

Beyond the bale

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PROFIT FROM WOOL INNOVATION

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OPTIMISING YOUR FLOCK'S REPRODUCTIVE PERFORMANCE



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REASONS TO STAY
IN WOOL SHEEP



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SCHOOL MERINO
WETHER CHALLENGES



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TRAINING RETAIL
STAFF ABOUT WOOL

Beyond the bale

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FRONT COVER

This edition contains a series of articles on the subject of **optimising your flock's reproductive performance**. See pages 10-19 for details.

PHOTO: Grace Corrigan (@fairviewphotos) of Burrumbuttock, NSW.



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



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AWI WORKING FOR WOOLGROWERS



John Roberts
Chief Executive Officer
Australian Wool Innovation

AWI CEO John Roberts provides readers with an overview of how AWI is undertaking R&D and marketing to address some of the key issues faced by Australian woolgrowers.

Woolgrowers voted for a 1.5% levy at WoolPoll

At the 2024 AWI Annual General Meeting (AGM) on 15 November, it was announced that Australian woolgrowers voted at WoolPoll to maintain a levy of 1.5% on their wool sales to fund R&D and marketing of Australian wool.

Woolgrowers had been given four options to choose from: 0%, 1%, 1.5% and 2%. Before preferences were allocated, 37.85% of votes favoured a rate of 2.0%. The next highest option was a 1.5% rate, with 37.35% support. After preferences were distributed, 56% of votes favoured the 1.5% levy rate.

Importantly, the WoolPoll result shows that woolgrowers clearly want to maintain a levy and for AWI to continue to work hard on their behalf to provide valuable and cost-effective R&D and marketing programs.

However, as foreshadowed in the WoolPoll Voter Information Memorandum, the vote for a 1.5% levy means that AWI will have to cease investment in several projects and reduce investment in many others.

It is important to acknowledge and thank the WoolPoll Panel, in particular its Chairman Rich Keniry, for their efforts to promote the vote and get so many woolgrowers to have their say.

At the AWI AGM, I gave a presentation of the activities of the company during 2023/24. AWI fully achieved 75% of its annual targets with a further 20% of the year's targets partially achieved. These results were accomplished despite dwindling reserves and falling revenue that constrained the company to reduce its expenditure by 20% compared to the previous year.

AWI is now developing its Strategic Plan for the three-year period starting next financial year, building on the R&D and marketing results we have already achieved. This new plan will be produced with extensive consultation with woolgrowers and will be shaped by the result of WoolPoll.

You can view a recording of the 2024 AGM and access our 2023/24 Annual Report on the AWI website at wool.com/agm.

Sustainability initiatives build value for woolgrowers

In September, Woolmark launched a powerful second chapter of its successful eco-marketing campaign. Building on the momentum of 'Wear Wool, Not Fossil Fuel', which raised awareness of fossil fuel as the source of synthetic fibres, 'Wear Wool, Not Waste' highlights that synthetic apparel does not readily decompose and remains polluting the environment for centuries – see pages 36-38.

Importantly, the campaign urges consumers to consider the fibre composition of a clothing product – and choose wool – when they are thinking of making a purchase.

The eco-marketing campaign aligns with AWI's broader mission to position wool as a key solution to the fashion industry's sustainability challenges. This vision is encapsulated in the Woolmark+ Roadmap, the program designed to help woolgrowers and supply chain partners accelerate the wool industry's transition towards a 'nature positive' future. Engaging in the Woolmark+ programs will help woolgrowers to increase their access to market opportunities, enhance agricultural productivity and provide new income streams – thereby safeguarding wool-growing now and into the future. See wool.com/sustainability.

It's also critical that AWI and its natural fibre partners continue to advocate European Union (EU) policymakers to amend its Product Environmental Footprint (PEF) proposals before they become law. PEF will not only affect the environmental claims that brands and retailers put on their apparel products, potentially leading to a negative score for wool products based on a flawed methodology, but it may also influence brands' fibre procurement decisions if it's embedded in 'ecodesign' requirements being developed for all products.

Looking to the future with wool

It's important for woolgrowers to keep in mind the two key messages from Agrista's recent analysis of livestock enterprise profitability. Firstly, specialist wool enterprises delivered similar or superior profits compared to other livestock enterprise types over the recent five-years 2018-19 to 2022-23. Secondly, changing to a different enterprise is unlikely to deliver higher profitability for producers. Rather, improving performance within an existing enterprise is more likely to increase profits than moving between enterprises.

Although it is a challenging time for Australian woolgrowers at the moment, there are opportunities to increase productivity and profit at the farm level. For example, this edition of *Beyond the Bale* looks at several AWI R&D and extension projects to help woolgrowers optimise their flock's reproductive performance.

In the off-farm area, it's clear that global economic conditions are not delivering the wool prices right now that woolgrowers deserve for their hard work. However, I believe that the fundamental benefits of wool and long-term consumer trends play in wool's favour, and woolgrowers will reap the rewards when global consumers start spending money again.

Rest assured that AWI, your R&D and marketing company, will continue to work relentlessly for you to ensure the sustainability of our industry and profitability for your enterprises.

I wish you a happy Christmas and New Year and a safe and prosperous 2025.

NEW REPORT PROVIDES REASONS TO STAY IN WOOL

According to a recent analysis of livestock enterprise profitability, specialist wool enterprises have delivered similar or superior profits compared to other livestock enterprise types over a five-year period, and changing enterprises is unlikely to deliver higher profitability for producers.

KEY POINTS IN THE REPORT

- Over the five-years 2018-19 to 2022-23, wool sheep enterprises provided similar or better profits than alternative livestock enterprises.
- Switching to a different enterprise type is unlikely to deliver greater profits for producers. Improving performance within an existing enterprise is more likely to increase profits than moving between enterprises.
- Measuring the financial and production performance of an enterprise is an important way to identify ways to achieve the greatest rewards from the lowest cost; in particular, it is vital to examine the feed supply curve and align it to livestock energy demands over the year.
- Potential opportunities to deliver higher production at low marginal cost include simplifying the operations of the enterprise, improving infrastructure to deliver higher levels of labour efficiency, and investing in genetics.

If you are a woolgrower experiencing low margins in the current economic climate, changing your enterprise based on a *perception* that alternative enterprises would deliver higher profitability might sound tempting. But think again. A report released in August shows that wool enterprises have actually delivered solid operating profits when compared to other breeding livestock enterprises over the last five years.

Furthermore, the report demonstrates that producers are more likely to derive greater profits by improving performance within their existing enterprise rather than changing enterprise.

Released at the end of August, the report, titled *Why stay in wool sheep?*, was commissioned by AWI and produced by John Francis, Director of the highly respected agricultural consultancy company Agrista.

Enterprise level financial data from the Agrista benchmarking database for the five years 2018-

19 to 2022-23 was used to assess variability in economic performance of four livestock breeding enterprise types: beef breeding herds, dual purpose sheep flocks, prime lamb flocks and wool flocks. The data was collected from mixed enterprise farm managers primarily located in eastern Australian states. More detail about the data used in the analysis is available in the report.

This *Beyond the Bale* article summarises some of the key points from the report.

Relative financial performance of wool enterprises

Variations in prices and seasonal conditions were significant during the examined five-year period, which benefited or hindered different enterprise types in specific years. All enterprise types experienced big swings year on year.

However, the annual variations in enterprise type performance disappeared over a longer timeframe (i.e. a five-year period). Figure 1 below shows the five-year average net profit of the four enterprise types, plus the top 20% performing enterprises for each enterprise type.

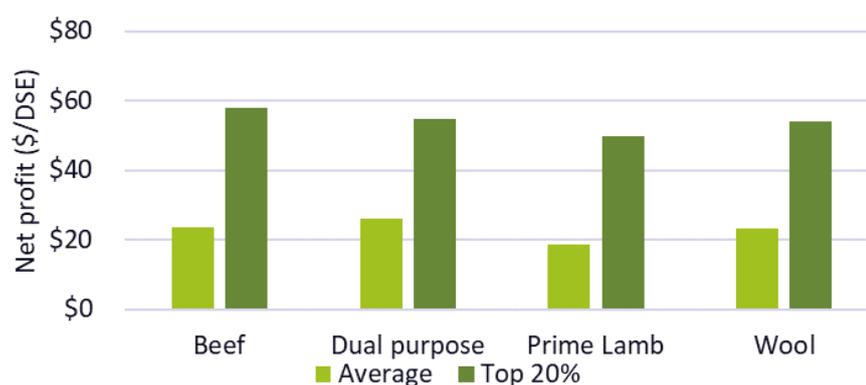
The chart shows that specialist wool enterprises have delivered similar or superior profits when compared with alternative enterprise types.

The greatest difference between enterprise types is \$7.30 per DSE, which is the difference between the dual purpose sheep and prime lamb enterprises. However, this between-enterprise difference is small when compared with the difference of approximately \$30 per DSE seen in all enterprise types between the average and the top 20% performing enterprises.

