

INTRODUCTION

In recalling their experiences of travelling to China for the trade of Australian-grown wool, many of the woolgrowers, brokers and representatives interviewed in this book discuss their arrival, via state airline, at Hongqiao airport. Situated in the middle of the countryside and surrounded by paddy fields, the not-too-distant memories tell a vastly different picture to that which we know of modern China, in which skyscrapers and high-speed bullet trains surround that same airport. And today, the Chinese textile and apparel market is worth a staggering \$300 billion as part of China's transformation into a global powerhouse following its decision to open up to the international economy. With 1.4 billion people driving a new consumer culture and an economy growing at more than 7% per year, today it seems the only constant in China is change, but what endures is the country's vast appetite and passion for Australian Merino wool and its deeply committed relationship with Australian woolgrowers.

The first exports of wool to China started more than half a century ago, with some records dating back to the 1920s, and today it is Australia's largest customer, taking on average 75% of its total wool exports. Prior to 1980, Australia shipped less than 10 million kilograms (mkg) greasy each year to China as China's small wool textile industry was largely supplied domestically. Australia has been one of the world's largest producers of wool and boasted one of the largest sheep flocks for decades. However, Australia's exports to China has risen since 1980, with a series of increases and falls driven by events both within and outside China.

The trade has expanded substantially since 1990 when China accounted for only 4% of Australia wool exports. Since 1980, Australia's exports have grown from 21 mkg greasy worth A\$64 million per year to 271 mkg greasy worth A\$2.76 billion in 2017. The peak in the value of Australia's wool exports to China was in 2017. However, the peak volume was reached in 2007 when 283 mkg greasy was exported from Australia to China. At the time, Australia's shorn wool production was at 430 mkg greasy, compared with the current production level of 345 mkg greasy. While China has become the dominant partner for Australia's wool in total over the past five decades, there has also been a significant trend towards China buying more fine and superfine wool from Australia. In 2017, 47% of Australia's wool exports to China was 19 micron and finer wool. This compares with 10% in 2000 and only 3% in 1990.

As new Chinese designer brands emerge and consumer tastes mature faster than anyone had imagined, China's relationship with Australian Merino wool has grown to encompass luxury, designer and mainstream retail, high-tech processing facilities and, above all else, even higher demand for the world's pre-eminent natural fibre. With the country – and its economic and creative output – evolving apace, this year we celebrate more than half a century of a cross-cultural partnership spanning trade, economy and creativity not only by looking back, but more importantly, looking to the future of the Merino wool partnership between Australia and China – an age-old fibre and a technologically-advanced manufacturing industry – that is generating ever-increasing benefits for two countries that enjoy a deep creative, cultural and commercial relationship.

At the 2017 World Economic Forum in Davos, People's Republic of China President Xi Jinping emphasised the need for innovation and international collaboration. "We should develop a dynamic, innovation-driven growth model," he told the forum. "The Fourth Industrial Revolution is unfolding at an exponential rather than a linear pace. Countries have the right to development, but they should view their own interests in the broader context."

With its profound knowledge and experience in the processing of raw fibre, China is set to continue leading consumption of nature's miracle fibre. In line with the Chinese president's philosophy, China and Australia are innovating towards a shared future in Australian Merino wool by developing new wool textiles and manufacturing techniques on a breathtaking scale that offers unlimited potential.

在回忆到当年为推动澳大利亚美丽诺羊毛贸易而远赴中国的经历时，本书采访的众多羊毛生产商、中间商和企业代表几乎都提及他们所乘坐的飞机初次抵达虹桥机场的景象——机场坐落于乡村中间，周围环绕着农田。这些并不算太遥远的记忆所呈现出来的画面迥异于我们现在所熟悉的这个现代化国家——而如今，在这个画面中，环绕当初这座机场的是一栋栋摩天高楼和高速动车。在决定打开国门，拥抱国际经济体系后，如今的中国已然转型成为全球经济巨头，而作为这个转型中的一部分成果，中国纺织品和服装市场价值已高达3000亿美元之巨。在这里，14亿人不断推动新的消费文化，经济以每年百分之七以上的速度增长，于是，似乎在中国唯一不变的就是它始终在变化和发展，而经久不衰的是这个国家对澳大利亚美丽诺羊毛巨大的需求和不减的热情，以及它与澳大利亚牧民不可动摇的坚定关系。

第一次向中国出口羊毛始于半个多世纪前，有些甚至可以追溯到20世纪20年代。如今，中国是澳大利亚羊毛最大的进口国，平均占澳大利亚羊毛出口总量的75%。在1980之前，澳大利亚每年向中国运送的原毛不到1000万公斤，当时还并不成规模的中国毛纺行业主要面向供应国内需求。几十年过去了，澳大利亚已然成为全球最大的羊毛生产国之一，并且拥有世界上最多的羊群。然而，澳大利亚羊毛对中国的出口自1980年以来一直呈现增长趋势，中国的内外事物密切的影响着这一出口量数据的增长和下降。

