



Australian Wool
Innovation Limited

BUYER VIEWS ON MULESED WOOL SURVEY JUNE 2023

*An international survey of 198 wholesale and
retail users of wool across 27 countries*



PRAGMATIC
Research & Advisory Services

SURVEY OVERVIEW

AWI's 2021 independent Review of Performance recommended the commissioning of an independent report to measure international sentiment towards mulesed wool.

In May 2023 AWI engaged Pragmatic Research as a probity advisor to assist with the development of a survey of wholesale and retail users of wool, across 27 countries, on consumer attitudes towards sustainability issues and the impact these have on running their businesses and meeting customer demand. The survey found that environmental sustainability was important to most aspects of their businesses, including:

- Environmental sustainability was important
- Recycling and renewing are primary sustainability considerations
- Animal welfare and mulesing are mid-tier priorities
- Wool is seen as a sustainable fibre
- Price, look, feel and care are the main challenges, and
- There is a diversity of views vary across markets around animal welfare and mulesing

We share the survey findings with AWI's wool industry consultation groups, the Woolgrower Industry Consultation Panel (WICP) and the Woolgrower Consultation Group (WCG), on wool.com, and at grower workshops and events like Future Wool. The survey results help inform AWI's R, D & E planning and expenditure. AWI provides wool growers with a range of tools and workshops to assist with the management of flystrike and/or to move towards a mules free enterprise.

Additionally, the results are shared across the AWI/Woolmark global network of business development managers and their partners. The survey will be used as a baseline for future research on consumer attitudes towards sustainability issues.

The survey provides an important snapshot on how sustainability considerations are prioritised in different markets and the challenges they represent to these businesses.

EXECUTIVE SUMMARY

The comprehensive survey of 198 wholesale and retail users of wool across 27 countries provides an important snapshot on how sustainability considerations are prioritised in different markets and the challenges they represent to these businesses.

Key findings from the survey include:

- Environmental sustainability was important to most aspects wholesale and retail businesses, especially marketing, business strategy and meeting regulatory requirements and amongst Chinese and Southeast Asian wholesale and retail users of wool.
- Recycling and renewing are the main sustainability considerations. Using recycled materials (65%), renewable energy (57%), regenerative materials (52%) and biodegradable materials (52%) were the main priorities for wholesale and retail users of wool.
- Animal welfare and mulesing are mid-tier priorities. Animal welfare standards (46%) and using non-mulesed wool (45%) were comparatively less of a priority, although still a consideration for almost half the sample.
- Wool is seen as a sustainable fibre. For the majority of wholesale and retail users of wool respondents, wool was seen as a 'very sustainable' fibre (55%). Just over a third (39%) also considered wool 'quite sustainable'. Only 6% questioned the sustainability of wool.
- Price, look and feel and care are the main challenges, animal welfare and mulesing are lower-level concerns. Price (8.2) and product look, feel and care requirements (7.0) are the main challenges for selling wool products. Attitudes around mulesed wool (6.8) and animal welfare standards (6.1) were seen as relatively less of a challenge.
- Diversity of views around animal welfare and mulesing, highest concern in Europe. The perceived priority and challenges of these two issues varies across markets, reflecting the different cultural and economic environments. Although they are most pertinent for European wholesale and retail users of wool (especially in Germany), where the well-established animal rights movement has led to a number of anti-mulesing protests. By contrast, most Asian markets (and Australia) were generally less concerned by the impact of animal welfare standards and the use of mulesed wool on their businesses.
- Benchmark for future tracking. This study is the first of its kind to offer a comprehensive and accurate view of the attitudes wholesale and retail users of wool to sustainability issues. The robust sample of 198 ensures the credibility of the results. We would recommend the study is repeated every three to five years to monitor shifts in attitudes to inform AWI's decision making and strategies.