The variability *within* enterprise exceeds the variability *between* enterprise by an approximate magnitude of more than four times in most enterprises.

This suggests that, where the producer's aim is to improve financial performance over the medium or long term, the primary focus should be on enhancing the results of their existing enterprise rather than moving between enterprises. In other words, it is likely there is more to be gained by getting better at their current enterprise than changing enterprise.

Figure 1: Five-year average profits for four different enterprise types



"Improving what you know delivers more value than moving to what you don't."

John Francis, Director of Agrista

What do the best woolgrowers do differently?

Using long-term comparative analysis, one of the key features of highly profitable wool enterprise managers is that they typically deliver far more production and superior profits per hectare but only marginally greater production and profit per DSE.

Examination of these high profit wool enterprises in south-eastern Australia shows that the primary difference between these managers and the remainder is higher levels of feed utilisation. In these localities, approximately 60 per cent of the pasture supply occurs during 25 to 50 per cent of the year so implementing a livestock system that has high energy demands over this period is important.

The key output of higher relative feed utilisation is higher relative stocking rate. This delivers higher profitability by increasing the margin on each kilogram of wool and sheep meat produced. It does this by delivering cost efficiency by spreading the overhead cost structure over more wool and sheep meat production.

High levels of feed utilisation are unattainable with a system that does not match feed supply with feed demand. The simplest of systems changes typically comes from aligning lactation with a period of high supply and quality of pasture, and reducing ewe energy demands to maintenance during the period of the year when pasture energy and supply are low.

Supplementary feed costs are also a feature of these high profit livestock enterprises. The supplementary feed serves the purpose not only of supporting the appropriate number of livestock moving into the period of high energy supply, but it also delivers the difference between the pasture energy deficit and the energy demands of the flock as pasture energy declines. Feed for the energy deficit is necessary irrespective of the level of feed utilisation of the manager.

The cost structure per DSE of high profit livestock producers is typically lower than the remainder. This difference occurs due to superior labour efficiency and the spreading of the overhead cost structure over more production.

Genetics plays a large role in improving productivity by delivering greater wool and meat value per unit of energy consumed. The value of the contribution of genetics is not easily discernible from wool enterprise data, however general observations of the high profit cohort suggest that these producers invest heavily in this area.

“There are large opportunities to improve wool flock profits even when wool prices are low, but they require a change to conventional thinking. Wool enterprise managers can start by measuring financial and production performance to identify the greatest rewards from the lowest cost.”

John Francis, Director of Agrista

Streamlined operations to reduce complexity

Another feature of highly profitable livestock managers is their ability to streamline operations to deliver simplicity. Examples include single lambing dates within the year, single shearing dates within year, the joining of ewes as hoggets and the inclusion of multiple age groups of wethers to reduce the number of weaners that must be managed.

Practical tip: Assess the operational calendar and establish whether there are multiple activities occurring with limited or no marginal benefit. Develop an operational calendar and see whether there are handling operations that could be combined to reduce unnecessary work.

Reduced workload and physical demands

Some infrastructure and sheep handling investments have been shown to significantly improve labour efficiency while potentially delivering high returns on investment. Examples include laneways, sheep handlers and lifters, covered work areas, and sprinklers for dust suppression. Many of these investments also serve the purpose of attracting or retaining staff and making tasks less physically demanding or more pleasant.

Practical tip: Conduct an audit of infrastructure and handling equipment and apply a rating from 1 (near new) to 5 (needs replacing). Consider equipment for which small investments or repairs could make large differences to labour efficiency or workplace enjoyment.

“Simplifying operations and examining infrastructure for opportunities to delivering higher levels of labour efficiency will go a long way to improving enterprise profitability and satisfaction.”

John Francis, Director of Agrista

Changing enterprises has its costs

In addition to considering the relative profitability of enterprise types, it is also important to note that there are costs incurred by actually changing enterprise type. These costs are often not considered with adequate attention because they are difficult to quantify. Of note:

- 1. Skill development takes time:** Switching enterprises requires investment in understanding the profit drivers of a different enterprise and the development of new skills.
- 2. Performance lag leads to lower profits:** Peak efficiency in a new enterprise is unlikely to occur instantly. There is usually a lag.
- 3. Infrastructure and genetic investment:** The requirement for capital can be significant. Investment analysis shouldn't just value the marginal benefits but also the up-front capital costs. Genetics, infrastructure and plant are usually the big ticket items.

Given the extreme cost of changing enterprise, woolgrowers should quantify the level of production and financial performance in their existing enterprise. This approach allows for the objective assessment of enterprise performance and identifies low cost opportunities to improve productivity and profitability within the enterprise before considering moves between enterprise.

Wool enterprise strengths

Diversity of income – Wool enterprises have multiple income streams including wool, sheep meat and, in some cases, lamb. This diversity in income enables woolgrowers to adapt their enterprise based on market signals, resource suitability or management preference.

Income generation during drought – Wool sheep have low maintenance energy requirements and produce a fleece of reasonable value even in a drought, meaning that the reduction in income due to drought is lower when compared to livestock enterprises dependent on meat production.

Maternal flexibility – The Merino ewe has the flexibility to be joined to a Merino to produce progeny with high capability of growing wool, or to a maternal sire, or a terminal sire, or it can be managed as a dry sheep with lower energy requirements and higher wool production relative to a lactating ewe.

The value of wethers and dry ewes – Wethers are a feed efficient animal because there is no reproductive demand for energy. These animals are well-suited to land classes with low energy feed and to environments with little seasonal rainfall pattern.

More information:

- Download the 12-page *Why stay in wool sheep?* report at www.wool.com/stayinwool
- View a recording of John Francis talking through the report in a webinar held in October, available at www.youtube.com/AWIWoolProduction



HALL OF FAME AWARDS FOR SHEARER TRAINERS

Two of AWI's shearer trainers were inducted into the prestigious Australian Shearers' Hall of Fame at Shear Outback in Hay, NSW, in October. This demonstrates the quality of the shearer trainers that AWI uses to train new and current shearers in the wool industry.

Two of the five shearing legends that were inducted in the Hall of Fame this year were Brian Sullivan of Deniliquin in NSW and Damien Boyle of Broomhill in WA.

Brian has been a shearer trainer for the past 20 years, the past 10 years with AWI, while Damien has been a trainer for the past three years with AWI.

The other three shearing legends that were inducted in the Hall of Fame in October were Peter Black of WA, Peter Orcher of NSW and Alan Williams of NSW.

Other current AWI trainers already inducted into the Hall of Fame are Ian Elkins of NSW and Kevin Gellatly of WA.

Damien Boyle

Choosing a career in shearing was a natural choice for Damien. His father is farmer, shearer and WA wool industry legend Don Boyle.

Damien learnt how to shear from his father on the family's own flock at Mt Barker before joining, at 15, a local team run by Don.

Having been lucky enough to be taught by one of the best, Damien appreciates the value of training for both the shearer and the woolgrower.

"Formal training for learner shearers is vital to get them into a good style and know a quality job. Once the technique has been mastered, pace will then come," Damien said.

"Importantly, training educates shearers about what the standard is to provide the best outcome for the farmer. The farmer has spent 12 months growing the wool and then passes the baton to the shearer to complete the job. If the job is performed below standard there will be a financial implication to the farmer."

Damien's own career has had many highlights, including a successful competition shearing career.

At age 37, Damien had 22 years of competition under his belt and he has made the finals of 99% of competitions he has entered. He has won multiple national titles and more than 200 open competitions.

Damien says he was honoured to be inducted into the Australian Shearers' Hall of Fame in October.



Damien Boyle training shearers at the WA Government's Muresk Institute at Northam in June 2023.

"I felt extremely proud and it was a great weekend that I got to share with family and friends. Being inducted alongside Brian was even more special," Damien said.

"I love shearing, I've loved shearing in teams, loved being able to travel and work. My competition shearing career allowed me to meet so many passionate people from all ends of the globe. I now enjoy training learners, it's such a privilege to help them and watch them grow and enjoy the industry.

"It's a great career for youngsters to join. They get to meet people and travel around, can learn on the job, don't require a massive amount of gear to start, and the pay is great.

"For any young shearers out there, I say just keep on going, practice every blow on every sheep, master that style, don't be in a rush for the tallies, that will come."

Brian Sullivan

Brian Sullivan's enthusiasm for shearing began when he was a youngster and has continued throughout his career.

"My father was a shearer for many years, shearing up and down the eastern states. I also grew up in a town of 1,000 people that had more than 30 shearers living in it. This is where my enthusiasm for shearing came from," Brian said.

"I used to go out with my father and my mates' brothers every chance we could. I was lucky enough to do an improver school with Fred Jarvis, who was a Wool Corp instructor, from which I benefited a lot."

