

# The broader view

MARCH 2023 | FOR NON-MERINO WOOLGROWERS







# The broader view

THE BROADER VIEW is published annually by Australian Wool Innovation Ltd (AWI), a company funded by Australian woolgrowers and the Australian Government. The Woolmark Company is a subsidiary of AWI.

**AWI is the R&D and marketing organisation for the Australian wool industry.**

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This publication includes some content sourced from AWI's quarterly BEYOND THE BALE magazine. Beyond the Bale is a key medium that AWI uses to communicate directly with Australian woolgrowers and wool industry stakeholders about AWI activities and AWI investments in R&D and marketing. Visit [wool.com/btb](http://wool.com/btb) to view an archive of past editions online. Each new edition of Beyond the Bale is available FREE via email. Subscribe at [www.wool.com/subscribe](http://www.wool.com/subscribe)

## AWI STATE-BASED GROWER NETWORKS

AWI-supported networks are present in each state.

- Sheep Connect NSW
- Sheep Connect SA
- Sheep Connect Tasmania
- BESTWOOL/BESTLAMB (VIC)
- The Sheep's Back (WA)
- Leading Sheep (Qld)

Find your grower network at [www.wool.com/networks](http://www.wool.com/networks) or call the AWI Helpline on 1800 070 099.

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**Here AWI CEO John Roberts provides an update for non-Merino woolgrowers about the current market for wool and AWI's work to help increase the demand for their fibre through investments in marketing and R&D.**

## MARKET FOR WOOL ANTICIPATED TO STRENGTHEN

COVID has left a damaging financial legacy, with many of our markets having experienced challenging economic conditions during 2022, made worse by the conflict in Ukraine and rising energy costs. The largest market for Australian wool, China, has had its own COVID issues, with its strict COVID suppression measures having caused logistic issues as well as a dampening of domestic consumer spending during 2022.

All these issues affected the price that woolgrowers received for their wool during 2022. The run of poor prices for the broader microns post-COVID has regrettably continued. Prices of broad wools remained largely static throughout 2022, and we are still waiting for them to recover from their COVID related slump. The poor prices for broad wools have not been restricted to Australia but have been a global phenomenon seen in many other wool producing nations across the world.

In good news, 2023 has started brighter. There are forecasts of more positive global economic conditions – and the relaxing of COVID-related lockdowns in China has laid a good foundation, with consumer confidence and market growth expected to improve significantly in the country during this year. Previous logistic issues that had been hindering processing/manufacturing and shipping have also diminished.

Our network of offices across the world are reporting improved conditions for wool sales and there is a real sense that 2023 will be a better year than 2022. Importantly, the EMI has started strongly this year which is encouraging and hopefully a positive sign for all microns going forward.

The trend towards sustainability in the textile industry is only getting stronger – and as a natural, renewable and biodegradable fibre, wool of every micron is well placed to take advantage. We have had strong and positive results from our environmentally focused global campaign in which we highlight to consumers that synthetic fibres are made from oil. The campaign urges consumers to consider

# AWI WORKING FOR WOOLGROWERS

the fibre composition of a product when they are thinking of making a purchase – and choose wool. This applies not just to clothing products, but equally to interiors products.

Wool can play an increasingly large role in homes and offices, in products as far ranging as upholstery, curtains, bedding, rugs, lighting, artworks and decorative objects. The consumer trend towards health and wellness is another big trend that plays in favour of *all* wool. With its luxurious finish, easy-to-care-for nature and health properties, wool is the natural choice for any interior.



## MARKETING ALL AUSTRALIAN WOOL

AWI's marketing of Australian wool, irrespective of the micron, is beneficial to the demand for all wool including broader wools. For example, our marketing of wool's eco-credentials, its breathability, fire resistance and anti-odour properties applies to all Australian wool: broad, medium and fine.

The Campaign for Wool has been instrumental in promoting the natural and sustainable benefits of all microns of wool to consumers. It is helping to reconnect markets with the fibre's wide variety of uses including interior products as well as apparel and accessory products.

Similarly, many of our educational initiatives, such as the Woolmark Learning Centre and Learn About Wool programs, provide resources to textile professionals and students about the broader as well as finer microns.

