrides Ltd in Shawbost, and the Carloway Mill in Carloway.

The mills play an important role in securing orders from an international customer base, which subsequently leads to the procurement of the wool fibre, the preparation of blended yarn shades for each woven pattern, and the progress of the commercial order through each of the manufacturing stages. The private mills are responsible for funding and managing the business-to-business commercial transactions which deliver the economic impact from each of the manufacturing processes covered by the Harris Tweed Act 1993, including yarn production, home-weaving, and finishing.



In terms of productivity, at approximately £41,700 GVA per job, these jobs are slightly below the average GVA per head across the region (£47,000/head in 2023), but considerably higher than that of other important sectors of the Islands' economy, including Arts, Entertainment and Recreation³, and Accommodation and Food Service Activities, which generated £15,400 and £13,400 GVA per job⁴, respectively.

2.2.2 Staff Expenditure

As outlined in Section 1.3.2, when staff spend their wages, this generates economic impact by supporting businesses to expand operations and employ more people.

It was assumed that everyone working for the mills lived in the Outer Hebrides. Based on analysis of the Input Output Tables and household spending patterns, it was assumed that members of staff of the mills spent 50% of their salaries in the Outer Hebrides, 60% in the Highlands and Islands, and 75% in Scotland.

By applying economic ratios and multipliers relevant to household spending, the economic impact of mill staff expenditure in 2024 was estimated to be:

- £1.1 million GVA and 15 jobs in the Outer Hebrides;
- £1.5 million GVA and 20 jobs in the Highlands and Islands; and
- £2.2 million GVA and 35 jobs in Scotland.

2.2.3 Supply Expenditure

The mills also support economic activity through their expenditure on the goods and services required to enable the mills to fulfil their core operations and produce yarn. This impact was estimated based on data provided by the mills but has been omitted to preserve confidentiality.

To prevent double counting, the mills' expenditure on weavers and the Harris Tweed Authority was subtracted from this expenditure.

To estimate the economic impact from the mills total spending on supplies, each category of expenditure was assigned an industrial sector from the UK's Standard Industrial Classification (SIC) codes. Direct GVA and employment impacts were estimated by applying sector appropriate economic ratios. Sector appropriate multipliers were then applied to estimate indirect and induced impacts.

Following this approach, it was estimated that the mills' expenditure on goods and services in 2024 generated:

- £0.1 million GVA and <5 jobs in the Outer Hebrides;
- £0.7 million GVA and 10 jobs in the Highlands and Islands; and
- £2.8 million GVA and 35 jobs in Scotland.

³ This figure excludes gambling.

⁴ Office for National Statistics (2024). Annual Business Survey.



2.2.4 Capital Expenditure

The mills also generate economic impact locally through capital expenditure, such as investing in new buildings or equipment. This expenditure can benefit local construction firms, sub-contractors and service providers.

Investment in capital projects is likely to fluctuate significantly year-to-year. Therefore, average spend per year was estimated using data provided by relevant stakeholders. Assumptions were then applied to estimate the proportion of this expenditure retained within each study area.

By applying economic ratios and multipliers for the construction and manufacturing sectors, it was possible to estimate its economic impact. Therefore, the capital expenditure associated with the mills support:

- £0.2 million GVA and 5 jobs in the Outer Hebrides;
- £0.3 million GVA and 10 jobs in the Highlands and Islands; and
- £0.4 million GVA and 10 jobs in Scotland.

2.3 Mill Impacts Summary

In 2024, the mills generated £9.9 million GVA and 185 jobs in Scotland. Of this, £6.0 million GVA and 130 jobs were in the Outer Hebrides and £7.0 million GVA and 145 jobs were in the Highlands and Islands.

Table 2-1 Summary of Harris Tweed® Mill Impacts, 2024

	Outer Hebrides	Highlands and Islands	Scotland
GVA (£m)			
Direct Impact	£4.5	£4.5	£4.5
Staff Spending	£1.1	£1.5	£2.2
Supplier Spending	£0.1	£0.7	£2.8
Capital Spending	£0.2	£0.3	£0.4
Total GVA	£6.0	£7.0	£9.9
Employment			
Direct Impact	109	109	109
Staff Spending	15	20	35
Supplier Spending	<5	10	30
Capital Spending	5	10	10
Total Employment	130	145	185

Source: BIGGAR Economics Analysis. Totals may not sum due to rounding.



3.

Weavers

This section considers the socio-economic impact of weaving yarn into Harris Tweed®.

The process of weaving yarn into Harris Tweed® requires weavers to hand weave the warp and weft yarn using a manually operated loom to create the iconic cloth. Most weavers are self-employed and are contracted to produce cloth directly for the mills. A minority of weavers operate independently and produce their own cloth directly for customers.

This activity generates economic activity and supports employment in some of Scotland's most rural communities. This impact is generated through the direct impact of weaving, weavers spending the money they earn from weaving elsewhere in the economy, and buying the goods and services needed to complete the weaving process. The impact of this activity is considered below.

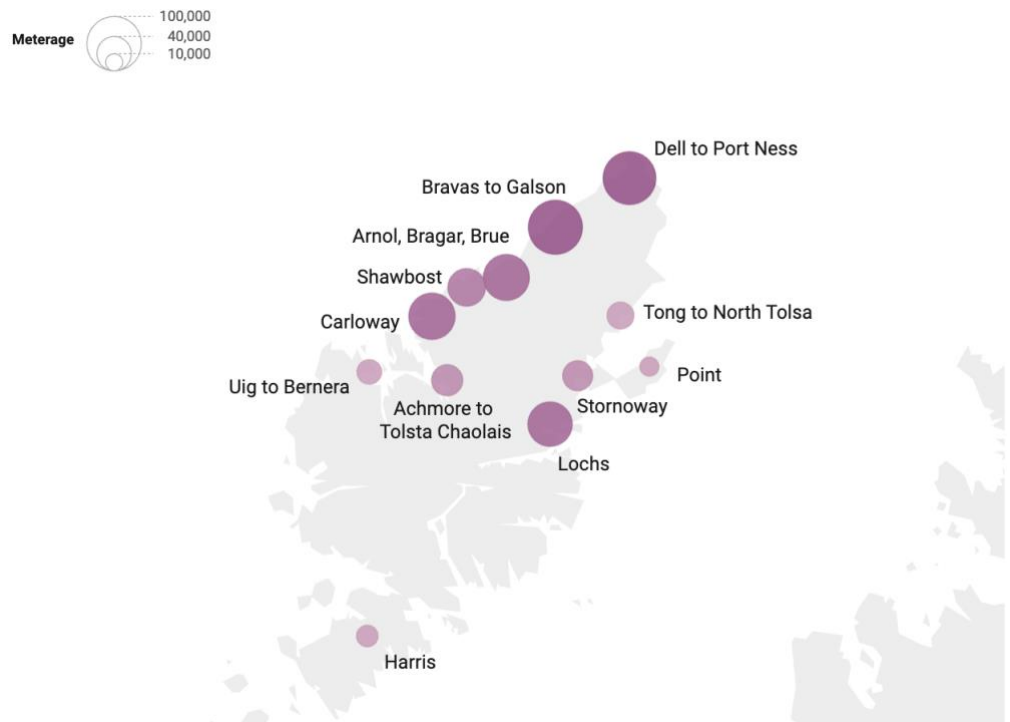
3.1 The Production of Harris Tweed®

Mostly working on a commission basis, weavers produce Harris Tweed® by weaving the warp and weft yarn received from the mills. As required by the Harris Tweed® Act of 1993, this process takes place within their homes in the Outer Hebrides.

Over the course of 2024, Harris Tweed® weavers across the Islands produced approximately 572,800 double width meters of Harris Tweed® fabric. As illustrated in Figure 3-1, almost 98% of this cloth was produced in Lewis, with weavers living in the areas of 'Bravas to Galson' and 'Dell to Port Ness' being the main producers.

Figure 3-1 illustrates just how important weaving is for sustaining employment opportunities in some of the most remote communities in the UK, enabling both individuals and families to remain living within these areas as well as continuing to generate wider economic benefits for the Outer Hebrides economy.

Figure 3-1 Meterage by Location



Source: BIGGAR Economic Analysis

3.2 Economic Impact

Using a mixture of data provided by the HTA, individual mills, and the online survey of weavers, the economic impact of this activity was estimated as follows.

3.2.1 Direct Impact

In 2024, there were 150 self-employed Harris Tweed® weavers contracted by the mills and 10 independent weavers. All the weavers are based in the Outer Hebrides.