Now himself a shearer trainer for AWI, Brian is dedicated to supporting the next generation in the industry at shearing schools and by

providing in-shed training support. He is widely known for dropping in and assisting learners on the job.

"Shearer training provides learners with up to date techniques and improves all aspects of their day to day work," Brian said.

"The appearance of a trainer in the shed and improved wool preparation also provides the woolgrower with a very tangible illustration of how their wool levies are being spent to improve shearing and wool handling going forward, for the woolgrower's benefit."

As well as working and training in the sheds, during his career Brian has enjoyed competition shearing at a high level. He has won eight State titles and 60 open shearing titles.

"It is a great honour to be inducted in the Australian Shearers' Hall of Fame and to have my name and picture up alongside arguably some of the best in the business, and to be remembered for putting something back into the industry," Brian said.

"In my opinion the shearing industry is suited to a wider variety of people than most think. I would highly recommend the industry to any young person wanting to travel."



Brian Sullivan training shearers at Paraway Pastoral's 'Steam Plains' near Conargo, NSW, in September 2014.

Novice training courses help attract next gen



A great group of 15 young, enthusiastic shearers at an AWI novice shearing school held in September at Paraway Pastoral's 'Cooimbil Station' at Coleambally in NSW. The AWI trainers were Brian Sullivan (see opposite), Janice Beshmann and Mike Pora who also coached new AWI trainer Nathan McClelland.

AWI funds hands-on, practical in-shed training for shearers and wool handlers across the country to attract and retain new entrants into the wool harvesting industry. AWI-funded novice training courses provide participants with a solid introduction to the wool harvesting industry and create a pathway for them to obtain ongoing employment.

AWI-funded novice shearing courses are suitable for participants ranging from wool handlers looking to learn new skills in shearing and farm workers wanting to gain experience in shearing and crutching, to those new to the shearing industry.

The live-in courses are very practical, shed-based courses taught by leading industry trainers. The courses are fully funded by AWI and are offered at no cost to eligible participants. Once a person has completed a novice course, they may be employable as a 'learner shearer' in a commercial wool harvesting operation.

Craig French, AWI National Manager, Wool Harvesting Training & Careers Development, says the training aims to make participants job-ready for shed work, thereby helping build the wool harvesting workforce.

"It is a very hands-on course that covers topics like shearing gear, set-up and safety, handling sheep, shearing technique, wool handling, the significance of a good work ethic and camaraderie, and the importance of a quality end-product," he said.

"Throughout the course, participants also get taught all aspects of wool handling, wool pressing and clip preparation to prepare them to go straight into the industry as a wool handler if not a 'learner shearer'.

"But the course is not only about shearing and wool handling, it is also about providing youngsters with life skills, such as the benefits of health and nutrition, personal development and importantly a career pathway."

In addition to funding novice training, AWI also funds training for learner and advanced shearers, thereby helping to retain workers in the industry; increase their productivity, skills and professionalism; and increase returns to woolgrowers through improved clip preparation practices.

Three years ago, AWI introduced a project to equip learner shearers with an 'AWI Learner Shearer Toolbox' containing a handpiece and other shearing gear, subject to the shearer passing certain criteria. The AWI Toolbox provides an extra incentive for budding shearers to build up their skills and stay in the industry.

AWI-funded trainers carry out wool harvesting training in New South Wales, Western Australia, Queensland and Tasmania. In Victoria and South Australia, the AWI-funded training is provided by the Shearing Contractors Association of Australia Shearer Woolhandler Training Inc (SCAA SWTI).

AWI thanks all the woolgrowers who provide their facilities and sheep, and all the other organisations and individuals that lend their time and resources to help run this training.

More information: www.wool.com/harvestingtraining

AMBASSADORS PROMOTE WOOL HARVESTING

Following the success of last year's Wool Ambassadors Program, 15 young shearers and wool handlers have been announced as ambassadors in the 2024/25 program. The young ambassadors are tasked with promoting the wool harvesting industry to help attract and retain wool harvesting staff.

The state-based shearers and wool handlers in the Wool Ambassadors Program are positive role models for the wool harvesting industry, thereby helping to attract a quality workforce, raise wool harvesting standards and improve the culture in shearing sheds.

Now in its second year, the program is an extension of the training initiative that has been run for several years in South Australia and Victoria by SCAA Shearer Woolhandler Training Inc (SWTI) with support from AWI.

The new program has seen wool harvesting ambassadors introduced into New South Wales, Western Australia, Queensland and Tasmania as well as in South Australia and Victoria. They are selected annually by expert shearer and wool handler trainers.

AWI National Manager, Wool Harvesting Training & Careers Development, Craig French, says the ambassadors have been selected as role models in the industry.

"They have been chosen due to their leadership qualities, outstanding talent and potential to excel, and their high standard of presentation and conduct in shearing sheds and also out of hours," Craig said.

"They are mostly second- and third-year entrants to the wool industry, are team players, have a great work ethic, and have a willingness to learn and better themselves.

"As ambassadors for the wool industry, they will visit workshops and industry events to highlight the successes and benefits of working in the industry – and will be able to demonstrate a range of career pathways. During the year, they will also compete in a minimum of three Sport Shear competitions in their state."

Each state team of ambassadors are provided with clothing and personal mentoring from AWI or SWTI trainers; the shearer ambassadors are also provided with shearing equipment from Heiniger.

The ambassadors will receive a trip to New Zealand from AWI to receive further training and participate in the famous Golden Shears competition.

AWI thanks all the previous wool harvesting ambassadors for their hard work in promoting the wool harvesting industry.

Victoria



The Victorian ambassadors **Maxi Armistead** (shearer, Colac), **Aleisha Rintoule** (wool handler, Gympowen) and **Jack McArdle** (shearer, Colbinabbin), pictured here with AWI Victoria Industry Relations Officer Holly Byrne, Heiniger's Ben Mulraney, Fox & Lillie's Genevieve Butler, and SWTI's Glenn Haynes. The awards were presented at Clunes in front of the crowd of young people during the Victoria School Merino Wether Challenge (see pages 30-31) at which the ambassadors did the wool harvesting. This year's Victorian program is a joint industry effort between SCAA SWTI, AWI, Heiniger, Prime Super, Fox & Lillie and ioMerino.

South Australia



The South Australian ambassadors **Mitchell Yates** (shearer, Kimba), **Joe May** (shearer, Cummins) and **Cody Pearce** (wool handler, Mount Pleasant) being presented with their awards by SWTI's Josh Sneath and Glenn Haynes. The awards were presented at the Adelaide Show in front of the crowd of young people during the South Australian School Merino Wethers Competition (see pages 30-31) at which the ambassadors did the wool harvesting. This year's South Australian program is a joint industry effort between SCAA SWTI, AWI, Heiniger, Prime Super, Fox & Lillie and ioMerino.

New South Wales/Queensland



The ambassadors of **Ally Johnson** (shearer, Barraba) and **Jack Philipson** (wool handler, Parkes) are pictured above in blue shirts at the back and front, with AWI trainers and the previous year's NSW and Queensland ambassadors. The photo was taken at the New South Wales School Merino Wether Challenge in Dubbo (see pages 30-31) at which the ambassadors did the wool harvesting. A third NSW ambassador, **Randy Bedford** (shearer, Young), was unable to attend this event. This year's program is a joint industry effort between AWI, Heiniger, and NSW WoolTag.

Western Australia



The Western Australia ambassadors **Tristan White** (shearer, Yealering), **Mikayla Reihana** (wool handler, Calingiri) and **Blake McFarlane** (shearer, Mount Barker) being presented with their awards at the Perth Royal Show in September, pictured with AWI WA Industry Relations Officer, Tennille Norrish, and WA Shearing Industry Association Executive Officer and AWI WA Training Coordinator, Valerie Pretzel. This year's WA program is a joint industry effort between AWI, WA WoolTAG, WA Shearing Industry Association, WA Government through the Department of Primary Industries and Regional Development, Heiniger, and Westcoast Rural.

Tasmania



The Tasmanian ambassadors **Ashlee McConnon** (wool handler, Swansea), **Katelin Barker** (shearer, Evandale) and **Tom Jacobson** (shearer, Kellevie) being presented with their awards at the Westbury Show in November, pictured here with SWTI trainers Petrisse Leckie and Steve Rigby and AWI's Tasmania training coordinator Lachlan West. The program this year is made possible by the generous sponsorship of Primary Employers Tasmania, SCAA SWTI, AWI, Heiniger, ioMerino and Next Level Elite Mentoring.

Back-to-back win for Slim in the Nationals

A special congratulations to 2023/24 wool ambassador Alexander (Slim) Schoff from Chinchilla in Queensland who won the Open Wool Handling title at the 2024 National Shearing and Wool Handling Championships held in October at Katanning, WA. This follows on from his win at last year's Championships in Jamestown, SA. The only previous male back-to-back winner was Dave Summers, also a Queensland.