Each season, The Wool Lab sourcing guide to the world's best commercially available wool

fabrics and yarns contains several themes, one of which often relates to interior textiles. For example, one of the six themes for the Autumn/Winter 2023/24 season was titled 'Interiors', and featured swatches suitable for a wide range of interior products. It is helping to inspire brands' material strategies and forge strong relationships within the supply chain, thereby increasing the demand for your wool.

Many of our Woolmark licensees manufacture and sell products made from broad wool (such as bedding products and floorcoverings) and use the Woolmark logo in their marketing activities. We currently have about 140 Woolmark licensees that market interior textile wool products with the help of the Woolmark brand. These companies are located worldwide, from right across Europe, through Asia to the Americas and here in Australia.

## ON-FARM R&D AND EXTENSION

AWI's on-farm R&D and extension projects largely benefit all Australian woolgrowers, irrespective of the breed of their sheep and micron of their wool.

We continue to invest in areas that producers have told us are important to them. Shearing is the number one issue facing many woolgrowers and AWI is doubling down on efforts to tackle the problem. We are doing this by running extra novice and improver shearer training courses to draw new entrants into the industry and retain those already in it. We are also helping roll out the modular race delivery system that eliminates the catch and drag by delivering sheep directly to the shearer. In addition, we are investigating robotics and working on improving biological defleecing. All these initiatives aim to make the harvesting process quicker and physically easier.

Most of our other on-farm R&D projects also benefit growers of broader micron wool, including projects aimed at optimising sheep health and welfare; combatting wild dog, fox and feral pig attacks; increasing the reproductive efficiency of ewes, and harnessing opportunities for on-farm automation.



**John Roberts**  
Chief Executive Officer  
Australian Wool Innovation

In addition, we deliver practical training programs through our extension networks in each state to increase producers' adoption of best practice on-farm production and management. We also provide timely market intelligence to woolgrowers, hold many face-to-face industry events, and we run projects to encourage the next generation into the industry. You can read about these and other on-farm R&D and extension programs on pages 4-5.

## STRATEGY FOR THE FUTURE

The 10-year strategy for Australian woolgrowers, 'Wool 2030', released in December 2020, includes activities to "develop new products, for wools *of all microns*, that build on wool's strengths, in conjunction with commercial partners" and "grow the presence of Australian wool *of all microns* in markets (geographical and by segment) that deliver the highest returns".

Furthermore, consultation and engagement with woolgrowers and stakeholders from all sectors of the industry remain a priority for AWI. To help enable this, a broad wool representative is one of the members that comprise AWI's Woolgrower Industry Consultation Panel (WICP).

I provide you with my assurance that AWI, your R&D and marketing company, will continue to operate for the benefit of all woolgrowers and continue to deliver results for all woolgrowers.



# MARKET INTELLIGENCE

In this edition of *The Broader View*, we look at Australia's supply of non-Merino wool and the prices received in the broad wool segment.

## Production

The Australian Wool Testing Authority (AWTA) key test data shows that at the start of March 2023, 19.1% of all wool tested in the 2022/23 season was broader than 23.5 micron. This is a fast-growing increase in the percentage of wools being produced in the crossbred area of the micron profile of the Australian wool clip and a substantial volume compared to just four months ago when the percentage was as low as 14% by weight of all wool tested. The data is now very much matching the ongoing rhetoric of a shift towards crossbred wool type for a protein/meat-based supply priority.

NSW is the largest growing state of wool that is greater than 23.5micron, but very closely followed by Victoria. The South Australian coastal belt regions produce some handy volumes, but production is negligible in all other states. The crossbred wool type that is now being produced across a large volume of the greater than 23.5 micron sector is very much inferior to what Australia used to produce prior to the introduction of the composite breeds.

This composite type is becoming an increasingly popular sheep type, particularly in NSW and Victoria where almost 80% of the broader than 23.5micron wool type segment is produced.

The wool characteristics of a growing proportion of the modern composite crossbred wool type is struggling to find a use in the textile world.

