



# Wool 2030 strategy

Australian wool:  
The world's premium  
sustainable fibre

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## Foreword

# A brighter future for Australian woolgrowers

Woolgrowers are at the heart of the industry's 10-year strategic plan: Wool 2030. After all, the voices of more than 800 woolgrowers crafted it.

Wool 2030 was born of a recommendation that arose from the 2018 review of AWI by Ernst and Young.

It has involved consultation and oversight by woolgrowers and wool industry members who provided input into the key considerations. From that, AWI's Woolgrower Consultation Group and next generation representatives developed the plan.

The plan you see today addresses those issues the industry considers key to a prosperous future: driving demand, demographics, perception, profitability and people. It asks today's growers to consider the story of wool internationally in 2030 and what the daily life of a woolgrower in Australia might be in ten years' time. What is also important is to identify efficiencies, promote best practice, to always keep in mind our buyers and customers.

The Merino breed continues to be a central focus; a point-of-difference in a competitive global landscape. The plan has an ambitious national flock growth target and retention of the Merino ewe base at or above its current proportion is crucial to the industry's strength in 2030.

With the increasing trends towards mixed farming domestically, we know that positioning wool as a rewarding, profitable land-use choice to the next generation landholder is core to meeting our growth targets.

A deep desire to meet the expectations of consumers worldwide is reflected in the Wool 2030 tagline: the world's premium sustainable fibre.

As we embark upon the delivery of Wool 2030, there are both extraordinary opportunities and unfamiliar challenges ahead. Australian woolgrowers are up to that challenge.



**Lyndsey Douglas**  
Chairman  
Woolgrower Industry  
Consultation Panel





# The world's most exceptional wool

If wool immediately brings to mind the idea of warmth, something natural that embraces you and makes you feel cozy and good, Australian wool is the epitome of this: it's the most exceptional wool in the world. Experience, quality and tradition are the hallmarks that have made Australia the international leader, both in terms of quality and quantity, and therefore also in worldwide exports of wool.

Today, it is crucially important to consolidate this leading position, and in order to do so it is necessary to keep up with the times. Consumer behaviour, especially among the younger generation, calls for more and more attention to sustainability and therefore to breeding and manufacturing methods that protect animals and the environment. Consumers are also willing to pay a higher price if the values underpinning production of the raw materials are compatible in this regard.

Throughout my professional life, I've only ever known conscientious breeders who have always favoured animal welfare as it's closely linked to the highest quality. They take the best possible care of their sheep and their pastures because it represents the livelihood of their families and employees. The prerequisites are already in place: everybody must

continue to pay the same attention, and even more so, to all aspects connected to sustainability and, to the safeguarding of the environment and the protection of our planet.

The whole wool supply chain has to move in the same direction. All growers must follow the same path together with their clients downstream, to all aim in reconfirming Australian wool as the best in the world.

The downstream supply chain is committed to transform the best wool in the world into increasingly innovative yarns, fabrics and garments, through sustainable processes, in order to meet or anticipate the needs of the new global consumer.

Ermenegildo Zegna has always been committed to these values and continues to uphold them



through transforming the best of the Australian superfine wool into increasingly sustainable, innovative, creative and top-quality products, reducing waste across every step of the long supply and manufacturing chain. And wool, with its incredible characteristics, is constantly highlighted in our marketing activities.

Our belief is a simple one: we're certain that today's actions will determine our future. And everybody involved in the value chain of wool must do its part.

A handwritten signature in black ink, appearing to read 'Paolo Zegna'.

**Paolo Zegna di Monte Rubello**  
Chairman of  
Ermenegildo Zegna Group







Vision

# The world's premium sustainable fibre

Australian wool – the ultimate  
assurance of sustainability:  
natural, renewable, recyclable,  
and biodegradable



# Purpose

## To have profitable, resilient and sustainable sheep and wool businesses.

The underlying principle of this 10-year plan for woolgrowers is sustainability: in the careful management of our animals and the land they occupy, and the wellbeing of our woolgrowers and their customers, all of which are essential for sustained profitability.

Profitability, in turn, is the key to investment in the sector. Profitability allows us to invest in innovation on-farm and along the pipeline, including the development of new wool products to meet current and changing consumer needs. We will also invest in increasing the capability

of our people, facilitating stronger relationships with our customers and creating confidence and pride in the industry more generally.

The Australian wool industry is diverse. It spans most of the continent and a range of agroecological zones. Sheep are run as specialist wool flocks, dual-purpose flocks and/or as part of mixed farming enterprises. They produce a variety of wool types that supply a diversity of markets. This plan has a focus on meeting all those needs.

Importantly, this plan seeks to unite all sectors of the Australian wool industry – growers, service bodies, brokers, exporters/buyers and processors – in the relentless pursuit of understanding and exceeding customers' requirements. Those requirements embrace not only the superb physical attributes of the wool they produce, but also the story about the people, sheep and land that produced it.