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\$5.55/EWE PROFIT FROM PREGNANCY SCANNING

PHOTO: slovegrove

AWI and Meat & Livestock Australia (MLA) have produced new extension material that clearly demonstrates the value of pregnancy scanning to increase farm profitability. The material also explains what's involved with pregnancy scanning and how to best manage ewes once they have been scanned.

BENEFIT-COST ANALYSIS SUMMARY

- Scanning for multiples increased profit by an average of \$5.55 per ewe scanned, with an average return on investment of 400%.
- Scanning for multiples provided more than twice the average profit of scanning for only pregnancy status (pregnant or empty).
- Capturing the potential profit requires implementing some management changes to utilise the information provided from scanning.

A benefit-cost analysis (BCA) funded by AWI and MLA shows that pregnancy scanning for multiples and implementing optimal management to ewes based on their reproductive status provides sheep and wool producers with a 400% return on investment, with the profit averaging \$5.55 per ewe scanned.

The BCA showed that scanning for multiples is profitable in all Australian regions and flock types studied.

AWI National Extension Manager Emily King says determining a ewe's pregnancy status and the number of lambs she is carrying allows producers to provide optimal nutrition and conditions for the ewe.

"Managing ewes based on whether they are carrying single or multiples, by adjusting feeding or paddock allocation at lambing, can lead to increased marking rates. In addition, identifying and excluding passenger ewes from the breeding flock allows precious feed resources to be prioritised to those ewes that are pregnant," Emily said.

"The greatest improvement in profit from investing in pregnancy scanning comes from scanning for multiples, removing the passenger ewes and managing the needs of single- and multiple-bearing ewes based on the number of lambs they are carrying."

Emily King, AWI Extension Manager

Pregnancy scanning for multiples is vital to understand where the biggest opportunity is to reduce reproductive wastage in a flock. For example, scanning percentage and lamb marking rates may be very different, indicating that lamb survival should be prioritised to increase marking rate.

Pregnancy scanning also enables producers to be more proactive in animal welfare, improving the survival of not only the lambs but also the ewes, particularly multiple-bearing ewes, by reducing difficult births and risks of disease.

The BCA showed that scanning for only pregnancy status (pregnant or empty) returned an average profit of \$2.65 per ewe scanned.

"While this is less than half the profit achieved compared to scanning for multiples, it is still a good start. It's common for producers who scan for only pregnancy status to progress to scanning for multiples in future years as they become comfortable with the process," Emily said.

Increasing adoption of pregnancy scanning

The latest AWI and MLA National Producer Survey reveals that 55% of producers do not scan their ewes. Past research has indicated that the main reason for producers not scanning is because they 'see no benefit'.

"However, now we have the BCA, we have the evidence that pregnancy scanning is a valuable tool for increasing reproductive efficiency and farm profitability," Emily said.

"Our new extension material communicates the strong case for scanning, especially for multiples, including economic, productivity and welfare benefits, and aims to encourage its adoption by many more producers."

The new extension resources comprise a set of five booklets and fact sheets:

1. **Pregnancy scanning: an ultra-sound investment** – This booklet is the primary, 'go to' extension resource. It is a comprehensive publication that not only explains pregnancy scanning and how it works, but also includes the three resources listed 2–4 below.
2. **The value of pregnancy scanning fact sheet** – This two-page fact sheet

summarises the results of the BCA, highlighting the economic benefit of pregnancy scanning and which management interventions provide the greatest return on investment.

3. **Ewe scanning and management checklist** – A handy two-page checklist, this is designed to go on the fridge and be a reminder of the key dates, actions and activities for getting the most out of pregnancy scanning.
4. **AWI and MLA resource guide for sheep reproduction** – This is a comprehensive listing of AWI and MLA sheep reproduction resources with information on how to access them. The resources are grouped into four categories: Reproduction; Sheep health; Feedbase & nutrition; and Breeding & selection.
5. **The value of pregnancy scanning: A benefit-cost analysis** – If you're interested in more detail, this five-page extract from the full BCA report includes the assumptions and growing season length for each scenario modelled in the BCA and includes a link to the full BCA report.

More information: Download the new extension material at www.wool.com/pregscanning



AWI and MLA co-funded research provides strong evidence that pregnancy scanning has a high return on expenditure. PHOTO: Cousins Merino Services

UNLOCKING THE POTENTIAL OF eID

A new AWI and MLA co-funded project will raise awareness amongst sheep and wool producers of the opportunities for using electronic identification (eID) to increase their productivity, with the aim to increase adoption of precision sheep management techniques.



A stick reader can quickly and accurately identify the eIDs of your livestock.
PHOTO: Shearwell Data



Ruby Woodlock of Forbes tagging two-week old lambs with eID in April last year at Lachlan Merinos in NSW.

In an initiative aimed at improving livestock traceability and biosecurity, Australia's federal and state agriculture ministers in 2022 resolved that the sheep industry will transition towards nationwide mandatory eID by 1 January 2025. An eID device, which is generally in the form of an ear tag, contains a microchip that relates to each individual sheep.

Although mandatory eID is being introduced so that animals can be traced quickly and more easily during a disease outbreak, eID can also provide on-farm productivity benefits for sheep and wool producers. There are producers across the country already using eID as an individual animal management tool.

"The increasing availability of eID on all Australian sheep farms presents a major opportunity for the sheep and wool industries to exploit the wider range of applications that eID allows beyond the mandatory requirement to upgrade traceability systems," said AWI General Manager, Research, Bridget Peachey.

"Identifying the level of production – such as regarding fertility, weight, and wool traits – and the return that each individual animal contributes to their business can enable woolgrowers to make more informed management decisions when it comes to, for instance, culling and breeding, thereby increasing profitability."

Productivity benefits from eID

A new five-year project funded by AWI and Meat & Livestock Australia aims to unlock the broad potential of eID and precision sheep management for sheep and wool producers to improve their on-farm productivity and profitability. The project is being carried out by the University of Adelaide with key collaborators Murdoch University, neXtgen Agri, WA Department of Primary Industries and Regional Development, and Farming Systems Analysis Service.

"While the use of eID will soon be mandatory, using eID for individual animal management is optional. The decision to purchase, for instance, a tag reader and equipment for drafting and weighing is up to each producer based on preference and capability," Bridget said.

"To transition away from whole flock management towards managing groups and individuals within the flock, producers need to assess and see the value of precision sheep management to justify an investment in infrastructure and skills.

"This new project aims to help producers see the value in eID and how it can enable them to make better informed decisions on individual animals in their flock.

"Utilising existing and novel sheep and wool industry extension channels, the project will firstly raise awareness of the opportunities for producers and then support adoption."

The key activities in the project will be:

1. **Raise awareness of the opportunities** in eID and precision sheep management to improve weaning rates and weaner growth rates. Extension materials will be developed and delivered via existing producer networks.
2. **Develop at least six business cases** for investing in the extra infrastructure needed to capture the management benefits of eID beyond that necessary to meet the statutory requirements.
3. **Develop two 'delivery-ready' learning modules** in the first 12 months tailored to engage producers with varying technical capability and infrastructure.
4. **Establish more than 30 demonstration sites** to engage and support farmers to effectively use eID to monitor an intervention of their choice. The ability to 'observe' technologies and precision sheep management systems successfully operating on commercial farms is considered a critical element in producers deciding to adopt precision sheep management. To be representative of industry variation, sites will be recruited to provide coverage across New South Wales, Victoria, South Australia and Western Australia; various enterprise types; and differing levels of infrastructure and data collection intensity.
5. **Establish at least 24 participatory R&D sites** combined with further analysis of existing data to quantify differences in reproductive rate, lamb survival, weaner growth rate and wool production responses for different groups of animals within flocks. These sites will provide a more evidence-based approach for the optimum segregation and management of individual groups of animals within flocks.

Turn over to read an article on utilising eID data for profit



UTILISING eID DATA TO INCREASE PROFIT

Electronic identification (eID) tags are becoming mandatory, so why not make the most of the technology to help you achieve the goals of your sheep enterprise? This article produced by AWI Extension WA provides information to help you utilise data collected via eID to increase productivity and profit.

What are some of the benefits of eID?

- Increased efficiency of recording and managing data
- Increased accuracy of data compared with visually reading tags
- Reduced incidence of human error in data recording
- Ability to measure the performance of individual animals to help you identify superior animals to retain and poor performing animals to cull (increased selection pressure)
- Ability to make more informed management decisions
- Ability to improve the allocation and utilisation of resources, e.g. pasture, supplementary feed and labour
- Enhanced traceability and transparency throughout the supply chain.

What do I need to collect data using eID?

Data collection using eID requires a device to read the eID tag and a device to input the data. There are some handheld devices which can achieve both of these functions. However, if your handheld reader doesn't let you enter data directly into the device or if you are using a panel reader, then you will also need a device, such as an indicator or laptop, to capture the data.