从1990年开始，中澳羊毛贸易大幅增长，当时中国的羊毛出口仅占澳大利亚羊毛出口的4%。自1980以来，澳大利亚羊毛的出口量从每年2100万公斤（价值6,400万澳元）增长到了2.71亿公斤（价值27.6亿澳元）。澳大利亚对中国的羊毛出口总额在2017达到顶峰。然而，出口总量的高峰却出现在2007，当年有2.83亿公斤的原毛从澳大利亚出口到中国。当时，澳大利亚的短羊毛产量为4.3亿公斤，而目前的产量为3.45亿公斤。在过去的50年里，中国已成为澳大利亚羊毛产业的主要合作伙伴，然而在所呈现的趋势中发现，中国市场购买细羊毛或是超细羊毛的趋势正在迅速增长。2017年，澳大利亚对华羊毛出口总量的47%是19微米抑或是更细的羊毛。2000年和1990年，这一比重分别为10%和3%。

随着中国设计师品牌的涌现以及消费者品味成熟的速度之快，中国与澳大利亚美丽诺羊毛的关系已经发展涵盖到包括奢侈品、设计师和主流零售、高科技加工设施等，所有的现象和趋势都表示中国对世界上最卓越的天然纤维正呈现前所未有的高涨需求。随着国家及其经济和创意产业的迅速发展，今年我们将要庆祝这一经历半个多世纪，跨越文化、贸易、经济和创新的历史性合作，不仅通过回顾，更重要的是，澳大利亚和中国通过美丽诺羊毛这一古老但又高科技的纤维被紧密的联系在了一起，美丽诺羊毛和先进的织造业正为两国带来福祉，未来在深入创新、文化和商业方面开创更深的合作关系。

在2017年达沃斯世界经济论坛上，中华人民共和国主席习近平强调了创新和国际间合作的必要性。“我们应当坚持创新驱动，打造富有活力的增长模式，”习近平在论坛上说道。“第四次工业革命是以指数级而非线性速度展开。每个国家都有发展权利，同时都应该在更加广阔的层面考虑自身利益。”

凭借在原料纤维加工处理上的丰富知识和经验，中国必将继续引领对这一神奇天然纤维的加工、制造和消费。顺应中国国家主席所提出的理念，针对澳大利亚美丽诺羊毛，中澳两国正携手创新，以令人惊叹的规模开发新的羊毛织物和制造工艺，进而激发无穷潜力，共同拥抱美好未来。



BEGINNINGS

Born of the land, produced by sheep consuming a sustainable mix of fresh air, sunlight, grass and water, Australian wool is cultivated by generations of the country's woolgrowers, who nurture every step of the growing process to deliver one of the earth's finest and most precious fibres. With some 60,000 wool-growing properties spread from Queensland to the mid-north of Western Australia, Tasmania and the Islands of Bass Strait, Australian Merino wool is grown year-round as an entirely natural fibre. Grazing on extensive grassland terrain, Merino sheep in Australia are free-range animals that roam from the high rainfall areas of the eastern seaboard to the drier pastoral areas of the west and have become an integral part of the iconic Australian landscape. The first sheep to arrive in Australia came with the First Fleet in 1788, about 71 million sheep in total today, and close to three-quarters of Australia's flock being Merino.

生长于澳大利亚,在新鲜空气、阳光、青草和水的持续滋养下成长,澳大利亚羊毛由这个国家一代又一代的牧民培育而成,他们精心呵护并照料生长过程中的每一个环节,为我们奉献出地球上最优质、最珍贵的纤维之一。从昆士兰北部一直到西澳大利亚中北部、塔斯马尼亚和巴斯海峡群岛,广泛分布着大约30,000个羊毛生产牧场,因此作为一种纯天然纤维,澳大利亚美丽诺羊毛可以全年生产。澳大利亚美丽诺羊群被自由放养于广阔的草原,它们在雨水充沛的东海岸地区和更为干燥的西部牧区之间来回迁徙。第一批绵羊在1788年随第一舰队抵达澳大利亚,此后它们成了澳大利亚不可或缺的标志之一。如今这里总共有7100万头绵羊,其中接近四分之三为美丽诺羊种。

The first wool export from Australia was shipped by Australian merchant and sheep breeder John Macarthur in 1807 and within four decades Australia had become the largest producer of wool in the world. By 1950-51 the gross value of wool production had increased to 56% of the total value of production of all Australian agricultural industries and the attendant increase in the price of wool during this period led to a sharp increase in sheep numbers, from 96 million in 1946 to 113 million in 1950. At this time Australia was said to be "riding on the sheep's back" and it was during this period that Australian farmers began exporting their wool to China.