# Wool 2030 story #1

Jordan Hayes\* receives a message on her phone. She has been offered a forward contract on a proportion of her Merino wool from a clothing brand that has worked in partnership with Jordan for five years now. The price represents a profitable margin over her cost of production, so she accepts the offer. That's one job done.

Jordan is certified under one of the new ethical wool production schemes. The scheme is rigorous and demanding, with standards for animal welfare, soil health, biodiversity, chemical and antimicrobial use and other aspects of the production system. Certification accompanies the wool right through the pipeline and is seen on garment swing tags. Clothing buyers scan the tags and are able to read all about her property and how she looks after her sheep. She has even had messages from people around the world thanking her for their garments!

Jordan knows from the market reporting that her ethical certification is delivering a substantial premium, well above the cost of compliance. The farm undergoes a comprehensive audit once per year that covers Jordan's obligations, not only under the ethical wool scheme but also her branded MSA lamb program and Livestock Production Assurance (LPA) requirements more generally. The audit is not a

great impost, as Jordan has all of the required information on her farm management software, which automatically generates statements of compliance against the various schemes in operation in the industry. And thankfully these schemes are all 'equivalent', removing the need for multiple audits.

In recent years, Jordan has started to receive 'ecosystem services' payments from government and from private schemes. Her wool and surplus sheep income is supplemented by biodiversity payments along with some carbon credits. During the past 20 years she has invested in a range of accredited carbon sequestration activities to the stage where she is pretty close to carbon neutral now.

The sustained profitability of her enterprise, and some smart new virtual fencing technology, have helped Jordan to regenerate riparian and other areas of the farm. This has resulted in improved biodiversity

and creek health. It has also facilitated efficient grazing and worm management. Jordan simply logs into the app and redraws the fence lines, and the sheep gradually move onto their new pastures.

Today's main task is to review the seasonal climate outlook and formulate a management plan for the coming month. Sensors around the farm allow Jordan to monitor rainfall, ambient temperature and wind, as well as soil temperature and moisture, in real time. This data, combined with the bureau's forecasts – which continue to improve in accuracy – allow readily available models to predict likely scenarios for pasture production during the next 3 months.

The risks involved in wool production certainly haven't gone away, thinks Jordan, but there's peace of mind in knowing she can mitigate the worst of them.

\*Fictitious name



Jordan has delighted in seeing the continued restoration of her farm and the increased biodiversity as a result.



# Opportunities and risks

The Australian wool industry faces a decade of unparalleled opportunity. Wool has many outstanding performance attributes as a textile fibre. Increasingly, consumers also seek products with strong sustainability credentials. Wool is the first choice for a sustainable fibre because it is natural, renewable, recyclable and biodegradable.

Technology also offers great opportunities for wool in the modern world. More than ever before, woolgrowers can converse with their customers, both to understand what different markets require, and to convey the story of Australian wool production. A wide range of product specifications, including raising claims, can be transmitted with the physical product and price signals conveyed to farm level.

Technology also promises to solve some of the challenges of wool production such as efficient harvesting and management of pests and disease. Advances in genetics offer even further improvement in Australian sheep and the wool they produce.

There are also significant strategic risks to the industry. In the late 20th Century, key wool industry risks were largely concerned with technical and commercial attributes of the fibre – price, production, specifications, processing and product performance. Today, those same industry risks remain but have been added to by what are best described as ‘social licence’ risks – animal welfare, environmental sustainability (regeneration), emissions profile and so on.

During the development of Wool 2030, growers and industry participants placed considerable emphasis on the risks that the industry now faces, including these complex social licence issues.

Society today has more information about goods and services from more sources than ever before, and is demanding more information, transparency and traceability. It can be expensive to undertake activities to maintain social licence, but much more expensive and even prohibitive to regain it once it has been lost.

Other key risks to the wool industry include restrictions in free trade and market access, stalled economic growth, competition from other fibres and competition from other agricultural sectors for limited resources.



## Key opportunities and risks for Australian wool, and how this plan addresses them, include:

**Animal health and wellbeing, including protection from disease and predation** (Pillar 1)

**Environmental sustainability (including regenerative agriculture) – access to resources** (Pillar 1)

**Greenhouse gas emission profile** (Pillar 1)

**Chemical use** (Pillar 1)

**Biosecurity** (Pillars 1 and 4)

**Communication of wool's unique benefits** (Pillar 2)

**New wool products** (Pillar 2)

**New and diversified markets** (Pillar 2)

**Free trade and market access** (Pillar 2)

**Global economic growth and pandemics** (Pillar 2)

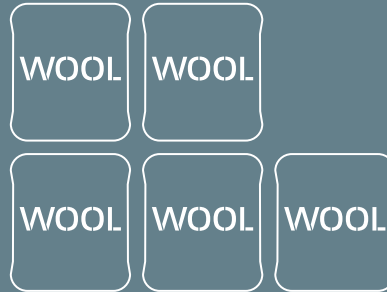
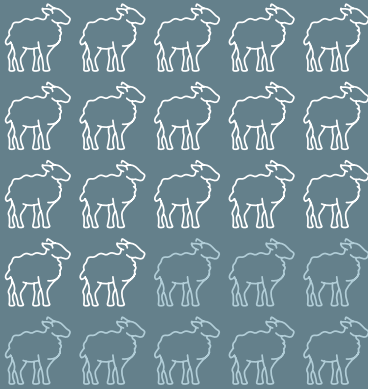
**Innovation in production, harvesting and distribution of wool** (Pillar 4)