The "wool" being shorn off these composite types is unique and akin to more of a hair fibre. It vaguely resembles an overlong downs type but contains a high propensity of kemp, medullated and dark fibres and lacking the sponginess or air trapping (insulating) qualities required for bedding uses that our proper downs wools provide.

Composite wool is generally too long to be considered for quilt/duona manufacturing and contains far too many straight and harsh fibres that can punch through the cotton/cotton-polyester cover.

Just a few years back, Australia was renowned for producing a long, lustrous and exceptionally white crossbred wool, suitable for many uses but mainly in the fashion coats markets. Critically, it was a kemp free product, easily dyed and having a soft handle with a fibre diameter of 25 to 30 micron.

Much of this was produced from the traditional first cross ewe (Merino ewe/Border Leicester ram). Even the second cross lamb wool product was generally white, kemp free and still retained a degree of softness to the touch.

A premium price above other producer nations was regularly paid by manufacturers for these qualities.

## Price

Whilst Australia does retain a good portion of these better crossbred wool types, market forces have impacted heavily on their values. With many inferior lots available at a much cheaper price, some extravagant blending takes place by buyers and overseas manufacturers which pulls all prices back. No longer does Australia have that quality premium, particularly for wools broader than 30 microns.

All crossbred wool price indicators are sitting at very low historical levels. Prices at the beginning of March sit within the 8 to 24 percentile bands when comparing an average of the last three months values against the last five years average prices. The past 12 months has seen a little price stability starting to appear, but this stability is at very low values, with quite often the cost of harvesting and selling preventing any margin or profit from the wool portion of the sheep meat and lamb enterprise.