澳大利亚第一批羊毛出口由澳大利亚商人兼牧民John Macarthur在1807发起,随后在短短四十年内,澳大利亚就成了全世界最大的羊毛生产国。1950年至1951年,羊毛生产总值已扩大至占澳大利亚所有农业生产总值的56%。在此期间羊毛价格也水涨船高,导致绵羊数量急剧增加,从1946年的9600万头增长到了1950年的1.13亿头。此时,澳大利亚因此得名“骑在羊背上的国家”,同期,澳大利亚与中国的羊毛贸易就此开始。





CHANGES IN CHINA

The amount of wool processed and sold by Australia increased significantly following the Second World War, with China among the major growth markets. As interest in Australia's premium natural fibre burgeoned, the first official Chinese wool industry delegation visited Australia in 1956. As Australia had not officially recognised Mainland China at that time, the Australian Government was not involved and instead the visit was sponsored by the English, Scottish and Australian Bank, which introduced the Chinese to the workings of the wool industry, through taking them to wool sales in Sydney and on a tour of the Michell Wool processing plant in Adelaide.

Between 1966 and 1976, China's economy went through major upheaval as a result of the Cultural Revolution. Average per capita incomes were low and only 18% of the population lived in urban areas. One positive for the future of Australian trading with China was that Australia established diplomatic relations with the People's Republic of China in December of 1972. This was followed by Australian Prime Minister Gough Whitlam's visit to China in October of 1973. Although the liberalism of the 1960s meant more progressive politics and social attitudes in many countries, visits to China were still not permitted and wool trade negotiations instead took place at the twice-yearly Canton Trade Fair – not that it was any easier to get there.

"To today's visitor to Canton (Guangzhou) the entry problems of the 1960s would sound impossible," says Ian K Mclvor AM, who visited Canton twice-yearly as a wool buyer specialising in the Southern markets. Firstly, visitors such as Mclvor had to apply for an invitation to attend from a contact organisation in China, after which they proceeded to Hong Kong, where they applied for a visa at the China Tourist Centre. They then had to wait two to three days until the visa was issued, before taking the train to Lo Wu and entering China. "At this stage, your passport and luggage were taken from you, a hotel room was allocated and you were issued with a ticket on the next train to Canton," says Mclvor.

On arrival in Canton a bus dropped people at an allocated hotel, where their luggage had been delivered to your room, but even once they arrived, travel in Canton was difficult due to the presence and influence of the Red Guards, who restricted movements and accompanied bus journeys to and from the fair. Everything improved significantly after Australia's recognition of China in 1972 and a period of economic liberalisation under People's Republic of China leader Deng Xiaoping, who also modernised the industries of agriculture, science and technology.

1978 saw the most significant event for China's economy and for the future development of the wool textile industry in China. This was the agrarian reforms introduced by Deng Xiaoping. Under these reforms, the organisation of farming was decentralised to household level, and households could choose what crops and livestock to grow. They could also sell any production above state quota in the free market. In addition, the first Special Economic Zones were established on the east coast. These reforms heralded the opening and invigoration of the Chinese economy. The Chinese Government maintained tight control on the imports of wool, although there was some growth in exports of Australian wool to China in this period. China's imports lifted by 40% in 1981 and doubled in 1982 (from a low base), then fell back in 1983 and 1984.

二战后,澳大利亚羊毛的生产和销售大幅增加,而中国是其主要的增长市场。随着对澳大利亚羊毛这一优质天然纤维的兴趣激增,中国毛纺行业第一支官方代表团于1956年造访澳大利亚。由于当时澳大利亚还未官方正式承认中国大陆,澳大利亚政府并未参与其中,这次访问是由英苏澳银行(English, Scottish and Australian Bank)主办,他们带领中国代表团参观了悉尼的羊毛销售市场以及阿德莱德的 Michell 羊毛加工厂,借此让中国毛纺人初步领略到了澳大利亚羊毛行业的运作方式。尽管1960年代的自由主义潮流对很多国家意味着更加进步的政治和社会态度,但访问中国依然是不被允许的,羊毛贸易谈判只能转而借两年一次的广交会上进行,然而这对当时的情形而言也并非易事。

“对于今天去广东(广州)的游客来说,1960年代的入境问题听上去就像天方夜谭,” Ian K Mclvor AM表示,他曾作为专攻南方市场的羊毛买手一年两次造访广东。首先像Mclvor这样的外国人必须从中国某个联络机构申请参会邀请函,然后转道香港,在那里向中国旅游中心申请签证。随后在接下去的两三天等待签证的发放,然后坐火车从罗湖口岸进入中国。

“在此阶段,有人会拿走你的护照和行李,给你分配一个酒店房间,然后给你一张前往广东的火车票,” Mclvor说。

抵达广东后,一辆汽车会把大家统一送到指定的酒店,此时行李已经被送至各自房间。然而就算到了广东,因为红卫兵的存在和影响,在这里旅行也是困难重重,红卫兵会限制人员行动并随同你乘坐汽车往来广交会。

随着澳大利亚于1972年承认中国,以及中国在邓小平领导下进入经济自由化时期,一切都大为改观,农业、工业和科技也随之开始现代化。

1978是关乎中国经济和中国毛纺织工业未来发展最重要的一年。在这一年中,邓小平提出了土地改革。在这一改革背景下,中国的农村实行了“家庭联产承包责任制”,农民可以自由选择作物和牲畜来种植或养殖。他们也可不受国家配额的约束,在自由市场上出售自己种植或养殖的产品。除此之外,还在东海岸建立了第一个经济特区。这些改革预示着中国经济的开放和振兴。那段时期,中国对进口羊毛仍然保持着严格控制,尽管当时澳大利亚羊毛对中国的出口有所增长。1981年,中国进口羊毛增长达到40%,第二年这一数字再增长了一倍(基数较低),而后1983和1984年间进口增长率又再次回落。