Based on the average income and expenditure on supplies associated with weaving, collected through responses to the online survey of weavers it was possible to estimate the total direct GVA associated with the weavers, following the approach outlined in Section 2.2.1.

In this way, it was estimated the direct impact of Harris Tweed® weavers generated £3.0 million GVA and supported 160 jobs.

Whilst all weavers are required to live in the Outer Hebrides, income and supply chain expenditure supports wider economic activity to take place within the Highlands and Islands, and Scottish economies. The impact of this activity is outlined below.



3.2.2 Income Expenditure Impact

Following the same approach as outlined in Section 2.2.2, it was estimated that the impact of weavers spending their income in the Outer Hebrides', Highlands and Islands', and Scottish economies in 2024 generated:

- £0.8 million GVA and 10 jobs in the Outer Hebrides;
- £1.0 million GVA and 15 jobs in the Highlands and Islands; and
- £1.5 million GVA and 25 jobs in Scotland.

3.2.3 Supply Expenditure Impact

Based on responses to the online survey, it was estimated that weavers collectively spend around £0.3 million/year on supplies. This includes expenditure on loom parts, weaving equipment, utilities, and (for independent weavers) yarn and shipping costs.

To prevent double counting, the spending of independent weavers on yarn was subtracted from total expenditure as this is included within the impacts of the mills. Expenditure by study area was informed by information about the location of relevant suppliers (for example, the main supplier of loom parts is based in Northern Ireland) and household expenditure.

Following the approach outlined in Section 2.2.3, it was estimated that, through their expenditure on supplies within the Outer Hebrides, Highlands and Islands, and Scotland, weavers generate:

- <£0.1 million GVA and <5 jobs in the Outer Hebrides;
- <£0.1 million GVA and <5 jobs in the Highlands and Islands; and
- £0.1 million GVA and <5 jobs in Scotland.

3.3 Contribution to Cultural Identity

The Harris Tweed® industry is an important anchor for Gaelic culture, language and heritage. This is captured by the Gaelic concept of '*dualchas*' (sense of belonging) which relates to the heritage, culture, and deep connection between people and the land.

For weavers, their involvement in the process is far more than a job, and for residents of the Outer Hebrides, Harris Tweed® is far more than a product; it is an integral, living component of their cultural identity, heritage, and unique island way of life. The skills required for hand-weaving, understanding the looms, and blending the raw, dyed wool to achieve the iconic colours are generational skills passed down within families and communities. This transfer of tacit knowledge is a form of cultural capital. The entire production cycle, from the mills supplying the warp and weft yarn to the final inspection, requires continuous, close collaboration among the islanders, fostering a strong sense of community and shared purpose.



Responses collected by the online survey illustrate that for many, working with Harris Tweed® is a source of pride and an opportunity to continue the traditional craft and culture of the Outer Hebrides.

“I'm proud to help the continuation of a heritage craft.”

Source: Response gathered from BIGGAR Economics Online Survey

3.4 Challenges for the Future

For many years, weaving has been an important anchor for the cultural identity of Islanders and has helped to sustain some of the most rural communities in Scotland. However, the ageing profile of the weaving community presents a challenge for the future of the sector.

3.4.1 An Ageing Workforce

Based on the current weaving workforce, 73% of weavers are over the age of fifty and 46% over the age of sixty.

Nearly three-quarters of the current Harris Tweed® weaving community are over the age of fifty.

As illustrated in Figure 3-2, the current age distribution of the weaver workforce is significantly older than the composition of the workforce in the Outer Hebrides and Scotland as a whole. With more than half of the current weaving community aged between 50 and 69, the industry faces a significant challenge to its future sustainability.



Figure 3-2 Age Distribution of Weavers



Source: ONS (2025). Annual Population Survey – regional – labour market status by age. Scotland’s Census (2022). Economic Activity by sex by age.

3.4.2 Weaver Income

To address the threat of the ageing profile of the weaving community, the industry must attract new entrants. To do this, weaving must be perceived as an attractive career choice, with earning potential playing an important part in that perception.

Based on responses gathered in the online survey, the average weaver earned approximately £21,100 and spent around £1,750 on supplies on an annual basis, resulting in net income of approximately £19,350.

It should be noted that although presented as an average, the income of weavers varies significantly based on working hours, with some weavers working limitedly over a few months of the year, whilst others work on a more full-time basis. These diverse working patterns are reflected in the annual income reported across the weaving workforce, with the minimum reported to be £4,000 and a maximum of £35,000.

However, even the maximum income reported by weavers in the online survey is below the median annual income in the Outer Hebrides (£40,058). This disparity may reflect the traditional status of weaving as a component of a multi-income system, where money from weaving was used to supplement other sources of income from activity such as crofting. However, the volume of cloth produced in 2024, coupled with the number of active weavers suggests that this may no longer be the case. For many it seems that weaving is now a livelihood rather than a source of supplementary income.



This presents a challenge to the Harris Tweed® industry for two distinct reasons.

Whilst the online survey revealed some weavers enjoy the benefits of working from home and flexible hours, others mentioned long working hours, income fluctuations, and low wages. These factors could make weaving a less attractive career choice, making it more difficult to attract young people to replace the aging workforce.

The low wages received by weavers also presents a challenge for the Harris Tweed® brand, of which the foundations are built upon the idea of a locally produced, ethical, sustainable product that supports a traditional way of life and a high standard of living in the Outer Hebrides.

3.5 Weaver Impact Summary

In 2024, the Harris Tweed® weavers generated £4.5 million GVA and 185 jobs in Scotland. Of this, £3.8 million GVA and 170 jobs were in the Outer Hebrides and £4.0 million GVA and 175 jobs were in the Highlands and Islands.

Table 3-1 Weaver Impacts, 2024

	Outer Hebrides	Highlands and Islands	Scotland
GVA (£m)			
Direct Impact	£3.0	£3.0	£3.0
Income Spending	£0.8	£1.0	£1.5
Supplier Spending	<£0.1	<£0.1	£0.1
Total GVA	£3.8	£4.0	£4.5
Employment			
Direct Impact	160	160	160
Income Spending	10	15	25
Supplier Spending	<5	<5	<5
Total Employment	170	175	185

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.



4.

Harris Tweed Authority

This section considers the socio-economic impact of the Harris Tweed Authority.

The Harris Tweed Authority (HTA) is a statutory body, established by the Harris Tweed Act 1993 to safeguard and promote the Harris Tweed brand. The HTA funds its operations primarily through charges made to the mills for certifying the authenticity and quality of the cloth they produce and supplying Orb mark labels.

As a business the HTA generates direct a direct economic impact, as well as supporting economic activity through staff and supply chain expenditure.

However, the real value of HTA lies within its role in protecting the brand. The trademark adds value to the production process by guaranteeing demand, lowering transaction costs for consumers, and incentivising those working within the industry to continue to invest in machinery, equipment, and skills development.

4.1 The Process

Responsible for safeguarding the brand, HTA plays an important role in quality control and protects the name, mark and reputation of Harris Tweed®.



As part of the production process, finished cloth (alongside a signed declaration ensuring the production process was in accordance with the 1993 Act) is examined by an independent HTA inspector. Once the inspector is satisfied, a beeswax transfer of the Orb certification is ironed onto the cloth, and only thereafter, is the cloth recognised as genuine Harris Tweed®.

To further uphold the quality and recognition of products, in addition to displaying the Harris Tweed® Orb, HTA has required all makers of Harris Tweed® products to apply their own personal, permanent mark on their products. This ensures that both HTA and consumers can identify the maker or source of the item. This traceability allows HTA to archive details of any customer enquiries relating to a product or its maker, enabling HTA to better safeguard against poor quality products.

This vigilance ensures that only genuine products carry the brand's storied heritage and has been essential in maintaining the brand's value and reputation. It also ensures that customers worldwide can trust the name as a mark of quality and authenticity. HTA's role in maintaining the value of the cloth also helps to provide a secure future for the Islanders whose livelihoods depend on it.



These core operations of HTA generate a direct economic impact as well as supporting wider economic activity through wage and supply chain expenditure. These impacts are quantified below.

4.2 Economic Impact

4.2.1 Direct Impact

In 2024, HTA generated total turnover of £0.6 million and spent £0.4 million on goods and services. It also employed four full time staff, two part time staff members, one seasonal staff member and contracted one self-employed worker.

Following the approach outlined in Section 2.2.1, the direct GVA of the Authority in 2024 was therefore estimated to be £0.2 million GVA and almost 10 jobs.