**Adaptation to climate change and variability** (Pillar 4)

**Workplace health and safety for all workers** (Pillar 5)

**Competition – other fibres and other sectors** (all pillars)

# Situational snapshot



68%

of all ewes in Australia are Merinos

368 = 18%

million kgs of Australian wool (all wool\*)

of the world's wool production



70%

of the world's apparel wool comes from Australia



In 1991/92  
average fibre  
diameter was  
22.0µm

In 2019/20  
average fibre  
diameter is  
20.5µm

The Australian wool clip is nowadays much finer, with the average micron profile decreasing by 1.5µm during the last 28 years

\*Includes sheepskins, shorn and fellmongered wool – ABARES



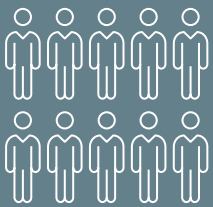
# \$3.6b

Average 5-year GVP of wool in Australia (gross value of production)

Australia produces

# 80%

of the world's superfine wool (<18.5 microns)



# 200,000

people employed

# 33

countries to which Australian wool was exported in 2019



# 76,000

wool levy payers

Source: AWTA, ABS, IWTO, AWI, UN Comtrade

## What the consultations told us



Australian wool is perfectly suited to the ‘buy less, buy better’ philosophy that’s emerging among consumers. We have to tell the story of wool’s marvellous attributes.



Woolgrowers need to understand the different products in which wool is used, and the raw wool specifications needed for those products. Then, they can then align their production system to best meet market needs.



Australian wool has to be easy to buy. It must be fully described, tick all the ethical boxes and be readily available.



We are getting used to the idea of the ‘Perspex office’ – just because we are in the office doesn’t mean we are not doing real work. More and more, we will be managing data rather than getting our boots dirty.



Our highest R&D priorities remain harvesting and flystrike, and making sheep less labour-intensive.



It’s vital that the industry speaks with a single, united voice.

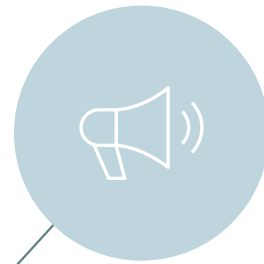


## Pillar 1 – Caring for our animals and the environment

- Growers have the confidence and tools to manage flystrike without mulesing
- Australian wool production is moving towards carbon neutrality
- More than 50% of wool is sold under a quality certification scheme
- Woolgrowers are earning income from ecosystem services, including for carbon mitigation

## Pillar 2 – Marketing the world’s most desirable fibre

- New wool products are developed to meet evolving consumer needs
- Australian wool attracts a price premium over equivalent wools from other countries



## Targets

By 2030, the Australian wool industry will have grown in value by 2.5% annually from 2019/20. This growth will come from:

- An increase in value per head of sheep of 15%
- An increase in flock size from 67 to 75 million, with an increased proportion of Merinos in the ewe flock



## Pillar 3 – Communicating with our customers

- Australian woolgrowers understand the market(s) they serve
- 95% of Australian wool is sold with a completed National Wool Declaration or equivalent by June 2022