You will also need software to manage the data, such as Excel. Alternatively, you can utilise a service provider for data management.



An eID auto drafter scans the sheep eID and automatically drafts out the sheep according to the data on the individual animal. PHOTO: Shearwell Data

Some additional equipment that you may require, depending on your objectives, are a barcode printer, barcode scanner and scales for weighing fleeces.

Agriculture Victoria and AWI Extension SA have some useful information about eID equipment and software that can help you identify what may suit your needs and budget (links to the resources are at the end of this article).

We also recommend that you visit suppliers or a neighbour, or ask the supplier to take you to a client of theirs that is already using the gear, to test out different equipment and see what works for you. You don't need to buy expensive equipment at the outset; service providers can be utilised while you find your feet and work out if you'd like to invest in your own equipment. Perhaps you have neighbours or friends who may be interested in co-purchasing equipment that can be shared to reduce costs?

What data should I record?

There is no point collecting data if you don't have a use for it. Therefore, consider:

- The goals of your enterprise and where you want to be in 5-10 years
- Your breeding objective and which traits are profit drivers
- What data can help you to improve your management and save time and labour
- Which data is easy for you to record that can help reach your objectives and choose profitable sheep.

Using eID doesn't need to create extra work. Be opportunistic and base your recording around your management. Collect the data you need when your sheep are already in the yards, such as during pregnancy scanning, lamb marking or shearing.

If you are new to eID, you may like to start recording data on a small scale, such as recording a few traits on your maidens or latest drop of lambs to familiarise yourself with the equipment and the processes involved with data collection.

Valuable data that can be recorded include:

- Pregnancy scanning results
- Lamb birth type
- Dam age
- Wet & dry udder assessment of ewes at marking
- Fleece weight and micron
- Weight and condition score.

Some pregnancy scanning contractors can record pregnancy scanning data against the ewe's eID for you, so check with your scanner when booking.

Once you've determined what data is of value to your enterprise, make sure to include when and what data needs to be collected in your annual management plan.

Examples of utilising data collected via eID to increase productivity and profit

Use fleece weight and micron data to make informed selection decisions

Fleece weights of individual sheep, along with their wool test results (such as micron), can be used with other production data to rank animals and identify both superior and poor performers. You can also use wool data to monitor progress towards your target fleece weight and wool quality, and to assist with ram purchasing decisions to reach these goals.

How does fleece weighing work? The ideal setup for fleece weighing includes a handheld reader, barcode printer, barcode scanner and fleece scales connected to an indicator. The handheld reader is connected to the barcode printer via Bluetooth. The sheep's eID tag is scanned and a barcode is printed. This barcode then stays with the sheep whilst it is shorn. The fleece and barcode are then brought to the fleece scales, the barcode is scanned into the indicator and the fleece weight is recorded against the eID.

A barcode printer is also handy for wool testing so that a barcode can be placed in the bag with the wool sample, which is then used by the wool testing facility to record the wool test results against the sheep's eID.

Increase selection pressure by identifying superior ewes and culling passengers

Identifying ewes with superior performance to retain, and those with poor performance to cull, will increase reproductive efficiency and selection pressure within a flock. Pregnancy scanning, lamb marking and weaning are key times to make use of eID and record data for individual ewes that can be used to identify the performers and passengers.

Culling ewes that are scanned empty or fail to rear lambs (identified by wet & drying udder assessment at marking) in two consecutive years can be used as a strategy to increase the reproductive performance of your flock, largely by reducing the number of ewes scanned empty.

Similarly, you can identify ewes that repeatedly rear lambs to weaning and retain these superior ewes in your flock. If you match lambs to their dams, you could take this to the next level by determining the number of lambs and kilograms of lamb weaned per ewe. This data can then be used to rank ewes to assist with selection decisions.

Use lamb birth type and dam age data to class single- and twin-born lambs from maiden and adult ewes separately

Twin-born lambs may have phenotypic disadvantages compared to single-born lambs. Data from the Merino Lifetime Productivity site at Pingelly showed that a higher proportion of twins are culled compared with singles when they are classed together, which may compromise genetic gain for several traits. Lambs born to maiden ewes may also be disadvantaged compared to those born to adult ewes.

Provided you have pregnancy scanned for multiples and have lambbed and marked singles and twins (and triplets) separately, you can simply record lamb birth type against the lamb's eID on the marking cradle. If you have lambbed your maidens separately from your adult ewes, or lambbed in age groups, you can also record dam age on the marking cradle. This data can then be used at classing to ensure you are not making biased selection decisions.

Assess the responsiveness of your flock to condition score at joining using ewe CS and pregnancy scan data

Improving ewe nutrition for joining increases the number of lambs conceived on average, however the response is variable. The LifetimeWool project showed that some ewe flocks are responsive to improving condition score at joining (+30 lambs per condition score) whilst others are less responsive (+10 lambs per condition score). This was shown to affect the profitability of ewe management options approaching joining by \$1 to \$3 per ewe, depending on the value of extra lambs.

You can collect data for condition scores at joining and pregnancy scanning to determine the responsiveness of your flock – a link to the instructions is at the end of the article. Knowing your flock's response is important when deciding about feeding ewes leading up to joining.

Manage animals based on weight or condition score and weight gain

Monitoring the weight and/or condition score (CS) of sheep within your flock is essential for making informed management decisions that maximise productivity. Condition score is recommended for managing adult stock and liveweight for lambs and weaners. Benefits of monitoring CS or weight include:

- Optimising paddock allocation and supplementary feeding to achieve condition score targets for ewes at joining and lambing, and to optimise the recovery of ewes after weaning
- Ensuring rams are in optimal condition for joining
- Ensuring weaners are achieving their target weaning weight and target growth rates for optimal productivity and survival
- Helping to meet market specifications by the target sale date.

Monitoring ewe condition score has advantages over liveweight during pregnancy and the dry period, due to the developing fetus and variation in gut fill. A random subsample of at least 50 sheep from the mob allows you to calculate an average condition score for the mob. You can then adjust paddock allocation and/or supplementary feeding as required to meet the condition score targets for each class of sheep.

More Information:

Agriculture Victoria: Choosing an eID tag reader and software: www.awiextensionvic.com/eidreadersoftware

AWI Extension SA: eID equipment, fact sheet: www.awiextensionsa.com/eidfactsheet

LifetimeWool: Reproductive rate of your flock, worksheet: www.wool.com/reproratewkst

Find out more about the state-based AWI Extension Networks at www.wool.com/networks



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WORKSHOP TO HELP YOU PICK PERFORMER EWES

PHOTO: lynnebeclu

AWI has launched a new, one-day workshop aimed at helping woolgrowers lift the lifetime performance, productivity, and value of their Merino ewes. The Picking Performer Ewes workshop identifies the key practical actions that commercial enterprises can implement on-farm to improve the net reproductive rate in a Merino breeding flock.

AWI has developed the Picking Performer Ewes workshop to show woolgrowers running commercial self-replacing Merino enterprises how within-flock selection and enhanced management can increase reproductive rates in their breeding flocks, and lead to consistency of production and business performance – year-in, year-out.

“The top performing Merino ewe-based enterprises generate much higher profits than the industry average. There is enormous potential for the average woolgrower to raise their profits to the level of the top producers. The new Picking Performer Ewes workshop aims to help woolgrowers do this by identifying the ewes in their flock that are performing and those that aren’t,” said AWI National Extension Manager, Emily King.

“In flocks where little to no selection pressure has been placed on breeding ewes, there is scope to increase the overall net reproductive rate of the flock, decrease reproductive wastage, and increase the consistency of production, by simply picking the animals which are producing offspring consistently.

“The new workshop aims to help woolgrowers capitalise on finding and managing the performer ewes that earn you double what the passengers do in their lifetime. Performance varies between seasons, as well as districts, but high weaning rates are achievable in all areas, with astute management.”

Participants in the workshop step through sessions relating to the whole reproductive cycle, with a focus on:

- understanding a ewe’s lifetime performance and economic earnings
- the difference between ewes that are ‘passengers’ and those that are ‘performers’, and the high cost of retaining passengers
- the importance of undertaking the three key performance practices of: scanning, condition scoring and wet & drying at marking
- turning potential into profit by lambing and weaning well
- learning strategies for success, and mapping it all out in a management calendar.



The Picking Performer Ewes workshop will help woolgrowers identify key practical actions to implement on-farm to improve the lifetime reproductive performance of their Merino ewe breeding flock.

The Picking Performer Ewes workshop was piloted in October and will be available across the country next year.

In October, AWI Extension NSW held a 1¼ hour webinar that ran through some of the key points of the Picking Performer Ewes workshop, discussing some key must do’s in flock management to improve ewes’ net reproduction rate. The webinar was recorded and is available to view on demand on the AWI Extension NSW website (details below).