1986年, 澳大利亚总理Robert Hawke在澳中商会会员以及包括Mclvor在内的羊毛行业代表的陪同下访问了中国, 澳中关系得到了进一步巩固。所谓澳中羊毛计划推动了更加频繁的合作和技术交流, 澳大利亚羊毛行业特别工作小组也因此多次到访中国, 并在羊毛知识和技术方面为中国企业出谋划策。“直到此时, 仍无澳大利亚行业代表派驻中国, 不过随着羊毛相关企业员工赴华交流的不断增加, 这也随之发生了改变, 多家澳大利亚羊毛企业在中国设立了办事处或地方代理人和代表,” Mclvor说道。

Relations between Australia and China were further bolstered in 1986 when Australian Prime Minister Robert Hawke visited China accompanied by members of the Australia China Business Council and wool industry representatives, including Mclvor. The so-called Australia China Wool Initiative resulted in increased co-operation and technical exchanges, as well as several visits to China by an Australian Wool Industry Task Force, which advised the Chinese on working with wool. “Until this time there had not been any Australian industry representatives located in China, however with an ever-increasing presence of Wool Corp staff and initiatives in China this changed, and several Australian wool industry companies established offices or local agents and representatives there,” says Mclvor.

China introduced further economic liberalisation during the period between 1984 and 1988, including freeing up pricing and wage setting by state-owned enterprises. It also decentralised state control to provinces. This encouraged a significant growth in rural township enterprise wool textile mills in the 1980s. This in turn led to the ‘Wool Wars’ in China between 1985 to 1988. Provinces fought to secure wool for their increasing early stage processing capacity. Domestic wool prices rose dramatically. The rigid controls on wool imports broke down and many different agencies entered the wool-importing business (with or without official approval). As a result of the Wool Wars and relaxation of controls on wool imports, Australia’s exports of wool to China rose rapidly. Wool exports almost quadrupled in 1985, with further increases in 1986 and 1987.

On the global stage, the world economy was flourishing. This, combined with strong buying of wool by the Soviet Union, saw demand for wool boom. The Australian stockpile, which had built up in the early 1980s, disappeared very quickly and wool prices surged to the highest ever levels by April of 1988.

The late 1980s in China saw the beginning of Government reforms of State-Owned Enterprises (SOEs). This drove a surge in investment by these enterprises, but a lack of macroeconomic management instruments fuelled high inflation. At the time there was upheaval in Communist countries throughout Europe. The Tiananmen Square protests in 1989 were in part in response to the extreme inflation and extensive corruption and may have been encouraged by unrest in other Communist countries. The Chinese Government responded by reinstating controls on imports and on prices.

The crack-down led to the ‘wool depression’ in China triggered by the June 4 Tiananmen Square incident. A crack-down on illegal traders and other measures resulted in a build-up of raw wool stocks of domestic wool in China. By the end of 1989 there was 120mkg of stocks held which built further to a peak of 143mkg in 1990. At the same time, the Government reasserted centralised control over wool imports in 1989. For example, the wool import quota in 1990 was only 45mkg. As a result of the stricter controls on imports and the low import quota, Australia’s exports to China fell by 60% in 1989 and a further 24% in 1990.

The global economy slumped in the early 1990s, which further hit raw wool demand. This and the upheaval in the USSR and the eventual dissolution of the Soviet Union in 1991 meant that Australia experienced a massive drop in demand for its wool. The Reserve Price Scheme collapsed in 1991 and Australia was left with a stockpile of 4.7 million bales of wool – more than a season’s worth of production. This stockpile would need to be sold over the next decade to repay the debt to the Australian Government.

Two years after the crackdown and re-imposition of state controls on the economy, China once again began to reform its economy. In 1992, the Communist Party formally embraced Deng Xiaoping’s view that the market system was not incompatible with ideals of socialism and established the “socialist market economy”. This encouraged the growth of the township enterprises which started to gain share (these were notionally owned by local governments but were effectively private).

The government deregulated the wool markets in China in 1992. This, plus improved demand, led to a clearing of the excess stocks in China. There was a de-facto freeing up of the wool import regime, with some mills better able to exploit the de facto arrangements than others). Import quotas were not restrictive with CHINATEX and its subsidiary organisations (China Resource Textile Corporation, Nam Kwong and CHINATEX Sydney) buying for mills. Provincial agencies also bought for mills. As a result of these changes, Australia’s exports to China jumped between 1991 and 1994, tripling in 1991 and increasing by 25% in each of 1992 and 1993. This helped push wool prices in Australia up sharply in 1993 and 1994. At the end of this period, the Asian Financial Crisis hit in 1997, bursting a credit bubble and causing major upheaval in the Asia-Pacific. This led to a slide in Australia’s exports of wool to China and also a drop in wool prices in Australia.