## Pillar 5 – Fostering a prosperous woolgrowing community

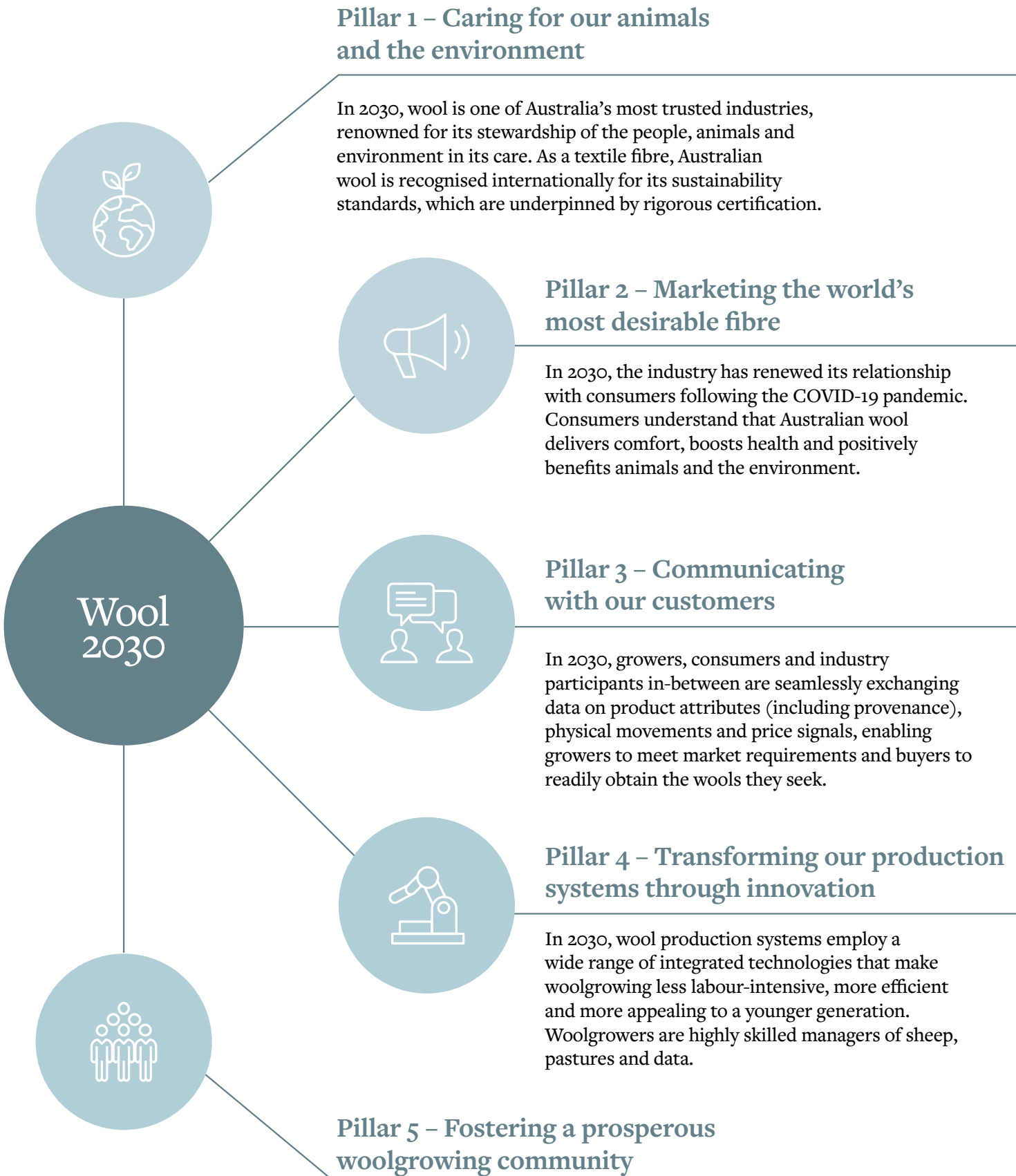
- Staff and contractors feel valued by the industry
- The Australian wool industry is seen to be united and cohesive
- Woolgrowing is perceived as a satisfying and profitable pursuit



## Pillar 4 – Transforming our production systems through innovation

- Lamb weaning rates increase by 5 percentage points
- Genetic gain is 2% per annum
- Cost of harvesting reduces by 3% per annum in real terms

# Pillars of success



In 2030, the woolgrowing community in Australia is cohesive, collaborative and committed, speaking with one voice. Woolgrowers are skilled professionals who understand their markets and manage complex production systems. Young people are enthusiastic new entrants.

Continuously improve animal welfare

Protect our sheep against flystrike

Protect our sheep against other endemic and exotic health risks

Strive for carbon neutrality of wool production

Leave our agri-ecosystems in better condition with every passing year

Promote the unique benefits of wool

Develop innovative wool products

Build existing and new markets for wool products

Maintain and build the reputation of the Woolmark

Ensure access to key markets

Develop a COVID-19 recovery plan

Assist growers to better understand customer requirements

Increase the efficiency of pipeline data management and range of specifications

Facilitate the sale of wool based on raising claims

Increase marketing options for growers

Increase the uptake of price risk management tools

Continuously improve product quality in line with customer needs

Develop or adapt new technologies to increase sustainability and efficiency

Improve the performance of wool sheep

Improve the way wool is harvested and distributed

Reduce the threat of predators

Increase the resilience of woolgrowing systems to climate and other risks

Develop skills of industry participants

Promote pride and succession in the industry

Build a collaborative industry

Advocate for the wool industry

Improve health and safety



# Pillar 1

## Caring for our animals and the environment

Consumers expect that a luxurious fibre such as wool will have impeccable animal welfare and environmental credentials. These are priorities for woolgrowers, too.