4.2.2 Staff Expenditure

In 2024, the Authority's staff costs amounted to £0.2 million. As with mill workers and weavers, when HTA staff spend their wages in the economy this generates an economic impact.

Following the approach outlined in Section 2.2.2, the impact of this expenditure was estimated to be:

- £0.1 million GVA and <5 jobs in the Outer Hebrides;
- £0.1 million GVA and <5 jobs in the Highlands and Islands; and
- £0.1 million GVA and <5 jobs in Scotland.

4.2.3 Supply Expenditure

HTA also generates impact by buying goods and services.

Based on expenditure data provided by HTA, the Authority spent £0.4 million on supplies in 2024, of which 13% went to companies in the Outer Hebrides, 14% to those based in the Highlands and Islands, and 65% to companies based in Scotland.

Following the approach outlined in Section 2.2.3, the impact of impact of this supply chain expenditure generated:

- <£0.1 million GVA and <5 jobs in the Outer Hebrides;
- <£0.1 million GVA and <5 jobs in the Highlands and Islands; and
- £0.3 million GVA and 5 jobs in Scotland.

However, these effects are only a fraction of the value added by HTA, most of which relate to the role the Authority plays in protecting the Harris Tweed® brand.

4.3 The Wider Value of the Orb

Regulated by HTA, the Orb certification found on Harris Tweed® clothes and products, indicates that the goods or services being offered comply with the legal definition of Harris Tweed® and a certain set of standards, acting as stamp of quality



and protecting the brand against infringements and counterfeits. The reputational impact that this trademarking has had on the Harris Tweed® brand has been invaluable and has driven the cloth's global identity and appeal.

4.3.1 Lowering Transaction Costs

One way in which the certification of Harris Tweed® cloth supports economic activity is that it lowers transaction costs for consumers. When purchasing a product, consumers not only just consider the monetary cost of the product, but also the other costs of acquiring a product. As a scarce resource, time spent on the purchase process is often a significant consideration for consumers.

Figure 4-1 Calculating Total Cost

$$\text{Total Cost} = \text{Monetary Cost} + (\text{Time Spent} \times \text{Value of Time})$$

The Orb signifies quality and authenticity, increasing consumer trust and confidence in a product, reducing the need for consumers to search for alternatives and therefore, the overall time spent looking for the product. 'Saving' time in this way means that consumers are often willing to pay a higher monetary price for the product, generating greater financial returns for Harris Tweed® industry.

4.3.2 Incentivising Investment

For those working in the production process, the certification of Harris Tweed® products also incentivises investment. As a protected trademark, the Orb signifies a premium quality and carries significant value, justifying a premium price. This allows producers of Harris Tweed® to benefit from the value of the brand's global reputation, encouraging producers to continue investing in the cloth's production.

The brand's strong reputation is reflected within the responses gathered in an online survey, with many of the artisans registered with HTA reporting that working with fabric provided them with a sense of pride, with others reporting that the brand was synonymous with quality, heritage and tradition. Figure 4-2 represents the most frequent responses from HTA registered artisans when asked what Harris Tweed® means to them.



Figure 4-2 Artisan Responses



Source: BIGGAR Economics survey results.

The trademarking of the Orb also protects the brand against infringements and counterfeits which could otherwise lead to the manufacturing quality of Harris Tweed® products being compromised to drive down prices. Thanks to the Orb and HTA regulation, any investment in the industry benefits those who uphold the quality of the brand, excluding counterfeit producers from free-riding.

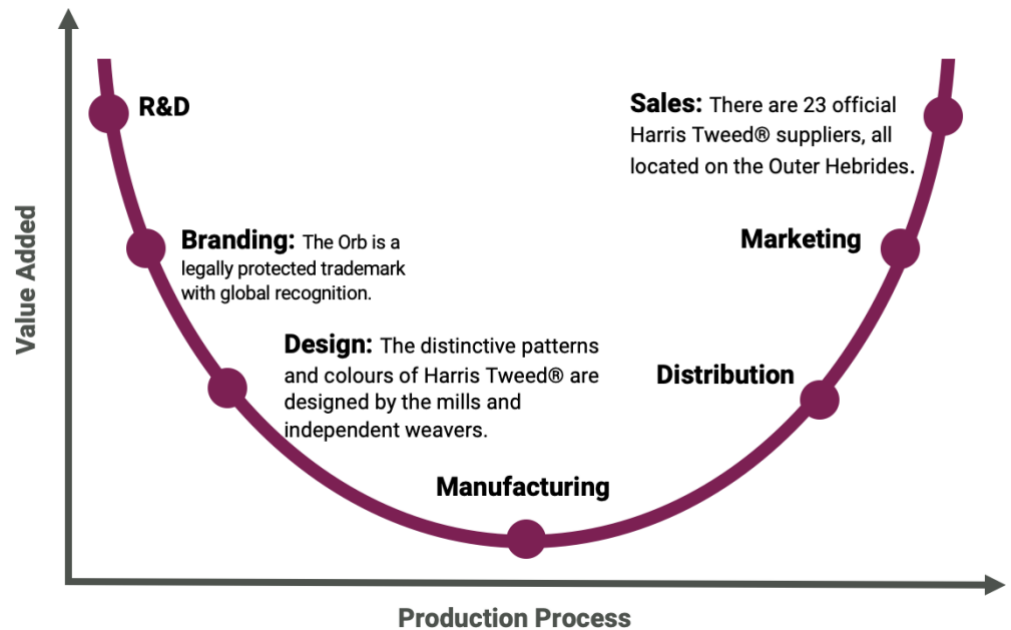
4.4 Production Process

The role of the Authority and the legal requirements associated with the production of Harris Tweed® cloth also ensures that those in each stage of the production chain can benefit from the brand's value.

The Smile Curve (often attributed to the founder of Acer Inc. Stan Shih), illustrated in Figure 4-3, provides a convenient way of conceptualising this. The core insight this framework provides is that activities that typically add the greatest value, and retain the greatest profits, tend to happen at the beginning and the end of the curve.

Generally, manufacturing, captures less of this value and those involved in the manufacturing stage are often poorly compensated. This is because large global retailers and fashion brands are often in control of the market and are incentivised to offshore manufacturing to parts of the world where labour costs are lower.

Figure 4-3 Smile Curve



Source: Adapted by BIGGAR Economics based on Stan Shih (2010). Me-Too Is not My Style.

The presence of HTA and the Orb has provided manufacturers with control over the brand, preventing the manufacturing process from being commoditised and offshored. This has ensured that those responsible for production retain control over the higher value activities at either end of the production process.

The legal requirements in the Harris Tweed Act 1993 also ensure that home weaving and mill-based production processes are maintained in the Outer Hebrides, and therefore that the value of this activity is retained on the Islands. This traditional production process is what continues to underpin the brand's identity and authenticity.

4.5 Summary of Harris Tweed Authority Impacts

In 2024, HTA generated £0.6 million GVA and 15 jobs in Scotland. Of this, £0.3 million and 10 jobs were in the Outer Hebrides, and £0.3 million and 10 jobs were in the Highlands and Islands.



Table 4-1 Harris Tweed Authority Impacts, 2024

	Outer Hebrides	Highlands and Islands	Scotland
GVA (£m)			
Direct Impact	£0.2	£0.2	£0.2
Staff Spending	<£0.1	<£0.1	£0.3
Supplier Spending	£0.1	£0.1	£0.1
Total GVA	£0.3	£0.3	£0.6
Employment			
Direct Impact	8	8	8
Income Spending	<5	<5	5
Supplier Spending	<5	<5	<5
Total Employment	10	10	15

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.



5.

Artisans

This section considers the socio-economic impact of artisans creating finished articles from Harris Tweed® fabric for sale to consumers.

Artisans add value to the production process by transforming the Harris Tweed® cloth into a diverse range of products for consumer purchase, including clothing, furniture, and accessories. Whilst this process is not concentrated purely in the Outer Hebrides, a portion of this activity is retained in the Islands, the Highlands and Islands, and Scotland as a whole, generating economic activity and supporting employment. The impact of this activity is considered below.

5.1 The Process

As the Harris Tweed® industry continues to grow, the range of products the cloth is used for has expanded significantly, appealing to a wider global market. Increasingly, Harris Tweed® cloth is being used to create a huge range of bespoke and unique items, including teddy bears, ornaments and decorations, of which a sample are illustrated in Figure 5-1.