The period between 1998 and 2005 was pivotal for the development of China’s economy and its eventual dominance as Australia’s premier trading partner in wool. Within China, there was large-scale privatisation of SOEs, with many liquidated and sold off. As well, the banking system was reformed and lower trade barriers and tariffs introduced. A key was China becoming a member of the World Trade Organisation on 11 December 2001. This meant that quotas on textiles and clothing imports from China by the United States and Europe were eliminated, as part of the Agreement on Textiles & Clothing. As a result, China’s exports of wool clothing to the United States and, in particular, to the European Union surged. This helped boost the investment in wool textile mills, from early stage processors to garment makers.

On joining the World Trade Organisation, China introduced tariff rate quotas for the import of raw wool and wool top. This provided much clearer arrangements for Australia’s exports of wool to China. Australia’s exports of wool to China lifted by 31% in 1999 and by 45% in 2000. After rising marginally in 2001, the SARS outbreak in China between 2002 and 2004 triggered a sharp fall in Australia’s exports to China. In part this was due to Government restrictions on imports of raw animal products and on the movement of people. Australian wool exports fell by 20% in 2002 and by 32% in 2003. Once the restrictions were lifted, Australia’s exports jumped by 63% in 2004.

The global economy went through a dip in 2001 as the ‘dot com’ bubble burst in advanced economies and in the wake of the September 11 terrorist attacks in the US. By 2004, the world economy was growing at a fast 4.4% annual growth rate.





China continued to reform its economy. The government removed the hard peg of the renminbi to US\$ and replaced it with a peg to a trade weighted basket of currencies. Monetary policy was also very loose, which led to property speculation and fast rising housing prices. By now, Australian wool production and supply was very constrained. Despite excess capacity in early stage processing in China, Australia's exports of wool to China was between 250–280mkg greasy, with some year-to-year fluctuations depending on the stocking and destocking decisions by mills.

Internationally, this period was dominated by the Global Financial Crisis in 2008 and 2009. Global economic growth slumped in 2008 and then went backwards in 2009 as the world entered a severe recession. The severe drought across Australia continued until 2010 before there was some relief in 2011 and 2012. In April of 2011, cotton prices hit their highest level since the US Civil War. This pushed the prices for all textile fibres to high levels, including wool. As well, the Australian dollar rose rapidly to US\$1.10 in July of 2011, the highest level against the US dollar since it was floated in the early 1970s. This made Australian wool more expensive for Chinese mills than it had ever been.

The Chinese economy is now moving away from the "import raw material-manufacture-export" base to a more mature economy based on domestic consumption. This means that the annual economic growth rate is moderating, but it also presents an opportunity for Australian wool to grow through sales of finished wool product in China. China is already the world's largest wool consuming country at retail, but there is potential for this to grow further. China's population is increasingly urbanised, with a rising number of people in the middle-income segment. In 2016, almost 57% of the population was urban-based, up from 18% in 1968, 22% in 1988, one-third in 1998 and 43% in 2005.

After several years of weak growth as the advanced economies struggled to recover from the GFC and the subsequent Euro-debt crisis in 2013, world economic growth is once again accelerating. It grew at 3.7% in 2017 and is expected to grow at 3.9% in 2018. This has helped demand for raw wool and Australian wool prices hit record levels in early 2018.



THE NEW CHINESE FASHION CONSUMER

As Australian Merino wool fuelled the factories throughout China, the finished high-end garments that were previously made for export began to find a domestic market thanks to the birth of a new Chinese fashion consumer. A taste for luxury and fashion was starting to emerge, along with an awareness of international brands that intensified following the launch of *Vogue China* in 2005. Initially, a true knowledge of global luxury was limited to Chinese who had lived or worked overseas, but soon the market ignited and grew at an astonishing pace. *Vogue China* took a leadership role in educating consumers and expanding demand for luxury goods and today it is considered one of the most successful international editions of *Vogue*.

随着澳大利亚美丽诺羊毛作为原材料进入到中国各地工厂,以及得益于新一代中国时尚消费者的诞生,之前专攻出口的高端成衣品牌开始有了国内市场。中国消费者的时尚品味渐渐显露,国际品牌也随之觉醒,于2005年创刊的《VOGUE服饰与美容》更增进了这一趋势。最初,真正了解全球奢侈品的消费者仅局限于在海外工作和生活的中国人,但很快奢侈品在中国市场萌发并以惊人的速度发展壮大。《VOGUE服饰与美容》在教育消费者及扩大对奢侈品的需求方面一马当先,如今它被认为是最成功的《VOGUE》国际版之一。

Helmed by Angelica Cheung, who remains the title's highly respected editor-in-chief today, *Vogue* China was built from scratch to become one of *Vogue's* most dynamic global titles by Cheung together with Australia's Nancy Pilcher, who was then the Vice President, Editorial Development, of Condé Nast Asia-Pacific. Credited as being responsible for Condé Nast's success in China, particularly with the spectacular launch and growth of *Vogue* China, Pilcher says her experience reflects the opportunities and challenges of doing business in China, the world's largest and fastest-changing market.