Figure 1: Percentage of >23.5 micron wool production by state

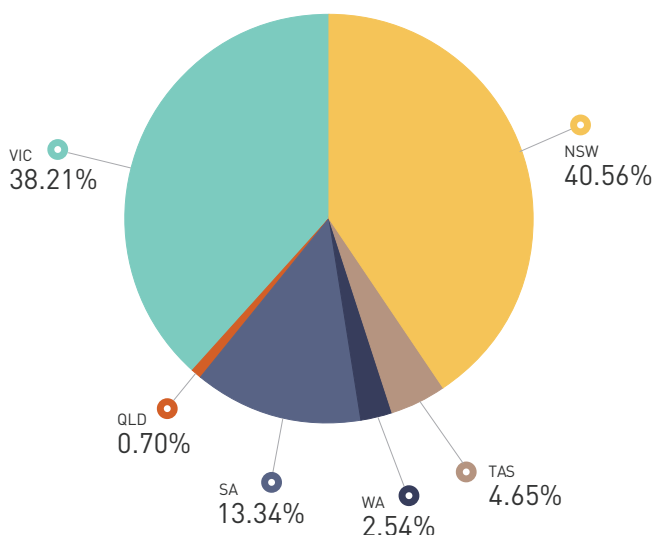


Figure 2: Percentage of >23.5 micron as a percentage of state total

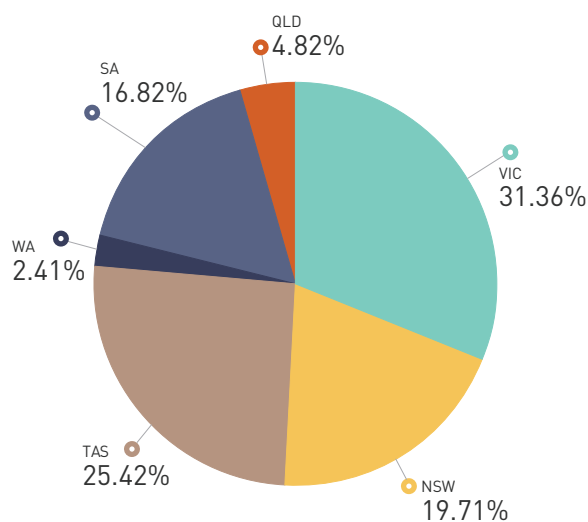
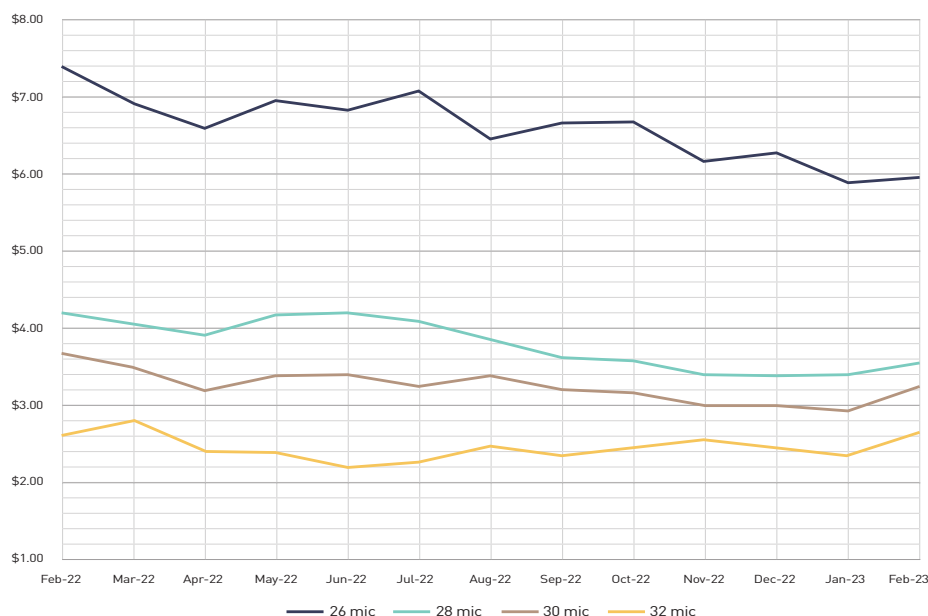


Figure 3: Broader wool prices in the past 12 months



After a period of a few years, growers of these wools had held wool back hoping for a better price to appear, but holding costs and no light at the end of the tunnel has seen a change in sentiment in regard to holding wool, and a much higher percentage is being sold rather than passed in than the previous years.

There is still a very high volume of stocks held globally of these broader wools. This exists all the way down the pipeline from yarn back to greasy held in store and even on farm, where possible, to avoid costs of commercial warehousing. The largest global producer of crossbred wools New Zealand has an annual production well over 100mkg compared to Australia's 65mkg and the growers there have generally been resisting the low prices, but a 15% price rise a few months back has seen a flurry of sales being accepted.

When comparing alternative fibres to wool traditionally used in apparel and clothing markets, it is an interesting yet untested and untried comparison to see 28 micron wool sitting on similar values to polyester and 30 micron wool neck to neck with cotton. What this means is still under analysis, but what we do know is that growers of the broader wools are unhappy with their prices, yet when compared to a kg of cotton, perhaps that is an end use market whereby some replacement of those products with wool can assist recovery, and similarly with polyester fibre.

Within Australia, the crossbred wool type is over 19% of production, but brings in under 5% of the total value of the clip.