The Picking Performer Ewes workshop complements the AWI-funded Lifetime Ewe Management (LTEM) course, and is ideal as an LTEM refresher but also for those who haven’t completed an LTEM course yet.



AWI Extension NSW Program Manager Megan Rogers conducting a pilot of the Picking Performer Ewes workshop in October.

Passengers and performers – in brief

- Lifetime reproductive performance is a key profit driver in a sheep enterprise; therefore, it is important to identify which ewes are a ‘passenger’ and which are a ‘performer’.
- There is a huge financial difference between the ‘passengers’ (bottom 25%) and ‘performers’ (top 25%).
- Performers rear at least one lamb each year, succeeding at their first two attempts.
- Passengers fail to produce a lamb from their first two attempts – they learn and repeat poor maternal behaviour.
- Passengers are hard to detect visually as maidens and are best removed from the breeding flock after their second failed lambing attempt.
- Merino ewes reach their reproductive peak late in life, as 6–7-year-olds.

“The Picking Performer Ewes workshop demonstrates some critical management practices and strategies that commercial woolgrowers can apply to dial up the lifetime reproductive performance of their flock.”

**Emily King,
AWI National Extension Manager**

More information:

- For more information on the Picking Performer Ewes workshop, visit wool.com/workshops
- If you’d like the workshop to be run in your region, contact your state AWI Extension Network and let them know. Contact details are available at wool.com/networks
- View a recording of the AWI Extension NSW webinar at www.awiextensionnsw.com/webinars

PREPARING YOUR RAMS FOR A FRUITFUL JOINING

RAMping Up Repro workshops give sheep and wool producers the skills to improve ram health, performance and longevity in their commercial sheep enterprises.

Rams are a considerable investment for a woolgrowers' business; with the rams' performance strongly impacted by management and preparation for joining.

To help ensure that woolgrowers get the most from their rams, AWI in partnership with Zoetis Australia six years ago developed the hands-on RAMping Up Repro half-day workshop. The workshop is available across the country, in conjunction with leading deliverers, via the state-based AWI Extension Networks.

AWI National Extension Manager, Emily King, says the workshop is designed to give producers skills across the key components of what drives ram performance, to help improve the profitability of woolgrowers' enterprises.

"As we all know, rams have an important function, and they require careful management and preparation that starts a few months out from the start of joining. The workshop focuses on the timing of preparation of rams, as well as the practical aspects of preparing rams for joining," Emily said.

"Topics covered include nutrition and body condition, animal health and management, checking the 4Ts (teeth, toes, tackle and testicles), managing shearing, assessing for structural soundness, and all things in between."

"Pre-joining ram checks are key to ensuring the whole ram team are ready and able to do their job at joining."

**Emily King,
AWI National Extension Manager**

Each participant is guided through a thorough pre-joining ram inspection by an accredited workshop deliverer and given the opportunity to increase their practical skills to undertake this in their own operation. The workshop is designed to give attendees the confidence to incorporate these skills into their own routine management, thus improving the performance of their rams.

Chance favours the prepared!

Dr Tim Gole of For Flocks Sake, a veterinary-based sheep consultancy business in Dubbo, conducts RAMping Up Repro workshops. His top tip for joining is to get prepared early.

"Chance favours the prepared. Put pre-joining ram examinations in your calendar 12 weeks before joining because then you know you've got enough time to go through your full ram team and action anything that needs doing, such as shear them, vaccinate them, improve their nutrition, clean up feet, clean up horns," he said.

"The semen cycle is six weeks, so if there is anything you need to do to the ram you've got to do it at least six weeks before joining. But also, if you find that a lot of your ram team are B graders, you've got plenty of time to find replacements. Rams are going to add genetic value to your flock for years to come, so you don't want to be searching for new ones on the fly.

"To get on top of preparing rams for joining, I recommend attending a RAMping Up Repro workshop and then simply use the workshop checklist (which is on the AWI website), because it lists everything you need to do."

Warwick Moppett's key learnings from the workshop



Woolgrower **Warwick Moppett** and AWI National Extension Manager **Emily King** on Warwick's family property at Tooraweenah.

Warwick and Kylie Moppett and Peter Moppett, Tooraweenah, run a self-replacing Merino flock across two locations in the central west of NSW at Tooraweenah and Quambone, in a family partnership.

"I attended the Bathurst RAMping Up Repro workshop with a view to increasing our business' engagement in strategic learning, and both our animal production advisor, Emily Pitt, and wool broker, Veronike Hartmeier, recommended the workshop," Warwick said.

"It's for all sheep producers, anyone running sheep should be thinking 'have I got a fit ram team?'"

Warwick says the key learnings his family has implemented are:

- Conduct early pre-joining ram checks to ensure the ram's sperm production is not compromised in the lead up to joining (it takes six weeks for spermatogenesis).
- Improve the pre-joining ram regime so the rams go into joining in optimum condition, fit and fed.
- Review rams after joining is complete.
- Maintain rams as well as ewes are maintained between joining seasons.

"The RAMping Up Repro workshop is also an opportunity to talk to and learn from other growers," Warwick added.

More information:

- For more information on the RAMping Up Repro workshop, visit wool.com/workshops
- If you'd like the workshop to be run in your region, contact your state AWI Extension Network and let them know. Contact details are available at wool.com/networks

OPTIMISING MERINO EWE SURVIVAL AT LAMBING

To help optimise Merino ewe survival around the time leading up to and after lambing (the periparturient period), a new AWI co-funded project is investigating the pattern of Merino ewe periparturient mortality on-farm and will trial practical intervention strategies to reduce it.

The four-year project funded by AWI and MLA involves a team of researchers, veterinarians and consultants working with Merino producers across key Australian wool-producing regions to get to the bottom of Merino ewe mortality and develop best practice management extension material to help producers optimise their ewes' survival.

"With ewes representing the most productive unit in a flock, and Merino ewes making up about two-thirds of Australia's breeding ewe flock, it is important for the Australian sheep and wool industry to optimise the health and survival of these ewes," said AWI General Manager, Research, Bridget Peachey.

"Although we know that ewe losses tend to occur mainly during and around lambing, we want to get a better handle on the incidence and causes of many of these losses in Merino ewes specifically, and develop cost-effective and practical intervention strategies to increase ewe survival rates.

"The research results from the new project will inform revised best practice management that will be made widely available to help adoption by Merino sheep and wool producers."

The new project builds on a recent study that assessed the causes and rates of ewe mortality during the lambing period across commercial maternal flocks.

A review of available Australian literature indicated a range in mortality rates of 2–10% in Merino ewe flocks. However, the method by which mortality is determined could influence that variability. Mortality can, for example, be confirmed by counting carcasses, or be assumed from the difference in numbers between yardings. Without a carcass, the cause of death is harder to determine with certainty.

Causes of Merino ewe mortality

Generally, the cause of death is divided into three categories: those occurring before, during or after lambing. A fourth category can be considered – the deaths that occur around the lambing period not directly caused by pregnancy or lambing, but to which ewes can be more susceptible during this time.

Common causes of death **before lambing** include pregnancy toxæmia, hypocalcaemia, and vaginal prolapse, if followed by complications such as infection or rupture of the vaginal wall. Risk factors include age and litter size, with older ewes or those carrying multiples being at greater risk.

A prolonged or difficult birth (known as dystocia) is a significant cause of Merino ewe death **during lambing**. Dystocia can be due to the lamb's position (such as head back or leg back), or the ewe's physiology (for example a small pelvis). There are many maternal related causes, but the most common in sheep are that the uterus cannot contract and expel the lamb correctly (due to for example hypocalcaemia, or interrupted lambing), or the lamb being too big for the birth canal. Dystocia can lead to death from birthing trauma, which may include haemorrhage or infection. Risk factors for dystocia include ewe age, body condition score, litter size, and lamb birth weight.

Death **after lambing** can often occur due to reproductive tract infections, or mastitis.

Some studies indicate that only about 10% of ewe deaths are investigated by a vet. However, the cause of death can't always be determined by just looking at a carcass. The MLA-funded study *Unlocking the keys to ewe survival* used veterinary post-mortems as well as farm diaries to collect the producer's observations.

This study found that only two-thirds of cases of dystocia (which was a major cause of deaths in these ewes) could be diagnosed by looking at the ewes externally. A post-mortem was needed for a significant number of these cases to be identified as dystocia being the cause of death. However, a post-mortem does not guarantee a diagnosis – one study showed that a cause of death could not be found in up to 20% of mortalities.

Research results to inform best practice

The new project, undertaken by agricultural consulting firm Pinion Advisory, will work closely with at least 42 commercial Merino businesses across WA, SA, Victoria and NSW during lambing to investigate ewe mortality incidence and causes on-farm.