张宇女士是《VOGUE服饰与美容》备受尊崇的主编，在时任康泰纳仕亚太区编辑发展部副总裁的澳大利亚人Nancy Pilcher协助下，她带领《VOGUE服饰与美容》从零开始，发展为当今最具活力的《VOGUE》全球版之一。外界认为Pilcher成就了康泰纳仕在中国的成功，尤其是《VOGUE服饰与美容》的盛大创刊和辉煌发展，她表示她的经历映射了在中国这个全球最大且瞬息万变的市场开展业务的机会和挑战。

"China, out of all the magazines that I launched, was the biggest challenge," says Pilcher. "The problem was that there were no fashion editors, there were no stylists; they didn't know about magazines." Once Pilcher had assembled her team, the next challenge was convincing western photographers and models to work with them. "It was terrible to try and get top calibre photographers that we wanted; no one wanted to shoot for the magazine," she says. "We would get turned down and turned down. It was this whole job of trying to make it cool to the fashion people; making it relevant for fashion people. It took 15 years to get them to really realise what was going on."

Pilcher had her first exposure to the challenges of doing business in China when as the editor-in-chief of *Vogue* Australia she did a shoot in China celebrating Australian wool in Tiananmen Square and other locations around Beijing. "We were one of the first magazines to do any fashion photography in China, so it was quite an experience to see all these things just after it had opened up," says Pilcher. "The Wool Board negotiated with the Chinese Government and so we really had a carte blanche to shoot wherever we wanted to shoot. Every day we would have a busload of Chinese people following us wherever we went, just to watch what we were doing."

"中国版，在我参与创刊的所有杂志中，是最大的挑战，"Pilcher称。"当时的问题是根本没有时尚编辑，没有造型师；他们对杂志一无所知。"在Pilcher组建好一支团队后，接下来的挑战是说服西方摄影师和模特与他们合作。"与我们想要合作的顶级摄影师接洽的过程简直是场噩梦；没人想为这本杂志拍照，"她说。"我们一次又一次被回绝。全部的精力都用来如何努力使它时尚人士产生吸引力。我们花了15年时间让所有人真正意识到究竟发生了什么。"

Pilcher第一次直面在中国开展业务的挑战是在她担任《VOGUE Australia》主编的时候，当时她在天安门广场和北京其他地方拍摄一组大片来推广澳大利亚羊毛。"我们是在中国拍摄时尚大片的第一批杂志，作为始作俑者随后发生的一切真是难得的体验，"Pilcher说。"Woolmark与中国政府进行了谈判，于是我们拿到了通行证，想去哪儿拍就去哪儿拍。每天无论去哪儿都会有一大群人跟随，只为了看看我们到底在干什么。"

THE NEW CHINESE DESIGNERS

Until recently, China's fashion consumption market was dominated by the big luxury brands and their logos, but as a more sophisticated and nuanced Chinese consumer has emerged so too have home-grown designer brands. Uma Wang and Guo Pei show on the official schedule of Paris Fashion Week and Paris Haute Couture Fashion Week respectively, while Comme Moi, Doris Q, VMajor and Ban Xiao Xue are among the labels who are working together with The Woolmark Company to take a message of Chinese design and quality to the world.

直到最近,中国的时尚消费市场仍由那些奢侈大牌牢牢把持,但随着中国消费者日渐成熟化、差异化,本土设计师品牌也随之开始涌现。王汁和郭培分别出现在巴黎时装周和巴黎高定时装周官方日程上,而CommeMoi、Doris Q、VMajor和Ban Xiao Xue等品牌正通过与The Woolmark Company的合作,让世界认识中国设计与品质。





Luxury menswear in China is particularly strong, with TRANDS, UPPER and Beautyberry showcased in 2017 during the launch in Beijing of the Woolmark Gold collection, which celebrates excellence in tailoring using the finest Australian Merino wool cloths and are increasingly being used by Chinese designers to start their own brands. VMajor's Victor Zhu, a finalist in the 2015 International Woolmark Prize held in Beijing, says Chinese factories are now much more willing to work with smaller, emerging local labels such as his as well as behemoth international brands. "Before, the factories were manufacturing for the western world, but now they are starting to change and are open to working with emerging Chinese designers," he says. "They are beginning to try something new and are willing to work with creative ideas, not just to always be the same."

A more established brand is Icicle, which recently worked with The Woolmark Company on a capsule collection celebrating the brand's 20th anniversary, accompanied by a campaign shot on a wool-growing property in Australia. Similarly, Comme Moi founder Lu Yan visited Australia in early-2018 to launch her brand into the Australian market. With four stores throughout China and another six due to open in 2018, Yan, who is a long-term partner of The Woolmark Company, is a prime example of how Chinese brands are making a mark on global fashion. "China has one very good quality: we are learning very fast," says Yan. "People used to think Chinese fashion was just about copying, but Chinese people now know exactly how to run a brand like western people. The Chinese fashion media is now quite strong, so they can push brands, and I really think Chinese designers are only just starting."