Figure 4: Prices of broad wools in comparison with other fibres

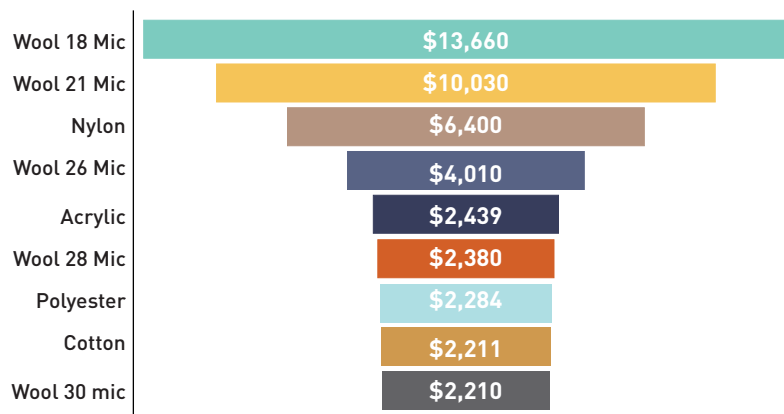
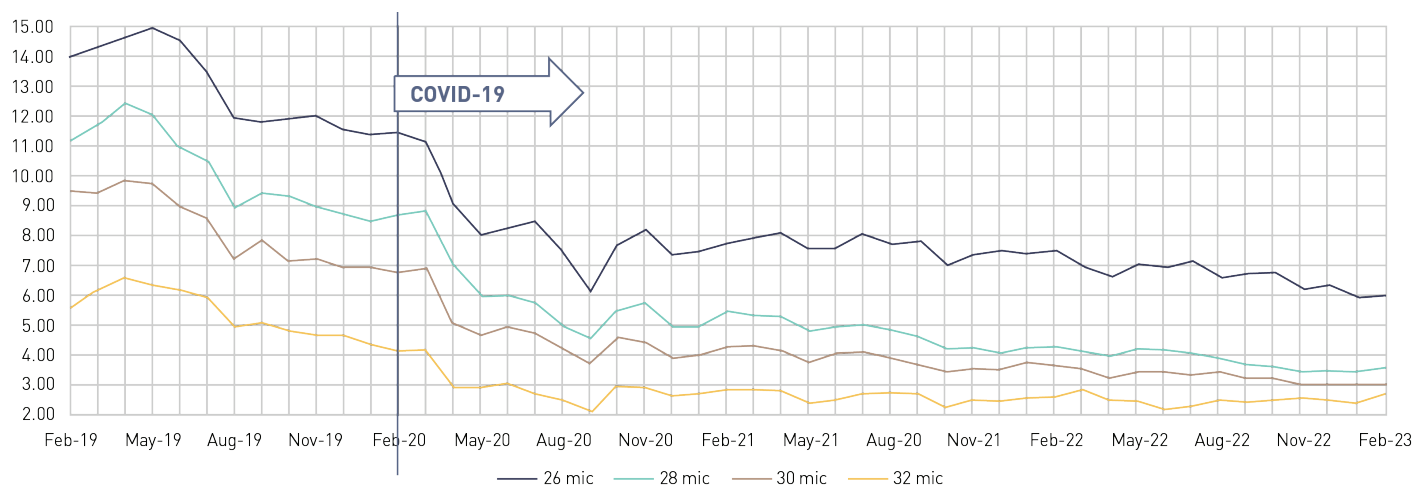


Figure 5: Broad wool pricing during past four years





# AWI R&D AND EXTENSION INVESTMENTS THAT BENEFIT NON-MERINO WOOLGROWERS

**Many of AWI's on-farm R&D and extension investments benefit producers of broad wool just as much as producers of Merino wool.**

**This includes funding of in-shed shearer and wool handler training; R&D into optimising sheep health and welfare; combatting wild dog, fox and feral pig attacks; increasing the reproductive efficiency of ewes; and harnessing opportunities for on-farm automation.**

**In addition, AWI delivers practical training programs through its extension networks in each state to increase producers' adoption of best practice on-farm production and management. AWI also provides timely market intelligence to producers, holds many face-to-face industry events, and runs projects to encourage the next generation into the industry.**

## Wool harvesting

AWI has a multipronged plan to improve wool harvesting, through an enhanced training program, support and mentorship for new shearers, exploring new technologies and better use of technology.

**Training** – AWI funds hands-on practical in-shed training for shearers and wool handlers to attract and retain new entrants into the wool harvesting industry, build the capacity and longevity of existing staff, and increase returns to woolgrowers through improved clip preparation practices. There has been a concerted effort to run extra novice and improver training. During 2021/22, AWI presented 223 toolboxes to new entrant learner shearers who are now working on stands.

**Modular sheep delivery unit** – AWI has undertaken a project to develop a system that delivers sheep directly to the shearer, thereby eliminating the catch and drag from the pen. This minimises the chance of injury to the shearer and the sheep whilst also maximising productivity with significantly reduced handling times. In addition to an 'automatic module', there is a simpler and cheaper 'manual module'. AWI is working with six engineering companies to make the units commercially available.

**Shearing shed safety program** – The *SafeSheds* program, which includes a best practice guide and checklists, is available to producers to assess and improve safety in their shearing sheds, improve working conditions and comply with modern workplace standards.