Whilst wider trends across the textile and manufacturing industries have led to many items, such as accessories, being commissioned, offshored, and imported, the rise in artisan⁵ production and the presence of HTA has cultivated an environment for smaller businesses to produce bespoke items using traditional processes.

By doing so, artisans have played an important role in retaining a proportion of the economic impact associated with creating Harris Tweed® products, within Scotland and preserving the brand's reputation and recognised quality.

Whilst only a limited number of artisans provided information on their annual earnings, the online survey highlighted the importance of Harris Tweed® on artisan income and livelihood, with 55% of artisans reporting that more than half of their income was generated through the Harris Tweed® products they produce. A quarter of respondents also reported that being unable to use Harris Tweed® fabric in their products would create a challenge for their household income.

More than half of the artisans surveyed earn more than half their income from Harris Tweed®.

⁵ Defined as a worker in a skilled trade, often involving making things by hand.



Figure 5-1 Sample of Harris Tweed® Accessories



Source: TheNuthatchShop



Source: House of Bruar



Source: LBeeUK



Source: Harris Tweed Scotland



Source: Harris Tweed Shop



Source: buttonboo



Source: Harris Tweed Scotland



Source: RosesWorkshop



5.2 Economic Impact

5.2.1 Direct Impact of Artisans

In 2024, there were 135 artisans and independent producers working with Harris Tweed® including 25 in the Outer Hebrides and a further 66 elsewhere in Scotland.

Following the approach outlined in Section 2.2.1 using data gathered from the online survey, it was estimated that the direct impact of the artisans working with Harris Tweed® in 2024 was:

- £0.1 million GVA and 25 jobs in the Outer Hebrides;
- £0.1 million GVA and 25 jobs in the Highlands and Islands; and
- £0.5 million GVA and 91 jobs in Scotland.

5.2.2 Artisan Income Expenditure Impact

Based on survey data, it was also possible to estimate the impact of the impact expenditure of artisans, following the approach outlined in 2.2.2.

In this way, it was estimated that spending by artisans generated:

- <£0.1 million GVA and <5 jobs in the Outer Hebrides;
- £0.1 million GVA and <5 jobs in the Highlands and Islands; and
- £0.1 million GVA and 5 jobs in Scotland.

5.2.3 Artisan Supply Expenditure Impact

Using data from the survey, it was possible to estimate the impact of the supply chain expenditure of artisans. Spending on Harris Tweed® and labels and certification provided by the HTA was excluded from this to prevent double counting.

Following the approach outlined in Section 2.2.3, it was estimated that through their expenditure on supplies, artisans generate:

- <£0.1 million GVA and <5 jobs in the Outer Hebrides;
- <£0.1 million GVA and <5 jobs in the Highlands and Islands; and
- £0.1 million GVA and 5 jobs in Scotland.

5.3 Retaining Greater Impact

Unlike the weavers, artisans working with Harris Tweed® are not required to live in the Outer Hebrides and data provided by HTA suggests that only 7% reside on the Islands. Whilst most artisans are located elsewhere in the UK (approximately 80%), others are based further afield, including Australia, Canada and the USA.

Whilst this widespread network of global artisans illustrates the international appeal of the brand, it also highlights a significant economic opportunity. Localising a greater number of these artisans to the Outer Hebrides would enable the region to retain a significantly larger share of the economic impact generated by this activity.



5.4 Summary of Impact

In 2024, artisans generated £0.8 million GVA and supported 95 jobs in Scotland. This included £0.2 million and 25 jobs in the Outer Hebrides.

Table 5-1 Artisans Impact, 2024

	Outer Hebrides	Highlands and Islands	Scotland
GVA (£m)			
Direct Impact	£0.1	£0.1	£0.5
Income Spending	<£0.1	£0.1	£0.2
Supplier Spending	<£0.1	<£0.1	£0.1
Total GVA	£0.2	£0.2	£0.8
Employment			
Direct Impact	25	25	91
Income Spending	<5	<5	5
Supplier Spending	<5	<5	5
Total Employment	25	25	95

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.



6. Contribution to Tourism

This section considers the contribution of Harris Tweed® to tourism in the Outer Hebrides.

There are several distinct ways that Harris Tweed® contributes to the tourism industry in the Outer Hebrides. Beyond the brand's global recognition and cultural identity, which enriches the offering of the Outer Hebrides as a tourism destination, Harris Tweed® also encourages visitor expenditure by providing distinctive souvenirs for tourists to purchase and experiences to engage with during their trip.

This expenditure supports economic activity within the Outer Hebrides and supports employment. The impact of this expenditure is estimated below.

6.1 Drivers of Tourism

The latest Outer Hebrides Visitor Data Report estimated that more than 333,500 people visited the Outer Hebrides in 2024, generating approximately £81.5 million for the local economy⁶. Research⁷ shows that for visitors to the Outer Hebrides, their primary motivations for visiting Scotland was the scenery and landscape (86%) and the history and culture (56%).

Based on these survey findings, it could be suggested that these factors were the driver of between £45.6 million to £69.3 million of the annual visitor expenditure in the Outer Hebrides.

Harris Tweed® embodies these key drivers of tourism: the colours, patterns and texture of Harris Tweed® directly and deliberately inspired by the rugged landscape and wild nature of the Outer Hebrides, and deep connection the fabric has to the Islands' cultural heritage.

As a cultural cornerstone of the Outer Hebrides, the Gaelic language is deeply intertwined with the production of Harris Tweed®. Known among Islanders as *Clo Mor* – Gaelic for 'the Big Cloth' – the fabric has a strong connection to its historical roots, with production traditionally accompanied by the singing of Gaelic songs⁸. Today, the language continues to be widely spoken in the Outer Hebrides and remains an important influence on the brand.

The cultural value of Harris Tweed® was internationally recognised in 2018 when the Outer Hebrides was designated a World Craft Region. This is a designation given by the World Crafts Council (WCC) to recognise a location for its exceptional craft heritage, strong artisan community, and commitment to future development. The

⁶ Visit Outer Hebrides et al. (2025). Outer Hebrides – Visitor Data Report 2025.

⁷ Scotland Visitor Survey (2023). Outer Hebrides Factsheet.

⁸ Merchant & Makers (2015). Harris Tweed: 'The Big Cloth'.



Outer Hebrides became the first region to be awarded this status in the UK and is only one of five regions in Europe with this designation.

As a symbol of both the Outer Hebrides' scenery and landscape, and its history and culture, Harris Tweed® is an important contributor to the tourism economy and enriches the wider offering of the Outer Hebrides as a tourism destination appealing to visitors across the world.

6.2 Harris Tweed® as a Tourist Asset

Offering visitors an insight into the fabric's history and showcasing the production process, Harris Tweed® offers a unique experience for visitors. For the tourism economy this is increasingly important as visitors are moving away from passive sightseeing and towards active, meaningful, and authentic engagement with the places they visit⁹. This trend, known as experiential tourism or cultural immersion, helps foster personal growth and a deeper understanding of the local community.

Experiences offered by the Harris Tweed® industry, including meeting the people involved in production, learning about the history of the fabric, and participating in meaningful interactions such as weaving workshops, provide visitors with an understanding of the Islands' way of life, which Harris Tweed® is a part of. When visitors take part in these experiences it helps them connect with the Islands, making them more likely to share their experiences, make a return visit, or even consider relocating permanently¹⁰, all of which add to the Outer Hebrides' economy.

“Harris Tweed® has everything – the heritage and story about how the Islands worked, engagement with the current industry and a product people can take away. It is unique. We have other arts and crafts, and food experiences, but nothing that offers such a complete experience.”

Source: Outer Hebrides Tourism

6.2.1 The Harris Tweed® Story Room

Operated by HTA, the Harris Tweed® Story Room provides an immersive experience for visitors to engage with Harris Tweed®, by introducing the history and heritage of the iconic industry and showcasing the production process.