Both producer-kept farm diaries and veterinary-conducted post-mortems will be used to collect data on Merino ewe mortality to determine the pattern of periparturient mortality across farms. This data, together with the recently conducted industry-wide survey on Merino ewe mortality, will inform practical intervention strategies that will be trialled on-farm during the 2025 lambing season.

The final phase of the project will quantify the economic impacts of Merino ewe mortality and intervention strategies at farm and industry levels.

Research findings will leverage existing sheep extension programs to catalyse industry adoption of best practice management beyond the lifetime of the project.

More information: Esmée de Looff, edelooff@pinionadvisory.com



A new AWI co-funded project aims to help woolgrowers optimise Merino ewe survival.

Project host producers: Pip Goldsmith and Ben Keen, Coonamble, NSW

Pip Goldsmith and Ben Keen run 2,500 Merino ewes as part of the family's business at Coonamble on the central-western plains north of Dubbo, NSW.

They are one of the host producer sites on the Merino ewe mortality project, working with Dr Jillian Kelly of Animal Health & Nutrition Consulting at Coonamble.

"My husband Ben Keen and I are in business with my parents, Steve and Babs Goldsmith. We've increased the landholding since Ben and I joined the business 10 years ago to about 4,600 hectares. We run 2,500 Merino ewes and 60 Dorset rams to breed first cross lambs. Additionally, we have broadacre crops across about 1,600 hectares and trade cattle opportunistically," Pip said.

"We like Merinos that are bred in western NSW or Queensland due to their size, shape and tolerance for our often hot, dry climate. Our Merinos each cut about 5kg of 19 micron wool. The Merino offers a quality lamb as well as income from fleece. We produce a crossbred lamb that we will finish on pasture or grain as the season dictates."

Benefits of participation in the project

Pip says farming Merinos in north west NSW has its own particular set of challenges so she appreciates the region being included in the Merino ewe mortality research project.

"We are more variable in our climate, graze a lot more extensively, often on native pastures, and our management during lambing is impacted by distance and environment. It is important that all aspects of running Merinos are represented in this study and we are excited to be included," Pip said.

"I've enjoyed being involved in the project and found great value in having Jill as an active part of our family's business and sheep management program. Participating in the project has also facilitated conversations with other local producers that probably wouldn't have otherwise been had.

"While our involvement in the project will contribute to improved productivity in our own enterprise, it is also rewarding to know that the project will be used to provide evidence for best practice that will benefit the whole industry.

"We hope the information helps producers know what is 'normal, expected or likely' in terms of ewe mortality and helps them hone in what they can do to reduce it."

Management and record keeping

Pip says she is proactive with the management of her family's own ewes, working with Dr Kelly to prepare them for joining and then lambing.

"Animal husbandry has always been one of our core values and something we've always prioritised highly for the success of our business. We look at the condition of the sheep, the pasture, and supplementary feed when necessary. We also scan for pregnancy and manipulate stocking rate to improve lamb and ewe survival," Pip said.

"We pay particular attention to internal and external parasite management around the time of lambing so there are no unwanted surprises that might impact ewe health."

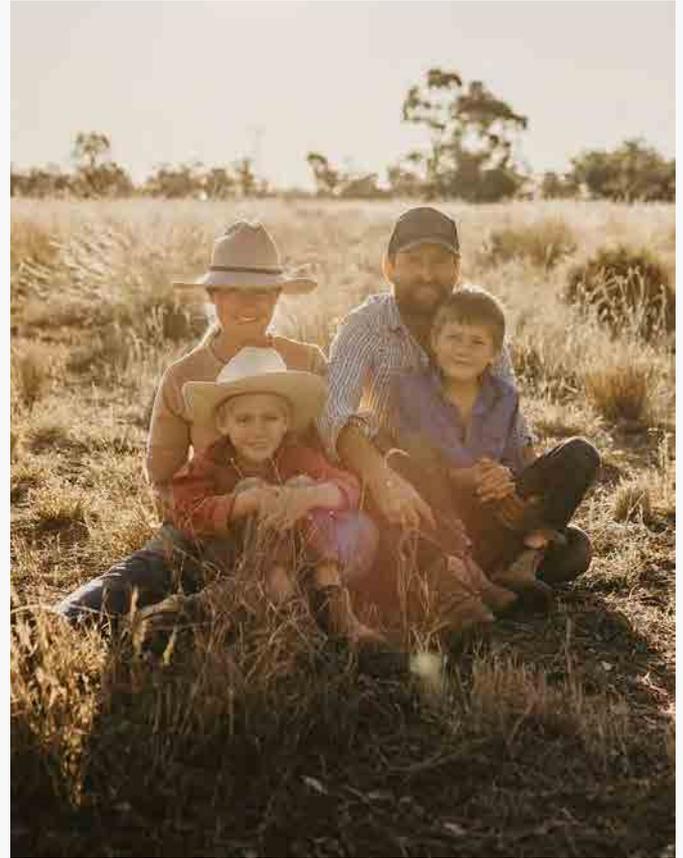
As part of the project, Pip says any deaths and other observations were documented in a more timely way than would normally have been the case, which proved valuable.

"We filled in a lambing diary which made us look at each individual ewe closely. We also had to measure pasture quantity and quality which is extremely beneficial when preparing ewes for lambing," she said.

"An important part of the project was that Jill did post-mortems on any dead ewes we found and it was revealing to see the causes of mortality. It was far more in-depth than we would have done without the project.

"There are some challenges in having different people in the business being involved in record keeping so it's really important for clear communication so that the data we end up with can really tell a story.

"It's one thing to be given a message about what best practice is, but if you see a trend or marker in your own management, it gives you such great confidence in decision making and future management of the enterprise."



Pip Goldsmith and Ben Keen with their two sons

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MLP INSIGHTS: IMPROVING REPRODUCTION RATES



MLP QUICK FACTS

The AWI-funded MLP project is a \$13 million (\$8 million from AWI plus \$5 million from project partners), 10-year venture between AWI, the Australian Merino Sire Evaluation Association (AMSEA), nominating stud Merino breeders and site partners.

- Balmoral, Vic
Partner: Tuloona Pastoral Committee; Balmoral Breeders Association
- Pingelly, WA
Partner: Murdoch University/UWA Committee: Federation of Performance Sheep Breeders (WA Branch)
- MerinoLink, Temora, NSW
Partner: Moses & Son Committee: MerinoLink Inc.
- Macquarie, Trangie, NSW
Partner: NSW DPI Committee: Macquarie Sire Evaluation Association
- New England, NSW
Partner: CSIRO Committee: New England Merino Sire Evaluation Association

The MLP project has tracked the lifetime performance of 5,700 ewes as they proceeded through four to five joinings and annual shearings.

A full suite of assessments has been taken on the ewes including visual trait scoring, classer gradings, objective assessments of a range of key traits and index evaluations along with a DNA genotype at the start and end of their lives.

A unique and extensive dataset has been created that is being used to enhance existing Merino breeding and selection strategies, for both ram sellers and buyers, to deliver greater lifetime productivity and woolgrower returns now and into the future.

To stay up to date with the latest MLP findings, visit www.wool.com/MLP.

Subscribe to MLP updates via www.merinosuperiorsires.com.au/contact-us

Analysis of the extensive set of sheep assessment data gathered during the operation of the MLP project continues. Part of the analysis has examined how estimates of genetic performance for reproduction (Weaning Rate) changes over time. Read on for a summary of the results.

Enhanced productivity and profitability in Merino flocks is often achieved through increased weaning rates. Addressing higher reproduction rates through genetic improvements has been challenging for the Merino industry due to the trait's low heritability and the complexity of recording it.

The Merino Lifetime Productivity (MLP) project has played an important role in generating a large volume of reproduction data that has led to robust estimates of genetic performance for a wide range of Merino sires.

Additionally, the project has facilitated important research to inform future breeding strategies to improve reproduction.

At the MerinoLink annual conference held in June, Postdoctoral Research Fellow Dr Peter Wahinya of UNE's Animal Genetics and Breeding Unit (AGBU) presented research work from the MLP project that explored how well early-life performance has predicted lifetime performance and how genetic estimates changed over time.

He also explored the role of genomics in enhancing early in life reproduction genetic estimates.

Genomics is the study of an animal's DNA, which helps us estimate how an animal is genetically predisposed for important traits like wool production, growth, disease resistance, and reproduction.

In the MLP project, DNA was collected from all ewes through small tissue samples and sent to a laboratory for analysis. The results from the DNA profiling are then combined by MERINOSELECT with the ewes' recorded data to create genomically enhanced Australian Sheep Breeding Values (ASBVs).

Reproduction breeding values are estimated from evaluating female progeny of sires for conception, litter size and their ability to raise a lamb which is combined into the trait known as Weaning Rate (WR).

To achieve an accurate estimate of a sire's breeding value for WR requires a sufficiently large number of daughters with reproduction records, ideally collected over repeat reproduction events.