**AWI shearing shed design** – Working with shed staff, contractors and woolgrowers, AWI designed a shearing shed which addresses worker safety and animal welfare concerns, while also achieving improved shed efficiency and wool quality. The designs of the shed are available from AWI free to all producers.

**Bio-defleecing** – An AWI-funded project is under way to develop a new biological harvesting method by weakening the wool fibres so the fleece can be removed without the need for nets or cutters.

## Sheep health & welfare

AWI's R&D investment is focused on ensuring producers have access to the latest in information and tools to improve the lifetime health and welfare of their sheep.

**Flystrike extension program** – AWI's Flystrike Extension Program supports producers to improve the lifetime welfare of their

sheep, reduce their reliance on mulesing and crutching, optimise chemical use and increase whole farm profitability through the provision of practical information and tools and access to accredited advisor support on flystrike management. The information and workshops are for all producers, whatever their sheep type, climate, operating environment or husbandry practices.

**Worms, lice and fly management** – ParaBoss is a suite of three web-based products (WormBoss, LiceBoss plus FlyBoss) containing detailed management information to help sheep producers manage risks related to worms, lice and flies.

**Analgesics and anaesthetics** – The development of effective and practical anaesthetic and analgesic treatments for lambs has been a critical advance in alleviating the distress lambs experience with husbandry procedures such as tail docking and castration.

**Post-farm biosecurity** – AWI helps ensure the Australian wool industry has effective plans and tools in place post-farmgate to minimise the potential impacts on the selling and trade of wool should an emergency animal disease occur in Australia.



## Reproduction and nutrition

AWI research is focused on the main factors influencing the productivity of sheep reproduction, including producer education and best practice management, ewe nutrition and supplementary feeding, mob dynamics and climate variability on sheep reproductive health.

**Lifetime Ewe Management** – This course provides hands-on on-farm training over a year, for small groups of producers (about 5-7) in the management and nutrition of breeding ewes to maximise reproduction rates and lamb and ewe survival.

**RAMping Up Repro** – This workshop is designed to give producers the skills to improve ram health, performance and longevity in their sheep breeding enterprises.

**Feed On Offer Library** – AWI provides a web-based photo library of feed on offer (FOO) standards containing 650 images to enable producers to estimate the FOO and nutritive value of grazed pastures, by comparing their own pastures to reference photos.

**Supplementary feeding** – An AWI co-funded project is comparing the effects of using trail feeding or self-feeders during lambing on ewe behaviour and lamb survival. The project's results will be used to create supplementary feeding guidelines for sheep producers to optimise lamb marking rates.

**Dryland legume pasture systems** – AWI is working in a collaborative project to develop recently discovered pasture legumes together with innovative management techniques to improve profitability for mixed farms in the low and medium rainfall areas of WA, SA, Victoria and southern NSW.

## Agri-technology

AWI invests in trials and research within several areas of agri-technology. The focus is on automated data collection and analysis systems, wool harvesting innovation, novel applications for technology within the wool industry and digital awareness and adoption.

**Mechatronics for the wool harvesting industry** – AWI is investigating how mechatronics (a combination of mechanics and electronics) can be applied to the wool harvesting industry. Under development is wearable technology that will potentially provide shearers with an early warning system for fatigue-triggered injuries; and a semi-autonomous wool handling system.

**AWI Smart Tags** – Automated data collection and analysis systems, such as AWI Smart Tags, can provide woolgrowers with real time information regarding their flock and property operations, enabling them to make more informed decisions to increase their enterprise's profitability.

**OFFM and follicle density** – An AWI-funded project to develop a simple, low-cost device for on-farm fibre measurement (OFFM) is in the final stages of R&D, and the technology could also be used to measure follicle density.

## Vertebrate pests

AWI works with producers and other stakeholders to help achieve sustained control of wild dogs and other vertebrate pests.

**Wild dogs, foxes and pigs** – AWI invests in a comprehensive suite of projects to help prevent attacks and sheep loss due to all predators. Notably, AWI funds wild dog coordinators to help landholders and communities work together to combat wild dog attacks; they also help coordinate on-ground wild dog control activities. Coordinators have broadened their approach to simultaneously deal with foxes and feral pigs as required.