## Caring for our animals and the environment



### Continuously improve animal welfare

Meet the 'Caring for our sheep' priorities identified in the Australian Sheep Sustainability Framework, and the requirements of the Australian Animal Welfare Standards and Guidelines



Pursue a '3Rs' approach to invasive procedures: Replace, Reduce, Refine

### Protect our sheep against flystrike

Develop tools and systems so that growers have the confidence and the capacity to manage flystrike without mulesing

### Protect our sheep against other endemic and exotic health risks

Prioritise RD&A into non-chemical solutions for blowflies, worms and lice



Contribute through Animal Health Australia to disease preparedness and response



Meet the 'Animal health' ('Manage biosecurity') priorities identified in the Australian Sheep Sustainability Framework

### Strive for carbon neutrality of wool production

Undertake collaborative RD&A on emissions reduction



Meet the 'Enhancing the environment and climate' ('Climate change') priorities identified in the Australian Sheep Sustainability Framework



Support the red meat industry's CN30 goal

### Leave our agri-ecosystems in better condition with every passing year

Undertake collaborative RD&A on environmental improvement



Advocate for ecosystem services payments for farmers, including for carbon



Meet the 'Enhancing the environment and climate' ('Environment') priorities identified in the Australian Sheep Sustainability Framework

# Pillar 2

## Marketing the world's most desirable fibre

Australian wool has a great story to tell: it is natural, renewable, recyclable and biodegradable, and it promotes health. It is also modern, the first choice of fibre for comfortable, luxurious and high-performing products.



## Marketing the world's most desirable fibre



### Promote the unique benefits of wool

Emphasise wool's sustainability and health credentials



Capture the next-to-skin market

### Develop innovative wool products

Develop new products, for wools of all microns, that build on wool's strengths, in conjunction with commercial partners

### Build existing and new markets for wool products

Grow the presence of Australian wool of all microns in markets (geographical and by segment) that deliver the highest returns

### Maintain and build the reputation of the Woolmark

Investigate ways for the Woolmark to more actively promote Australian wool

### Ensure access to key markets

Advocate for free access to important markets for wool, including through free-trade agreements



Minimise the risk of export disruption due to an emergency animal disease outbreak

### Develop a COVID-19 recovery plan

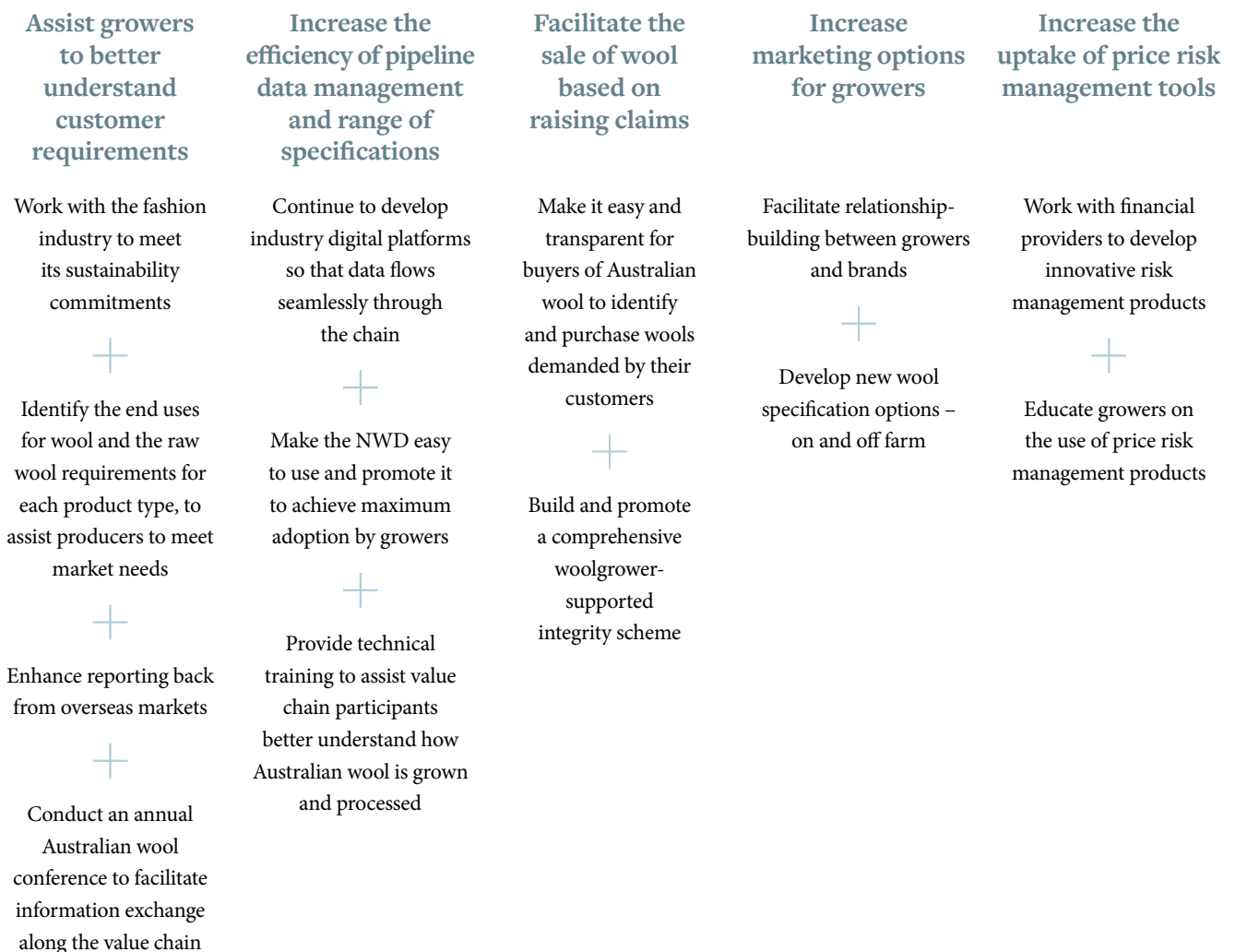
Review and, if necessary, reinvent the industry's marketing program once short and longer-term social and economic changes have been discerned