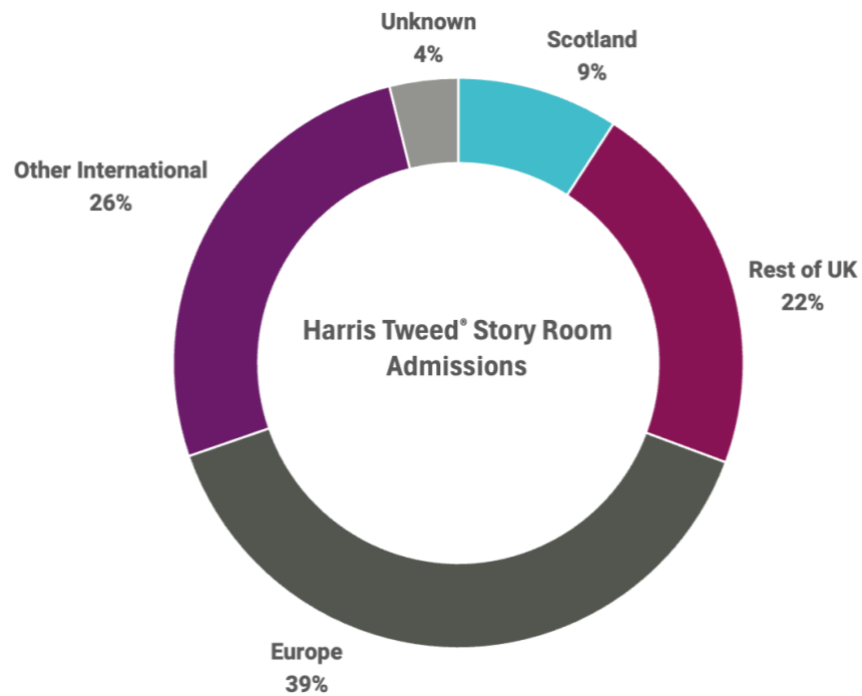
⁹ Ishani Sharma et al., January 2025. Creative tourism: reviewing the past and charting the future

¹⁰ Pooley K., August 2025. From visitors to locals: how leisure tourism can build long-term love & loyalty for your destination



The Story Room welcomes visitors from around the world, with 39% of visitors over 2024 and 2025 reporting that they were visiting from Europe and a further 26% from elsewhere internationally, as illustrated in Figure 6-1.

Figure 6-1 Harris Tweed® Story Room Admissions by Location



Source: BiGGAR Economic Analysis of Harris Tweed® Story Room data.

Data collected from the Story Room also found that approximately 10% of those who asked were visiting the Outer Hebrides because of their interest in textiles with the specific purpose of engaging with and learning about Harris Tweed®.

In absolute terms, the number of visitors involved means that this impact will not be small, but the figures show Harris Tweed® is an important draw for some.

For most visitors Harris Tweed® is part of the overall cultural/historical visitor proposition of the Islands. Something that enhances and adds value to a wider experience. However, the figures show there is a small number of visitors for whom the fabric and its story is a major factor in their decision to visit the Islands.

6.3 Impact of Approved Suppliers

An online survey of artisans revealed that, apart from the festive season, sales are often highest during the summer months because of visitors to the Outer Hebrides purchasing these products. Many of these sales are likely to be purchases at one of the 23 approved Harris Tweed® suppliers, all of which are in the Outer Hebrides.



Based on data provided by the largest approved supplier, and label sales collected by HTA, it was possible to calculate an employment-to-fabric ratio. This ratio was then applied to the remaining approved suppliers¹¹ to estimate direct employment.

Following this approach, it was estimated that the approved suppliers supported approximately 25 direct jobs in the Outer Hebrides, with the consultation programme suggesting a further four were employed within the Highlands and Islands. GVA per job ratios were then applied to estimate direct GVA by study area.

In addition to direct economic impact, wider impacts were also estimated to reflect the impact of supply chain and wage expenditure associated with each of these businesses, following the approach outlined in Sections 2.2.2 and 2.2.3.

It was therefore estimated that the economic impact of the approved suppliers was:

- £0.7 million GVA and 30 jobs in the Outer Hebrides;
- £0.9 million GVA and 35 jobs in the Highlands and Islands;
- £1.0 million GVA and 35 jobs in Scotland.

6.4 Summary of Impact

In 2024, tourism expenditure attributed to Harris Tweed® and approved suppliers generated £1.0 million GVA and 35 jobs in Scotland, including £0.7 million and 30 jobs were in the Outer Hebrides. However, this impact is only a small proportion of the contribution Harris Tweed® makes to the Islands tourism industry.

By far the most important contribution Harris Tweed® makes to Outer Hebrides tourism through the brand’s global reach. Harris Tweed® brings the Islands to an international audience and reinforces the appeal of the Outer Hebrides’ tourism proposition, providing an authentic link to the cultural heritage and landscape of the Islands, both of which are recognised as the key drivers of tourism to the region.

As a result, most of the value Harris Tweed® generates for the Outer Hebrides’ tourism economy cannot be quantified, and therefore the numbers presented in Table 6-1 are almost certainly an underestimate.

Table 6-1 Tourism and Approved Suppliers Impact, 2024

	Outer Hebrides	Highlands and Islands	Scotland
GVA (£m) - Approved Suppliers	£0.7	£0.9	£1.0
Employment - Approved Suppliers	30	35	35

Source: BIGGAR Economics Analysis. Totals may not sum due to rounding.

¹¹ To prevent double counting Mill shops were excluded from this impact.



7. Population Retention

By generating economic activity and supporting employment opportunities in the Outer Hebrides, Harris Tweed® makes an important contribution to population retention on the Islands.

The jobs supported throughout the production process of Harris Tweed® alongside the brand's contribution to tourism expenditure, makes an important contribution to the Outer Hebrides economy. Against a backdrop of an ageing and declining population, these jobs are critical for sustaining the population in some of the most remote communities in Scotland.

7.1 Population Retention

In a region often described as economically fragile, Harris Tweed® has long offered local employment helping to anchor the working-age population in the Outer Hebrides and contribute to population retention¹². The total direct workforce in the Outer Hebrides includes approximately:

- 160 weavers (including self-employed weavers and independent producers/weavers) registered with the Harris Tweed® Authority;
- 25 artisans; and
- 110 people employed at the mills.

Collectively, this represents 2% of the total employment in the Outer Hebrides¹³.

Figure 7-1 below shows that since the turn of the century, the overall population of the Outer Hebrides has fallen by 2.9%, yet this masks a rapidly increasing growth of those over 65 (37%) and a considerable fall in the number of children (26%). This trend is expected to continue with the Outer Hebrides projected to lose almost a quarter of its working age population (24%) between 2022 and 2043¹⁴.

There are several factors driving population decline and migration from rural areas, such as those experienced in the Outer Hebrides. Young people and families often leave rural areas in pursuit of employment opportunities, affordable housing, and greater access to shops, schools, services, and social networks¹⁵. In contrast, older people often return to or remain in rural areas such as the Outer Hebrides, valuing

¹² Nascimento, J. (2020). [Working the fabric: resourcefulness, belonging and island life in the Harris Tweed industry of the Outer Hebrides of Scotland](#)

¹³ ONS (2025). Business Registers and Employment Survey, 2024.

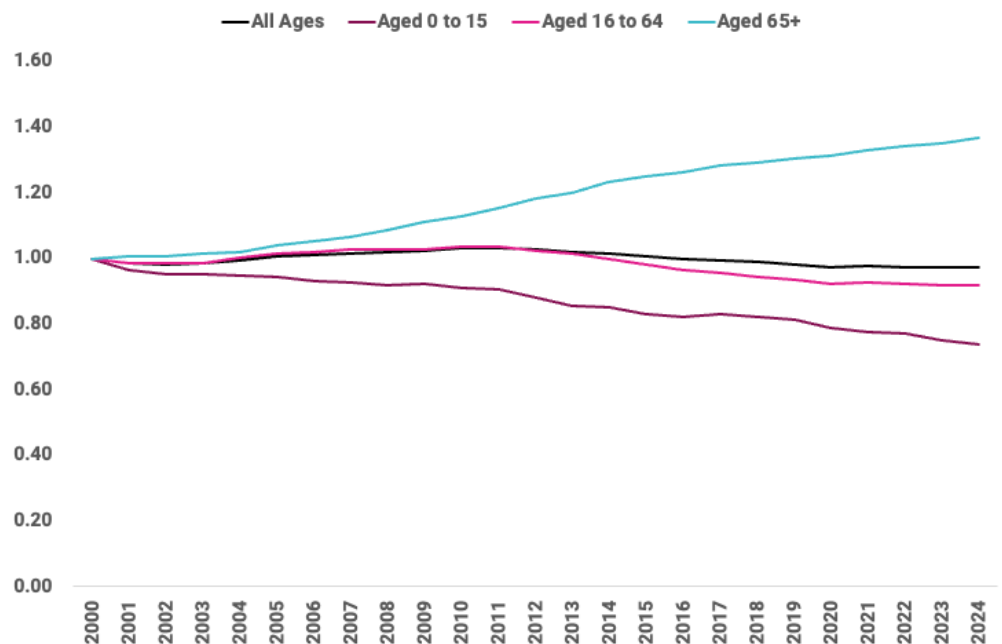
¹⁴ BiGGAR Economics Report to the Crofting Commission (September 2024). [The Value of Crofting](#)

¹⁵ Scottish Government (2010). Factors Influencing Rural Migration Decisions in Scotland: An Analysis of the Evidence.



the local environment and community to a greater extent than factors such as job availability. These push and pull factors are continuing to shape many rural areas in Scotland, including the Outer Hebrides, and result in declining and ageing demographic trends.