**Rabbits** – AWI invests in rabbit biocontrol, most recently in trying to get an RHDV2 biocontrol agent registered and the development of a vaccine for RHDV2 (so commercial and pet rabbits are protected when the biocontrol agent is released).

## Genetics

AWI aims to assist producers optimise their rate of genetic gain in their chosen breeding objective. While LAMBPLAN's terminal and maternal benchmarking service is most relevant to producers with a prime lamb breed focus, AWI continues to focus on a range of genetic projects that are relevant to all sheep producers.

**Non-invasive cervical artificial insemination** – With increasing concern about invasive laparoscopic AI and use of an animal-based cycling product PMSG, AWI funded a five-year \$1 million project with the University of Sydney seeking to solve the low conception rates using frozen/thawed semen by the non-invasive cervical AI method. The project isolated down to four proteins that are impacted on freezing and thawing that reduces the 70% conceptions gained when using fresh semen by cervical AI compared to the 20% conceptions using frozen/thawed semen. Further work is continuing in the UK and Europe and more work in Australia is planned when funds are available.

**Sexed semen** – Two recent projects have improved the semen diluents that better allow the semen to be 'drafted' into male and female sperm. This service is now available through Total Livestock Genetics. To date this has been adopted more by prime lamb breeders as they already have sufficient ewes and are looking to breed and sell more males.

**Feed efficiency** – AWI and Murdoch University WA are investigating measures of animals' feed intake, whole body energy reserves and productivity. While involving Merino sheep, the

principles and methodologies will be able to be adopted for other sheep breeds. All data will be collected by Autumn 2023 and then analysed. The true implications will then be known.

## Extension, education and leadership

AWI aims to help improve the engagement and motivation of producers, especially young people, in the industry, thereby developing and retaining skills the industry needs to be innovative in response to new challenges.

**AWI extension networks** – Through the AWI-supported networks, which are present in each state, AWI extends its R&D and training to producers across Australia, delivering localised industry information and events, and ultimately achieving measurable adoption and practice change. The networks are Sheep Connect NSW, Sheep Connect SA, Sheep Connect Tasmania, BESTWOOL/BESTLAMB (Vic), The Sheep's Back (WA) and Leading Sheep (Qld).

**Making More From Sheep** – This best practice package of information and tools for Australian sheep producers contains the very best information on sheep and wool production.

**Young producer initiatives** – AWI supports several initiatives including the Breeding Leadership course, Nuffield Farming Scholarships, AgriFutures Horizon scholarships, Science and Innovation Awards for Young People in Agriculture, and the Hay Inc rural traineeship program amongst others.

## Market intelligence and communication

**Market intelligence** – AWI disseminates a range of market intelligence information via various channels including: daily wool market reports available via SMS, weekly wool market reports and prices via email, monthly market intelligence reports, market intelligence on wool.com, and Australian Wool Production Forecasting Committee reports.

**Communication** – Producers can keep up to date via regular communications from AWI: *Beyond the Bale* quarterly magazine, The Yarn weekly podcast, Woolgrower monthly e-newsletter, wool.com website, social media (Facebook, Twitter, Instagram, YouTube) and in person at the many sheep and wool events that AWI attends.

**Consultation** – AWI has two forums through which it engages with woolgrower representative bodies. The AWI Woolgrower Industry Consultation Panel (WICP) comprises a core group of members from nine national woolgrower organisations, including a broad wool representative. The AWI Woolgrower Consultation Group (WCG) is a broader group comprising 28 representatives of state and regional production-based woolgrower groups, as well as the members of the WICP.

# 'WEAR WOOL, NOT FOSSIL FUEL'

## ECO CAMPAIGN'S EXCELLENT RESULTS



AWI's marketing arm The Woolmark Company in September launched a powerful marketing campaign highlighting to consumers that synthetic fibres are made from oil, whereas wool is a 100% natural, renewable and biodegradable fibre. The global campaign urged consumers to consider the fibre composition of a clothing product – and choose wool – when they are thinking of making a purchase.