# Pillar 3

## Communicating with our customers

The wool value chain will operate most effectively when all participants communicate openly and efficiently. New technologies offer opportunities to 'shorten' the chain.

## Communicating with our customers





# Pillar 4

## Transforming our production systems through innovation

Innovation will continue to drive productivity and quality improvements in woolgrowing, as well as enabling key threats to be addressed. Recognising the dual purpose nature of the Merino and other breeds, RD&A will be a collaborative effort with the sheepmeat industry.

## Transforming our production systems through innovation



### Continuously improve product quality in line with customer needs

Building on Pillar 3, support woolgrowers to produce to target market requirements through information and RD&A



Develop information packages to deliver quality product under a variable climate

### Develop or adapt new technologies to increase sustainability and efficiency

Exploit new agritechnologies such as the Internet of Things, remote sensing, drones, identification technologies, virtual fencing and machine learning



Continue to build the capability and uptake of genetic and genomic technologies



Develop data management platforms and decision-support tools to allow growers to make valued use of data

### Improve the performance of wool sheep

Continue to drive genetic improvement to deliver higher sheep performance in all production zones with a focus on the yield and quality of both wool and meat, reproductive rate and easy-care attributes



Improve the feedbase, including through the management of total grazing pressure



Meet the Sheepmeat Industry Strategic Plan target to increase weaning rates by 5%

### Improve the way wool is harvested and distributed

Focus research effort on making wool harvesting safer, cheaper and less labour-intensive



Apply innovation to increase the efficient handling and distribution of wool

### Reduce the threat of predators

Apply existing and new technologies to prevent predators, especially wild dogs, impacting sheep flocks

### Increase the resilience of woolgrowing systems to climate and other risks

Develop and demonstrate adaptive, resilient woolgrowing systems that allow woolgrowers to manage a changing climate



Further develop tools to optimise decision-making in response to seasonal conditions



Maintain the pasture base for environmental and production benefits

# Pillar 5

## Fostering and promoting a prosperous woolgrowing community

Woolgrowing is a profitable and relatively low-risk broadacre enterprise. It must become an even more satisfying and rewarding pursuit to attract and retain the best people.

## Fostering and promoting a prosperous woolgrowing community



### Develop skills of industry participants

Expand woolgrower skills to meet the needs of a transformed, complex and modern industry



Facilitate the development of leadership skills by woolgrowers



Facilitate grower groups and networks

### Promote pride and succession in the industry

Promote a positive perception of the wool industry to younger generations, the community and government



Provide positive opportunities for people to enter the industry at secondary, tertiary and postgraduate levels, encouraging inclusivity and diversity



Promote succession planning

### Build a collaborative industry

Increase active collaboration between growers and service bodies, brokers, exporters/buyers and processors



Identify opportunities for cross-sectoral collaborative projects



Identify novel sources and models for funding of RD&A and marketing

### Advocate for the wool industry

Advocate for an operating environment that recognises and supports the positive social influence of the wool industry



Speak with one clear voice, united among ourselves and as one with the sheepmeat industry



Support woolgrowers to be ambassadors for their industry

### Improve health and safety

Provide safe and welcoming working environments, particularly in shearing sheds and yards