男装奢侈品牌在中国尤为强势, 创世、雅派朗迪和Beautyberry在2017年亮相北京“金羊毛标志”系列发布会, 系列使用最优质的澳大利亚美丽诺羊毛面料配以精湛的剪裁技艺。2015年的北京, 国际羊毛标志大奖(International Woolmark Prize)全球总决赛入围者——VMajor的Victor Zhu朱威特)称中国工厂现在除了与国际品牌巨头的合作, 也不再排斥他这样的本土小型新锐品牌。“以前工厂都是为西方市场生产, 但现在他们开始改变, 在与崭露头角的中国设计师合作上持开放态度,” 他说。“他们开始尝试新鲜事物, 愿意共同推动创新想法, 不再一成不变。”

之禾(ICICLE)是一个非常成熟的品牌, 品牌近期为庆祝其创立20周年与The Woolmark Company合作推出胶囊系列, 并远赴澳大利亚羊毛牧场拍摄了一组宣传大片。类似地, Comme Moi品牌创始人吕燕在2018年初造访澳大利亚, 希望将她的品牌推向澳大利亚市场。吕燕及其个人品牌是The Woolmark Company的长期合作伙伴, 目前已在中国开设了四家直营店并计划在2018年再开设六家, 她是中国品牌开始涉足全球时尚界的最佳范例。“中国有一个非常好的特点: 我们学得很快,” 吕燕说。“人们过去往往认为中国时尚不过是抄袭, 但中国人现在很清楚如何像西方人一样经营一个品牌。中国时尚媒体现在已经相当厉害, 他们有能力助推品牌成功, 而且我确实认为中国设计师只是刚刚开始起步。”



INNOVATION IN DEVELOPMENT & RESEARCH

As China stakes its claim as one of the world's most dynamic fashion capitals, it has also become the global centre for wool development and research thanks to the Wool Development Centre in Shandong Province and the Wool Resource Centre in Hong Kong. The Wool Development Centre was established in 2014 to develop innovative, high-value woven fabrics produced from Australian Merino wool. It is co-funded by The Woolmark Company and one of China's leading woollen textile enterprises, The Nanshan Group, and also functions as a training base to foster professional talent in the wool textile industry.

伴随中国跻身世界最具活力的时尚重镇的坚定步伐,也逐渐成为全球羊毛研发的中心,其中位于山东的羊毛研发中心和香港的羊毛创意资源中心做出了巨大贡献。羊毛研发中心成立于2014年,目的是开发以澳大利亚美丽诺羊毛制成的高附加值创新梭织面料。它由The Woolmark Company和中国领先的毛纺企业之一南山集团共同创立,同时也是毛纺行业专业人才的培训基地。

The Woolmark Company's technical team, based in Shanghai, works alongside The Nanshan Group to undertake trials for the development of new fabrics based on the latest marketing trends. As a result, the trials can successfully produce sample fabrics quickly and affordably, allowing for major breakthroughs in fabric developments that are designed directly in response to market needs. "Since the Wool Development Centre opened it has enabled our design and product development team, working closely with The Woolmark Company's technical team, to not only swap and develop ideas, but to very quickly check them out," says General Factory Director of Nanshan's Fabric and Garment division Mr Cao Yiru.

The opening of the Wool Resource Centre was completed two years later in Hong Kong in 2016. A global hub for apparel and textile industries to discover the benefits and versatility of Australian Merino wool, the centre includes a library, a showroom and an events space and is located in the Kowloon Tower Landmark East building. A multi-functional, interactive space dedicated to product and process innovation, the Wool Resource Centre can be used by The Woolmark Company's partners throughout the supply chain: designers can find inspiration and touch and feel the latest and greatest in wool; supply chain partners can showcase their product or host a launch; and woolgrowers can use the centre for industry presentations.

Hong Kong was selected as the home of the Wool Resource Centre due to its importance as a global hub for brands sourcing Australian Merino wool, and the region is also a key manufacturing hub for knitters and spinners. To close the circle of research and development, the excellence of their work is recognised in the Australian Merino Wool Best of China Awards, which are held each year in Shanghai. A partnership between The Woolmark Company and the China Wool Textile Association, the awards recognise Chinese textile companies excelling across a range of 10 categories and aim to promote China's wool textile industry to the world.

The Woolmark Company上海办公室的技术团队与南山集团通力合作,根据最新市场趋势开展新面料研发试验。试验能成功地以较低成本快速生产样品面料,即根据市场需求,直接设计面料并投入研发,这对于整个毛纺行业而言无疑是一重大突破。“自羊毛研发中心设立以来,它推动我们的设计及产品开发团队,通过与The Woolmark Company技术团队密切合作,不仅能集思广益,还可以非常快速地对这些想法进行检验,”南山集团精纺厂总厂长曹贻儒说道。