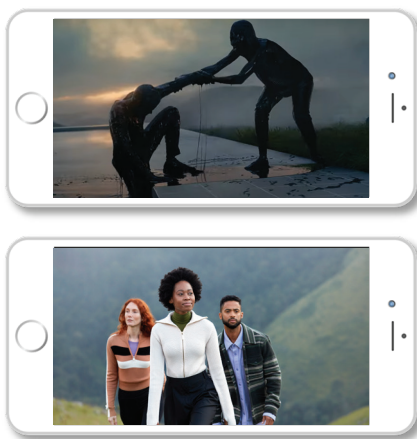
### HIGHLIGHT RESULTS

**92 million**  
video views (156% of goal)

**643 million**  
impressions (181% of goal)

**542,000 clicks**  
to the Woolmark website

**"Excellent"**  
score for ad effectiveness



The campaign centres around a **60-second hero film** that shows people smothered and dripping in oil (representing clothing made from synthetic fibres) realising "it's time to change". They strip off their 'oil clothes' revealing them each now dressed in beautiful pure wool garments.

The Woolmark Company's environmentally focused global campaign 'Wear Wool, Not Fossil Fuel' had an amazing reception with strong and positive results.

The campaign video has been watched an incredible 92 million times. The digital campaign received 643 million impressions (which is the number of times the campaign advert was seen online or on outdoor advertising such as on billboards, bus shelters

and 3D Digital screens) and there were 542,000 online click-throughs to the campaign page on the Woolmark.com website.

The aim of the campaign was to educate the public about the harmful impact of synthetic fibres on the environment, and that choosing a natural fibre such as wool can help reduce the fashion industry's environmental footprint on the planet. Research shows that the campaign has been successful with surveyed consumers saying that it was very impactful:

- 79% said that the advert made them think twice about the environmental impact of their clothes.
- 78% said that, because of the advert, they would consider materials/fabrics when making a purchase decision regarding clothes.
- 80% said that, because of the advert, they believe wool is gentle on the environment.

Featuring a series of powerful visual messages that highlight the link between fabrics made from synthetic fibres and the crude oil used in its manufacture, the campaign centred around a 60-second hero film.

The impactful film shows people struggling to escape an oil-filled swimming pool, which is a dramatic visual based on the insight that every 25 minutes an Olympic pool's worth of crude oil is used to produce synthetic clothing (which amounts to almost 350 million barrels a year).

The video then sees the people wearing wool clothes, wandering with freedom through forests, streams and meadows – a natural paradise – which emphasises the natural attributes of the wool they are now wearing.

The campaign, which was being promoted via digital and social media, was also accompanied by visually striking 3D digital screen advertising in iconic sites in London's Piccadilly Circus and New York's Times Square, along with other global outdoor advertising in the UK, US, France, Australia, Italy and Germany, plus a partnership with popular computer file transfer company WeTransfer.

The campaign will roll out in Japan in early 2023.

These initiatives were Phase 1 of a larger multi-phase eco-marketing campaign from The Woolmark Company.

**More information:** [www.woolmark.com/wear-wool](http://www.woolmark.com/wear-wool)

### Why wool has less impact than synthetics

- 1. Renewable** – Every year, sheep produce a new fleece, making wool a completely renewable fibre source. In contrast, synthetic fibres are derived from non-renewable petrochemicals and fossil fuels, which when extracted de-sequester carbon stored millions of years ago.
- 2. Kept in use longer** – How often clothes are worn is the most influential factor in determining environmental impacts from clothing. Wool garments are on average kept in use for longer periods of time than garments made from other fibre types.
- 3. Less washing** – Research shows that consumers wash wool clothing less frequently than other fibre types, saving water, energy and detergent associated with laundering.
- 4. Reusable and recyclable** – Wool's attributes are so highly valued that, even after a garment has finished its long service life with one person, the fibre is still suitable to be kept in use by another. Wool is the most reused and recycled fibre on the planet of the major apparel fibres.
- 5. Biodegradable** – Wool is made of a 100% natural biodegradable protein. In contrast, synthetic fibres do not biodegrade but instead accumulate in landfill and release microplastics in our oceans or on our land.