Support mental health initiatives

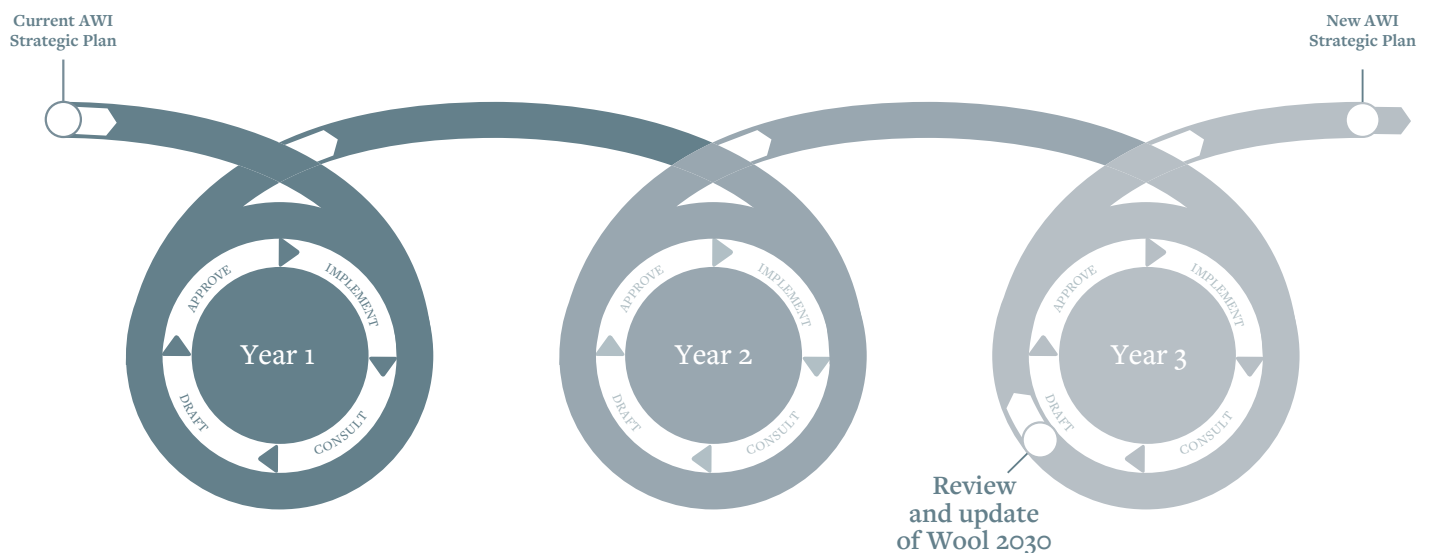


Meet the 'Looking after our people, customers, communities' ('Health and safety') priorities identified in the Australian Sheep Sustainability Framework



Wool 2030 –

# Putting the plan into action



This plan has deliberately been designed as a high-level, aspirational statement of intent and strategy for Australian woolgrowers. To meet the targets of the plan, the pillars and strategies set out in this document must be translated into concrete actions and responsibilities.

AWI is owned by its woolgrower members and will assist in the coordination and implementation of this plan. In accordance with the 2018 Review of Performance of AWI, Wool 2030 will be a key reference point in the development of AWI's own three-year strategic plan (please see figure at left).

Responsibility for the implementation for Wool 2030 extends beyond AWI, however, to organisations and individuals across the Australian wool industry. Implementation will require close and constructive collaboration between:

- AWI: R&D and marketing activities to support all pillars
- AWEX and AWTA: innovation in selling and testing services especially in support of pillars 2, 3 and 4
- AHA: animal health and welfare activities, guided by WPA as the wool growing member of AHA responsible for strategic levy allocation in this area, especially in support of pillars 1 and 2
- Brokers: innovation in selling and testing services, grower advice and support, selling and connection with customers, across all pillars
- Exporters, private treaty merchants and local processors: connection with customers, especially in support of pillars 2 and 3; and
- Overseas brands and retailers to provide counsel on future customer and consumer priorities, specifically addressing pillars 1, 2 and 3.

Individual woolgrowers, ram breeders and their peak bodies are integral to the implementation of all parts of the plan.

Oversight of the plan will be provided by a Wool 2030 Steering Group comprising an independent chair and representatives of:

- National woolgrower and stud breeder organisations
- AWI, AWEX and AWTA
- DAWE
- NCWSBA, ACWEP and PTWMA
- A major international processor of Australian wool; and
- A major fashion house using Australian wool.

The Steering Group could be supplemented from time to time (or sub-groups formed on specific issues) with representatives from other areas such as Shearing Contractors' Association of Australia, Livestock Contractors' Association, AHA or animal welfare groups.

Membership of the Steering Group should be managed to ensure as much diversity as possible. In particular, it is vital that the group includes a high proportion of younger industry participants.

The Steering Group will meet every six months by videoconference. It will have an extended, face-to-face meeting every three years to review and revise the plan. It is anticipated that the Steering Group will operate on consensus decision-making founded on an understanding that Wool 2030 exists primarily to further the interests of Australian woolgrowers.

Funding and administrative support for the Steering Group will be provided by AWI as part of its strategic planning consultation process.

A central role of the Steering Group will be to measure progress against the targets in this plan. Data to demonstrate progress will be collected from a range of sources including:

- ABS – wool industry gross value of production
- AWPFC – sheep numbers and composition
- Triannual AWI/MLA Wool and Sheepmeat Survey and Merino Husbandry Practices Survey – grower practices, weaning percentages
- AWEX – data on NWD completion rates, sales under quality certification
- AWI annual reports – new product development
- Comparison of equivalent AWEX types in Australia and South Africa
- MERINOSELECT – genetic gain
- Biennial grower and staff survey (new) – perceptions of satisfaction, cohesion in the industry, understanding of wool markets, availability of revenue from ecosystem services; and
- To be confirmed – carbon status and cost of wool harvesting.