Figure 7-1 Change in the Outer Hebrides Population Structure (2000 - 2024)



Source: ONS (2025). Population estimates – local authority based by single year of age.

Whilst these wider trends create a challenge for the industry, the 1993 Harris Tweed Act requires the cloth to be dyed, spun, handwoven, and finished on the Outer Hebrides. This requirement anchors many of those working in industry to the Island, where they generate economic activity and help maintain the working-age population in rural communities in the Outer Hebrides.

Encouraging younger people to engage with Harris Tweed®, could help create new opportunities for meaningful employment that could encourage more younger people to live and work on the Island, helping counter depopulation.

7.2 Supporting Crofting

The legislative requirements governing Harris Tweed® require weavers to live on the Islands and for mill-based process such as yarn production and finishing to take place on the Outer Hebrides. This is similar to the legislative requirements governing crofting, which include a duty for crofters to be ordinarily resident on or within 32km of their croft. This duty of residency helps provide the stable, distributed workforce necessary for the Harris Tweed® industry to operate. This is not happenstance.

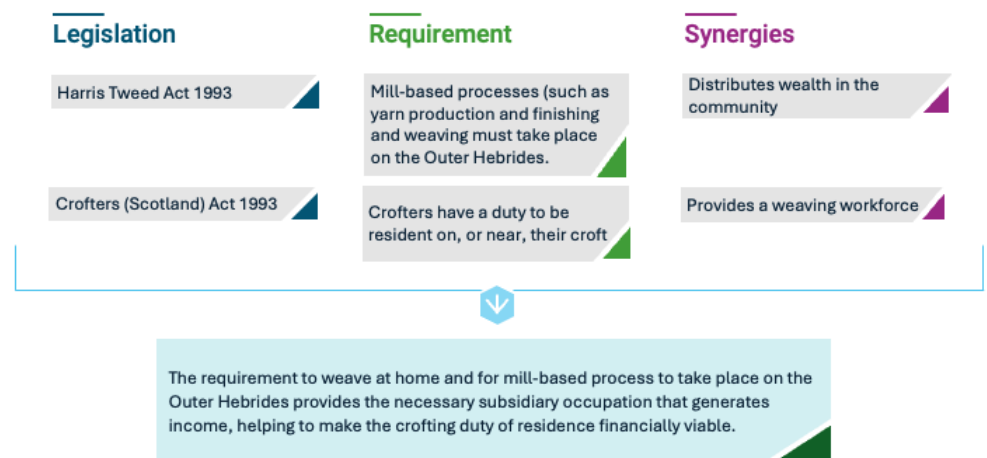


The origins of the commercial Harris Tweed® industry in the mid-19th century were directly tied to encouraging local crofters to produce a durable woollen cloth (*Clò-Mòr* or 'The Big Cloth') to help them earn a living. The legislation is still relevant today because it ensures a resident population remains on the Islands, providing the pool of labour needed to fulfil the home-weaving mandate enshrined in the 1993 Act.

Symbiotically, Harris Tweed® supports crofting by providing weavers with flexible hours and a supplementary income that traditionally contributes to the household finances of crofters, allowing them to balance the duties of tending livestock and crops with the demands of commercial weaving. Working the croft alongside other occupations is not only practical but the combination of activities enables a crofting lifestyle to be financially viable.

As illustrated in Figure 7-2, the intersection of these legislative requirements, creates a unique socio-economic model that helps to sustain communities in the Outer Hebrides.

Figure 7-2 Mutually Supportive Synergies between Harris Tweed® and Crofting



Source: BiGGAR Economics

Having both weavers and those working in the mills, and crofters securely embedded in the Outer Hebrides, improves the overall resilience of the working population in the region, helping to ensure the survival of what would otherwise be very fragile communities.



8. The Future of Harris Tweed®

This section considers the future challenges for the industry and identifies opportunities to capitalise on its unique protected status.

Whilst the Harris Tweed® industry has grown in both production and popularity, the demographic profile of the workforce presents an important challenge to the sustainability of the brand, necessitating action to attract new entrants.

There is also an important opportunity for Harris Tweed® to ensure those involved in the production process reap more rewards from doing so, by focusing on high value added activities including:

- investing in technology and skills (R&D);
- leveraging ethical and social integrity (marketing); and
- opportunities for tourism (marketing).

These challenges and opportunities are explored below.

8.1 The Challenge of Attracting New Entrants

With less than 2% of the current weaving community under the age of thirty, many within the industry recognise the need to instil and develop the skills and knowledge required to produce Harris Tweed® within the younger generation to ensure the longevity of the craft.

8.1.1 Training Opportunities

Whilst the craft of weaving has traditionally been passed down through generations, responses to the online survey revealed that a third of the current workforce have no plans to continue the transfer of their skills in this way, presenting a risk to the longevity of the sector.

Whilst the sector is actively recruiting across the local community and seeking to attract school-leavers, graduates, and skilled workers to weaving and the mills, a more active and formalised knowledge transfer may be required to ensure that these skills do not disappear from the Outer Hebrides workforce. One way of doing this would be to develop an apprenticeship programme or a specific training course in weaving, dyeing, spinning, and other traditional textile skills.

Beyond these traditional textile skills, a variety of other skills and disciplines including sales, finance, marketing, legal, and design, are also vital to the Harris Tweed® production process and required within the mills, creating a variety of career options for young people within the industry. One mill also highlighted an opportunity



for collaboration with the local council to support young people into local employment and encourage entry into the industry.

8.1.2 Career Prospects

The other key component to ensure the long-term sustainability of the Harris Tweed® industry is to ensure young people see weaving as an appealing career choice. Weaving presents workers with the benefits of working from home and flexible hours, factors which often appeal to the younger generation.

However, the traditional flexible income model that worked well as part of multi-income crofting system may have different connotations within the more modern context of the gig economy and zero-hours contracts. Ensuring a clear distinction between the two is likely to become a challenge for the industry.

Based on the findings of this study, the average GVA per head generated by Harris Tweed® manufacturing (mills and weavers) was approximately £27,900. This is significantly lower than the average across the wider textile sector, where the GVA per job associated with the 'Manufacture of Textiles, Wearing Apparel and Leather Products' is equivalent to £47,600 in 2025 prices^{16 17}.

This may in part be attributable to a high proportion of the weavers working part-time, but could also be an indicator of relatively lower wages. Evidence gathered through the survey of weavers supports this, suggesting weavers earn an average of around £19,350/year, significantly less than the average for the Outer Hebrides

To ensure that the production of Harris Tweed® continues to be an attractive career choice, it is important wages are competitive. To uphold the foundations of the brand as an industry that supports a traditional way of life and a high standard of living in the Outer Hebrides, it is also important they are seen as fair. Weaver remuneration is therefore likely to be an important future challenge for the industry.

One way of addressing this challenge would be to develop new areas of activity that enable more of the value associated with Harris Tweed® to be retained on the Outer Hebrides and by the people involved in producing the cloth.

8.2 Opportunities to Retain Greater Value

Taking a collaborative approach across the mills, weavers, and HTA to focus on the stages of production at either end of the Smile Curve (Section 4.4) could further enhance the value of the Harris Tweed® production process and help the Outer Hebrides to retain a greater share of this value.

Activities associated with R&D, sales, and marketing, can improve the profitability and value retention of the brand. As such, developing the skills to undertake these

¹⁶ Scottish Government (2025), Scottish Annual Business Statistics 2023

¹⁷ ONS (2025), CPIH Annual Rate 00: ALL ITEMS 2015=100



activities could support higher productivity jobs and ensure financial benefits are retained on the Island, helping to sustain local communities.

8.2.1 R&D: Investing in Technology and Skills

The most pressing challenge identified by the mills is maintaining their complex, specialised equipment, a process that requires imported bespoke parts and, often, engineers to be brought in from the mainland. Developing the skills and equipment needed for this activity to be undertaken on the Outer Hebrides, could help enable the Islands to retain more value from the industry.