羊毛创意资源中心则是在两年后于2016年创立于香港。这个中心是供服装和纺织行业探索澳大利亚美丽诺羊毛优点和多样性的一个全球中枢,它位于友邦九龙大厦城东志,包括一间图书馆、一个展示厅和一处会场。羊毛创意资源中心是一个专门面向产品及工艺创新的多功能互动空间,可供The Woolmark Company产业链中各环节的合作伙伴使用:设计师可以在此寻找灵感,触摸并感受最新最出色的羊毛产品;供应链合作方可以在此展示他们的产品或举办发布会;羊毛生产商则可以利用该中心举办行业展示活动。

香港是各品牌采购澳大利亚美丽诺羊毛的全球枢纽,并且也是编织机和纺纱机的重要制造中心,正因为这种重要性,香港被选为羊毛创意资源中心所在地。为了表示对研发的重视,每年在上海所举办的澳大利亚美丽诺羊毛中国羊毛大奖会对表现出色的上游企业进行表彰。这是The Woolmark Company和中国毛纺织行业协会的一个合作项目,奖项旨在表彰10个类别中表现最出色的中国纺织企业以及向世界宣传中国的毛纺行业。



NEW WORLD WOOL

As China has consolidated its position as one of the essential engines of the global economy, so too has the country cemented its relationship with Australian Merino wool. Since the first Australian Merino wool exports to China began in the early 20th century, the natural fibre has become a pillar of China's apparel industry, both in the manufacturing and the consumption of garments, and the relationship between Australia and China has subsequently deepened. "That long involvement over the past 50 years and that great relationship of creating quality woollen products has worked really well for the Australian woolgrowers," said woolgrower Sydney Lawrie. "It's so important to be involved with China and they're so positive about the Australian wool industry; I think it's got a massive future. With their growing population, we can continue to take that forward and grow with them."

随着中国逐步巩固其作为全球经济重要增长引擎的地位,它与澳大利亚美丽诺羊毛的关系也同样愈加稳固。自20世纪初澳大利亚美丽诺羊毛开始出口中国以来,这种天然纤维已经成为中国服装业的支柱之一,在服装生产和消费这两个领域都是如此,并且澳大利亚和中国的关系也随之得到深化。“过去50年的长期投入,以及双方通过共同创造优质羊毛产品所建立的良好关系,使澳大利亚羊毛生产商从中受益良多,”羊毛生产商Sydney Lawrie说。“参与中国市场非常重要,这对澳大利亚羊毛业有非常积极的意义;我认为未来不可限量。随着中国人口不断增长,我们能够继续向前迈进,与之共同发展。”





As that population continues to swell and cultural, creative and commercial ties between the two countries have strengthened, the unique bond between an ancient fibre and a future-facing China has spawned countless individual stories of business and friendship across half a century of trade. The next chapter of the overarching narrative is now being written by a new generation of young Australian and Chinese fashion designers who are eager to build on the ties between the two countries first forged 50 years ago. China, for example, is the largest growth region in Asia for Australian designer Dion Lee, whose eponymous brand is enjoying greater sales increases there than anywhere else in the world. “They’ve been hugely supportive of the brand and the customer is really responsive to the product throughout the region,” says Lee. “It’s definitely something that we’re looking to support further.”

Designer Chris Ran Lin, who was born in China and now lives in Melbourne, says China is the holy grail for any fashion designer wanting to make an impact. “China is a huge market for fashion designers,” he says. “When you consider the population and economics, there is the potential for Australian designers to really grow and step into the market over there.” In January 2017 he produced a range in collaboration with Lane Crawford Hong Kong that successfully sold in Beijing, Shanghai, Chengdu and Hong Kong and he is keen to further build his brand in the region. “I’m slowly introducing my label into the Chinese market,” he says. “As a young designer from here [Australia] it’s amazing to be able to present something quite new over there [China]. I would like to develop a connection in the future that’s stronger, as I can see the future is in China.”

随着人口继续膨胀,两国间的文化、创新和商业关系得到加强;古老的纤维与欣欣向荣的中国之间结成了一条独特的纽带,并且在半个世纪的贸易往来中,孕育出无数个有关生意和友情的动人佳话。中澳两国的时装设计师现在正为这个宏大故事写下新的篇章,他们渴望增进两国早在50年前结下的纽带。例如,中国对澳大利亚设计师Dion Lee而言是亚洲最大的增长区域,他的同名品牌在中国的销售增长率超过世界其他地方。“中国市场为品牌提供了巨大支持,中国的客户对我们的产品很有共鸣,”Lee说。“我们会对此进一步加以支持。”

在中国出生、现居于墨尔本的设计师Chris Ran Lin说,中国是所有心怀梦想的时装设计师梦寐以求的地方。

“中国对时装设计师而言是一个巨大的市场,”他说。“考虑到人口和经济状况,有巨大潜力可供澳大利亚设计师前往发展并获得市场份额。”2017年1月,他与香港连卡佛的合作系列在北京、上海、成都和香港成功发售。他渴望在这个市场进一步壮大自己的品牌。“我正在慢慢把我的品牌介绍给中国市场,”他说。“作为从澳大利亚走出去的年轻设计师,能在中国尝试一些新想法、新产品真是太棒了。我希望未来能形成更稳固的关系,因为我可以看到未来属于中国。”