The Steering Group will publish a brief, biennial summary of progress against targets starting in December 2022.



# Wool 2030 story #2





Jack\* looks out from his veranda, and smiles at the familiar landscape and the call of the birds. It looks just as it has for all of my life, he thinks, and yet so much has changed. Developments over the past 10 years in particular have transformed the way he and his family run their pastoral sheep enterprise.

Take flystrike, for example. Ten years ago, managing flystrike was the most challenging animal welfare problem for pastoral producers. A range of new tools have made flystrike much less of a concern. Genetics has been the most important of these. Ever more efficient genetic technologies have assisted breeders to develop bloodlines that are largely resistant to blowflies, without losing their renowned productivity. The occasional individual sheep still succumbs in the face of high fly pressure. When that happens, a sensor tag identifies a compromise in the animal's health and activates automatic gates at watering points to catch it in a pen. Jack receives an alert and organises to treat the animal.

Mulesing is a thing of the past, of course. Not that it was actually banned; everyone just moved away from it. The change happened quickly in the end. The combination of increased premiums for non-

mulesed wool and producers' confidence in managing non-mulesed sheep allowed the rapid change. Jack has been selling non-mulesed wool for eight years now. Initially the premium was attractive, but of late it is hard to gauge, as the vast majority of Australian wool is sold as non-mulesed.

Other technologies have made a huge difference too. Last month, Jack's focus was shearing and classing the ewes. A hand-held device, placed against the skin of each sheep in the counting-out pen, was used to read follicle density and fibre diameter. This information was analysed by an app together with the sheep's health and reproduction records and the classing results from the robotic wool table. The app then provided recommendations on which ewes to retain.

All this data, in conjunction with the genomic evidence from his ram source, has delivered rapid genetic gain in fleece quantity and quality, flystrike resistance and reproduction.

It makes Jack proud that Australian wool is still regarded as the best in the world, and it's very satisfying to be part of such a vibrant industry. The development of exciting new wool products and the general move by consumers back to natural fibres has really put a solid floor in the wool price. His fine wool Merino flock provides a good living. No wonder his son is keen to return and take on the farm – once he has finished his studies and gained some experience elsewhere, of course.

The drone landing next to the house interrupts his thoughts....

\*Fictitious name



# How the plan was developed



## The development of a 10-year strategic plan for Australian woolgrowers was one of the recommendations of the 2018 review of performance of Australian Wool Innovation (AWI) by Ernst and Young.

The plan was facilitated by AWI and overseen by AWI's Woolgrower Consultation Group (WCG), which comprises 28 production-based woolgrower group representatives from across Australia, as well as members of AWI's Woolgrower Industry Consultative Panel (WICP). The WICP has seven members from national woolgrower organisations, is led by an independent Chair, and also includes Department of Agriculture, Water, and the Environment (DAWE) and AWI representatives.

For the development of Wool 2030, each WCG member invited a next-generation representative to participate, making a steering group of approximately 60 people.

There was wide consultation in the development of the plan, although this was restricted to 'virtual' events because of the COVID-19 pandemic. Initially, a series of five discussion papers on key topics were prepared to inform debate by the WCG and the next generation representatives. The papers included some key questions and discussion points on important strategic considerations.

Following the WCG webinars, small-group consultations were undertaken by webinar covering:

- AWI Nuffield scholars, Breeding Leadership participants and state grower network members
- Members of state farming organisation councils and executive

- Senior management of AWTA and AWEX; and
- Board and executive of NCWSBA, ACWEP, PTWMA and WIA.

In addition to the face-to-face consultations, an industry online survey was run for five weeks. The survey attracted more than 850 responses.

A draft plan was developed and circulated to the above groups and the AWI Board for further input.

The final plan was launched in December 2020.



## Acronyms and abbreviations

ABS	Australian Bureau of Statistics
ACWEP	Australian Council of Wool Exporters and Processors
AHA	Animal Health Australia
AWEX	Australian Wool Exchange
AWI	Australian Wool Innovation
AWPFC	Australian Wool Production Forecasting Committee
AWTA	Australian Wool Testing Authority
CN30	Carbon Neutral 2030
COVID-19	Coronavirus disease 2019
DAWE	Department of Agriculture, Water and the Environment
GVP	Gross value of production
IWTO	International Wool Textile Organisation
LPA	Livestock Production Assurance
MLA	Meat & Livestock Australia
NCWSBA	National Council of Wool Selling Brokers of Australia
NWD	National Wool Declaration
PTWMA	Private Treaty Wool Merchants of Australia
R&D (&A)	Research and development (and adoption)
SISP	Sheepmeat Industry Strategic Plan
SSF	Sheep Sustainability Framework
µm	Micron
WCG	Woolgrower Consultation Group
WIA	Wool Industries Australia
WICP	Woolgrower Industry Consultative Panel





# Wool 2030 strategy

[2030.WOOL.COM](http://2030.WOOL.COM)