There is a significant opportunity for the industry to **develop the necessary skills** required to do this. Working collaboratively with local engineering companies could foster the development of tailored maintenance services for mill machinery and weavers' looms, ensuring a faster repair turnaround whilst simultaneously supporting employment on the Islands.

A longer-term strategy to develop these skills could involve working with local colleges to integrate textile machinery maintenance into their existing programmes, or establishing formal apprenticeships in partnership with the mills, focused on the unique mechanics of Harris Tweed® equipment. Such initiatives could be mutually beneficial, by developing a local talent pool specialising in Harris Tweed® equipment and supporting employment opportunities for engineers on the Island, whilst simultaneously reducing the costs and disruptions to the production process.

Another suggestion made by consultees was to invest in establishing a centralised hub in the Islands, equipped with **3D printing capabilities and metalworking machinery** to produce specialised parts for both the mills and the weavers' looms.

A hub of this nature could generate income and reduce costs for both the mills and weavers by reducing the cost of importing equipment and parts, and ensuring the financial benefit of doing so is retained within local businesses.

8.2.2 Marketing: Leveraging Ethical and Social Integrity

Another key opportunity for Harris Tweed® is to leverage the brand's ethical and social integrity to support engagement and relevance with the younger generation.

In a global market increasingly concerned with ethical sourcing and environmental impact, Harris Tweed® has an unmatched story to tell. Positioning the cloth as the ultimate "**slow luxury**" textile - a durable, repairable, low-impact, 100% pure wool product - contrasts sharply with the ethics of fast fashion. This narrative enhances its cultural value as a product born of resourcefulness and respect for the environment. This provides an opportunity for the industry to leverage this inherent competitive advantage, appealing to a wide range of consumers and those concerned with sustainability.

As a direct reflection of the colours and textures seen on the Outer Hebrides, Harris Tweed® also acts as an **archive of environmental change**, showcasing the different seasons and longer-term changes to the landscapes and scenery on the Islands.



Showcasing samples of the Harris Tweed® over time or creating a Woven Climate Map as suggested by anthropological research¹⁸, offers an opportunity to emphasise the changes to the unique Hebridean ecosystem and advocate for its preservation.

The unique relationship between Harris Tweed® and the Outer Hebrides landscapes provides an opportunity for the brand to engage with the younger generation and contribute to the narrative around climate change.

8.2.3 Marketing: Opportunities for Tourism

As a globally recognised brand and an important contributor of the current tourism economy in the Outer Hebrides, Harris Tweed® is well-placed to capitalise on the growing footfall of cruise ship passengers docking in Stornoway.

To grow Harris Tweed® related tourism across the Outer Hebrides, HTA has piloted a **Harris Tweed® Trail** that maps out visitor centres, shops, and weavers across the Islands, creating an interactive way for visitors to connect the brand with its cultural heritage and geographic roots. The Trail provides an opportunity to encourage tourism across the Islands, supporting local spending from visitors whilst showcasing the heritage of Harris Tweed® and its roots in the Outer Hebrides.

The growing footfall of cruise ship passengers provides an opportunity for Harris Tweed® to engage with a larger number of visitors and engage with communities by hosting **events and festivals**.

A successful one-off Harris Tweed® Festival Day was held in 2016 and demonstrated strong engagement from both visitors and locals. This success suggests that reintroducing a dedicated annual Harris Tweed® event, potentially integrated with major regional events like the 2027 Mòd, could significantly enhance the Islands' festival offering and maximise visitor numbers.

The Harris Tweed® could also capitalise on the growing popularity of "Tweed Runs" that are held in major cities such as London¹⁹. Launching an official annual Harris Tweed® Cycle Event along the Hebridean Way, could promote the fabric in an active, contemporary context and drive niche tourism during the shoulder season.

8.3 Summary of Challenges and Opportunities

The Harris Tweed® industry faces both challenges and opportunities. How it responds to these will be critical to its future success.

This chapter has considered the key challenge of attracting new entrants to the industry to ensure the skills and knowledge currently existing within the production process are passed down to the younger generation.

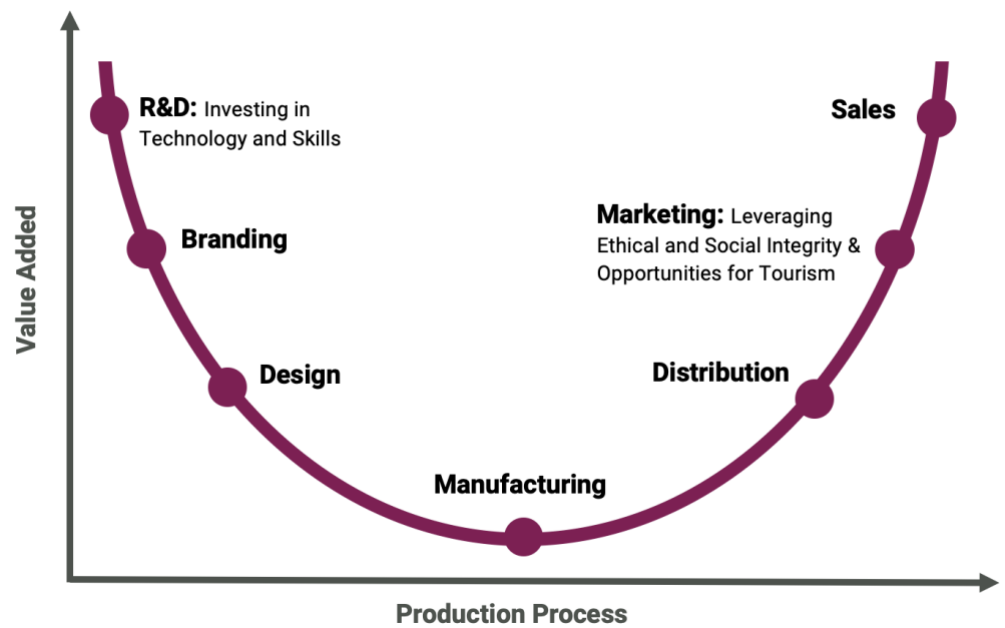
¹⁸ Chittenden T., May 2025. [Weaving Climate: Harris Tweed as a Living Map of Environmental Change](#)

¹⁹ <https://www.bbc.co.uk/news/uk-england-london-68900476>



To address this challenge and to ensure those involved in the production process reap more rewards from doing so, there is a key opportunity for the industry to capture more of the value generated by the activities tangential to the manufacturing process. Following this approach, three main ways of doing so were identified, including R&D/technological investment, leveraging the ethical and social integrity of the brand, and exploiting tourism-related activities.

Figure 8-1 Smile Curve: Future Opportunities



Source: Adapted by BiGGAR Economics based on Stan Shih (2010). Me-Too Is not My Style.



9.

Summary and Conclusions

Embodying Hebridean culture and supporting meaningful employment in Scotland’s most remote communities, Harris Tweed® has the potential to generate even more value for the Islands.

9.1 The Economic Contribution of Harris Tweed®

In 2024, Harris Tweed® generated:

- £16.8 million GVA and supported 520 jobs across Scotland, of which;
- £12.5 million GVA and 395 jobs were in the Highlands and Islands; and
- £11.0 million GVA and 370 jobs were in the Outer Hebrides.

A breakdown of this impact is provided in Table 9-1.

Table 9-1 Harris Tweed® Total GVA and Employment Impacts, 2024

	Outer Hebrides	Highlands and Islands	Scotland
GVA (£m)			
Mills	£6.0	£7.0	£9.9
Weavers	£3.8	£4.0	£4.5
HTA	£0.3	£0.3	£0.6
Artisans	£0.2	£0.2	£0.8
Approved Suppliers	£0.7	£0.9	£1.0
Total	£11.0	£12.5	£16.8
Employment			
Mills	130	145	185
Weavers	170	175	185
HTA	10	10	15
Artisans	25	25	95
Approved Suppliers	30	35	35
Total	370	395	520

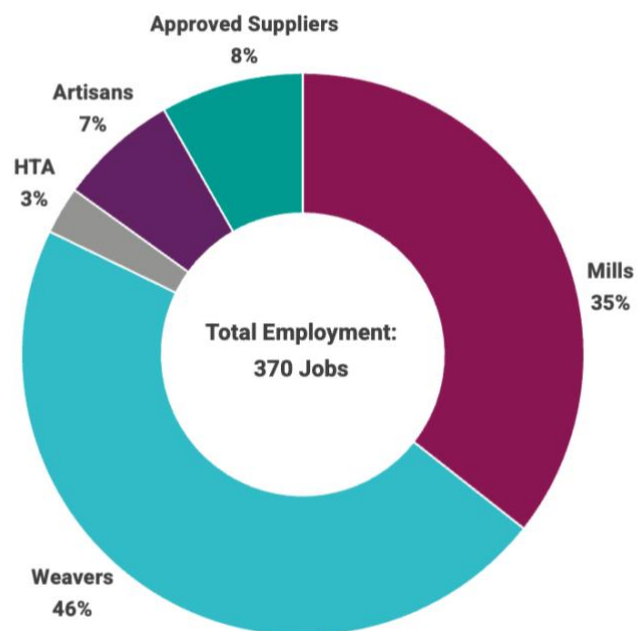
Source: BiGGAR Economics Analysis. Note: Totals may not sum due to rounding.

9.1.1 Employment Effects in the Outer Hebrides

Just under half of the total jobs described above are generated through direct, indirect, and induced activity associated with the weavers, with a further 36% associated with the mills.

Recognised as two of the largest private sector employers on the Outer Hebrides, Harris Tweed Hebrides Ltd and Kenneth Mackenzie Ltd make a significant contribution to supporting jobs in the local economy and initiating the production process for Harris Tweed®.

Figure 9-1 Breakdown of Outer Hebrides Employment Impact



Of the total employment impact described above, approximately 328 of these were direct jobs generated by Harris Tweed®, of which almost half (49%) were self-employed weavers and a third (33%) were mill workers, equivalent to a total of 276 jobs. This is broadly similar to the number of people directly employed in fish farms on the island²⁰. A further 59 direct jobs were generated by Harris Tweed®, including those associated with the Harris Tweed Authority, artisans, approved suppliers, and tourism.

In addition, through expenditure on supplies, capital expenditure, and the expenditure of workers' incomes, Harris Tweed® generated 42 jobs in the Outer Hebrides.

In absolute terms this number of jobs is not huge, but context is important. Many of the jobs supported by Harris Tweed® are in very small communities where even a small number of jobs can make a big difference.

²⁰ BiGGAR Economics (2025), Economic Impact of Scottish Salmon Farming.



9.2 The Societal Contribution of Harris Tweed®

9.2.1 Community Resilience

As highlighted in Section 3.1, Harris Tweed® weaving is heavily concentrated along the western coastal fringe of Lewis, in some of Scotland's most economically fragile communities. The industry has co-evolved alongside crofting and the employment opportunities it provides are part of the distinct multi-income system characteristic of this uniquely Scottish way of life.

If they did not exist, alternatives for local people living in these communities would be more limited. This would almost certainly exacerbate the long-standing challenge of population retention. By providing people with a livelihood (or at least a way of supplementing their income), Harris Tweed® plays an important role in countering depopulation and helping sustain viable, resilient communities.

9.2.2 Dualchas

With a storied history deeply rooted in folk memory and colours that evoke the landscape of the Islands, Harris Tweed® is much more than a fabric. Durable, authentic and versatile, it embodies the very character of the Outer Hebrides. These characteristics give Harris Tweed® special cultural significance.

This matters. A strong sense of cultural identity fosters self-esteem, resilience, and a sense of belonging²¹, all of which are all linked to wellbeing. By helping to create this 'dualchas', Harris Tweed® enhances the wellbeing of islanders.

The concept of dualchas also has economic significance. Research shows landscape, history and culture are central to visitor motivation, making them an important driver of the Outer Hebrides tourism industry that accounts for between £45.6 million and £69.3 million/year in local visitor expenditure. As an intrinsic part of the cultural heritage of the Islands Harris Tweed® helps underpin this expenditure.

9.3 Changes Since 2009

A previous analysis of the economic impact of Harris Tweed® undertaken in 2009²² found that the industry generated a total of £3.9 million GVA/year for the Outer Hebrides economy. This equates to around £5.9 million GVA/year in 2024 prices. At that time, it was estimated the industry directly supported 134 FTE jobs and a further 41 indirect and induced jobs, giving a total of 175. Whilst the two methodologies differ, comparison with this study shows this economic impact has increased substantially, with both annual GVA and the number of jobs supported more than doubling.

²¹ Osborne, E., & Taylor, D. M. (2010). The role of cultural identity clarity for self-concept clarity, self-esteem, and subjective well-being. *Personality and Social Psychology Bulletin*, 36(7), 883–897.

²² Alba Consult Ltd (2009), Harris Tweed Industry: Economic Impact Study, a report to Highlands and Islands Enterprise.



The economic contribution of Harris Tweed® to the Outer Hebrides has almost doubled since 2009.

This is not surprising. Over the same period production of Harris Tweed® increased substantially. It is likely that this was, in part, a reflection of the fact that the industry switched from traditional single-width looms to more modern double-width looms during this period. It is also likely that the increase in impact reflects the troubled state of the industry at the time the previous study was undertaken. What is of greater note is how these changes have been reflected in the workforce, particularly the weavers who transform the warped beam and weft yarn into fabric.

Since the previous study was undertaken the total number of active weavers involved in the industry has doubled. Alongside this increase, the amount of cloth produced by each weaver has also increased, by around 225%. Ordinarily, it would be expected that productivity increases of this magnitude would be reflected in returns to labour. However, in the case of Harris Tweed® this does not seem to have happened. This is an important challenge for the industry both in terms of future recruitment and brand reputation that will need to be addressed to assure future success.

Ensuring the workforce benefits from the success of the brand is critical to the future of the industry.

The analysis presented in this report suggests the foundations for this transition are already in place. Since the previous study, there has been a significant rise in artisan production and a growing recognition of Harris Tweed® as a cornerstone of the island's tourism industry, activity built entirely on the strength of the brand.

Securing the industry's future requires collaboration between the mills, weavers, and HTA to implement new strategies to leverage this global brand strength for local benefit. This report has identified specific opportunities to deepen the economic footprint of Harris Tweed® in the Outer Hebrides. Including:

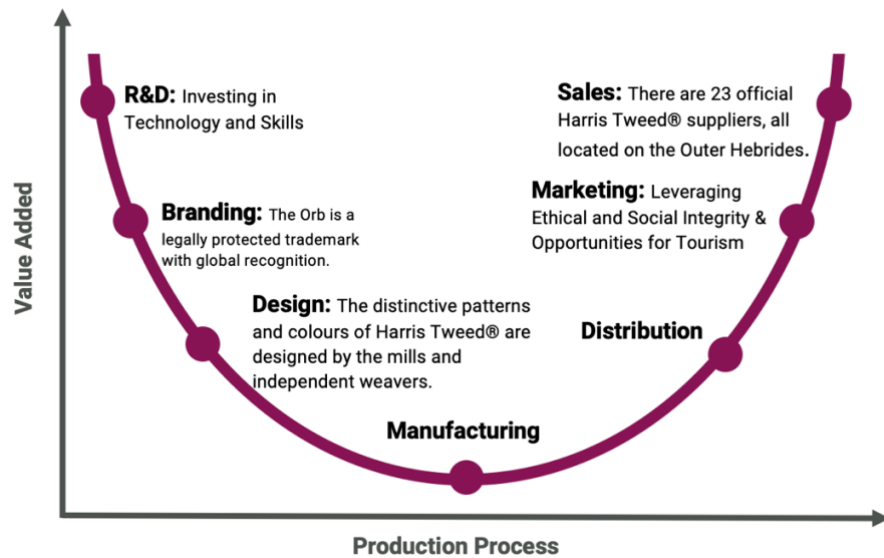
- investing in **skills and technology** to support the maintenance of looms and mills equipment in the Outer Hebrides;
- **leveraging the brand's ethical and social integrity** to position Harris Tweed® as a "slow luxury textile" and an archive of environmental change;
- further **the brand's tourism offering** through a Harris Tweed® Trail and hosting events and festivals on the Outer Hebrides.

By developing strengths in these areas alongside existing strengths in branding, design, and sales, there is a substantial opportunity to enhance the industry's value to the Islands (Figure 9-2). Focusing on these activities could provide a pathway to



distributive growth that could enable those at the heart of production to fully share in the returns, helping to build a truly sustainable foundation for the long term.

Figure 9-2 Smile Curve: Current Activity & Future Opportunities



Source: Adapted by BiGGAR Economics based on Stan Shih (2010). Me-Too Is not My Style.

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