Weaning Rate - Flock Breeding Value correlations over time

At the MerinoLink conference, Peter shared an example of work from the MLP project's MerinoLink site, where thirteen sires were progeny tested in each drop, with 29 and 34 ewe progeny per sire for the 2016 and 2017 drops respectively. The sires' WR breeding values were calculated using their daughters records without the benefits of genomic information.

Figure 1 opposite shows correlation plots between lifetime WR Flock Breeding Values (FBV) and FBVs estimated using cumulative reproduction data at each stage of assessment. In the charts, 'Data up to A2' denotes FBVs based on the first joining. 'Data up to A3' uses the first and second joining, 'Data up to A4' uses data from the first to third joinings and 'Data up to A5' uses data from the first to the fourth joinings. We refer to the 'Data up to A5' FBV results as the lifetime data in this article.

One reproduction event record produced a correlation of 0.72 with lifetime performance, while two records increased this to 0.85. Maiden ewe (first-time lambing ewe) performance often differs from that of older ewes due to physical and behavioural immaturity.

Peter has extended this work to explore how breeding values change across all the MLP sites and has shown that the relationship between lifetime WR and each stage of reproduction assessment ranged from 0.61 to 0.96 for FBVs, and 0.89 to 0.99 for ASBVs, with the lowest correlations observed in breeding values estimated from reproduction data of maiden ewes.



Dr Wahinya at the 2024 MerinoLink Conference.

Figure 1: MerinoLink Weaning Rate FBVs change over time

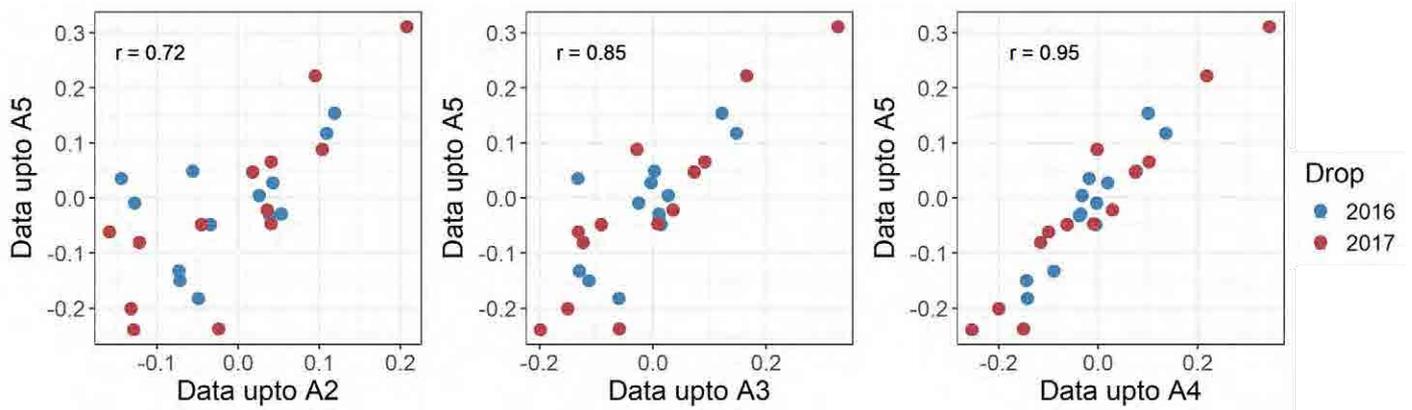
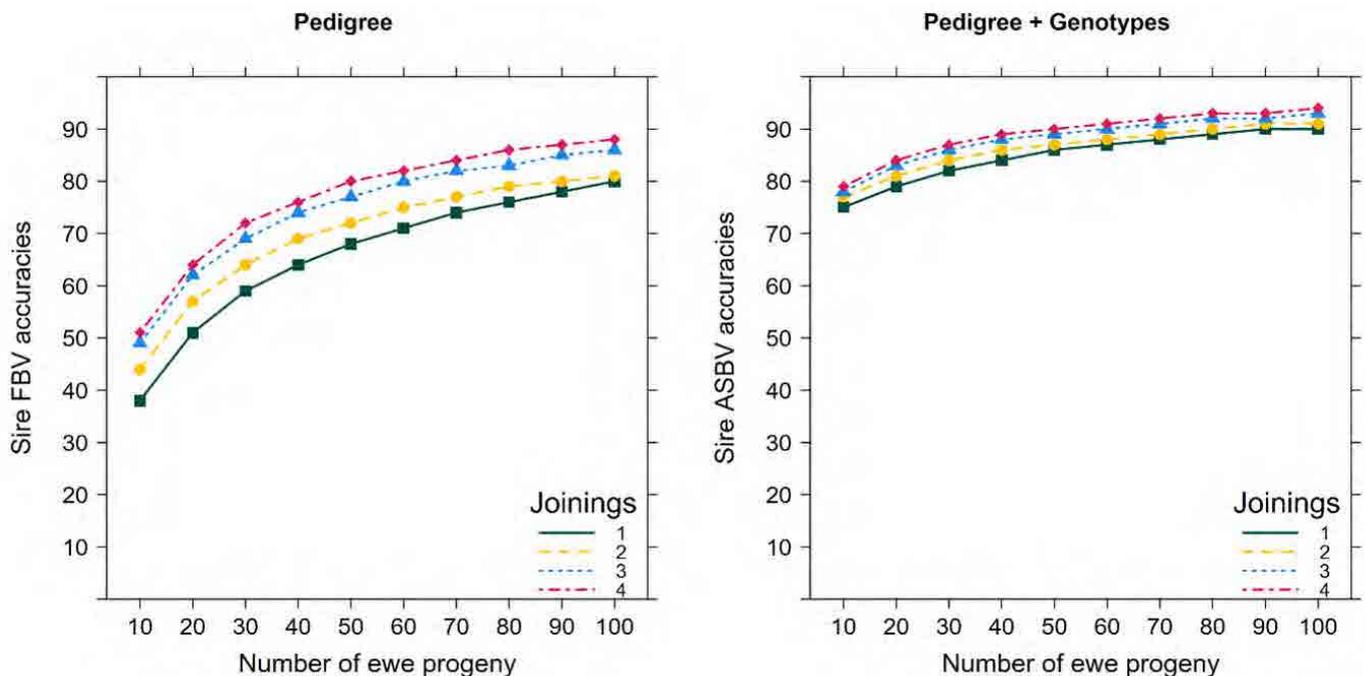


Figure 2: Benefits of genomics in estimating Weaning Rate, MLP simulation study



Weaning Rate - Flock Breeding Value accuracy

Peter has also undertaken a simulation study that used data from the MLP project to estimate how accurate the WR FBVs are when different numbers of ewe progeny are evaluated and with varying numbers of repeat joinings. He then compared these results to the accuracy of ASBVs for the same scenario and assumed that all sires and ewe progeny had been genomically tested.

Breeding value accuracies range from 0% to 100%, indicating how closely the estimated breeding value aligns with the true breeding value. An accuracy of 100% means the estimated breeding value perfectly matches the true value. If the accuracy is below 100%, there is a likelihood that the estimated breeding value may change.

The simulation study indicated a significant improvement in the accuracy of WR FBV estimates as the number of ewe progeny assessed per sire increased, particularly when repeat joinings were available (refer to the charts in Figure 2). The most significant

impact of repeat joinings is observed when fewer ewe progeny are evaluated per sire. When compared to ASBVs for reproduction, which include genomic data, it was found that high accuracy can be achieved with a smaller number of ewe progeny evaluations and fewer reproduction events.

Wrap up

The key takeaway from Peter's work is that the accuracy of WR breeding values improves with the number of a sire's progeny evaluated. Genotyping is expected to lead to substantial accuracy gains for reproduction traits and recording multiple mating events will likely further enhance accuracy and reduce bias.

The MLP project has significantly contributed to the Merino reproduction genomics reference population by providing lifetime reproduction data for more than 4,800 ewes (resulting in more than 20,000 weaning rate records). This contribution has enabled the industry to access more accurate reproduction estimates through genomic testing.

With the MLP dataset now complete, Peter is analysing correlations between all measured and visual traits across different age stages. He is also estimating the heritability of these traits and assessing the impact of factors like birth type, rear type, reproduction, and lactation on performance.



SAVE THE DATE

Catch the next industry MLP project update at the **Balmoral Sire Evaluation field day** on 7 March 2025.

Or jump the ditch and head to the **AAAGB conference** which will run from 24 to 27 June in Queenstown, New Zealand.

MERINOSELECT ASBVS BY FIBRE DIAMETER AND THEIR GENETIC TRENDS

There are significant production differences in Merino sheep that can be highlighted by grouping animals based on fibre diameter. Over the past 200 years, selective breeding, differences in climatic conditions and markets, and different historical breed groups – such as the Saxon, Spanish, Rambouillet, Peppin, and English Long Wools – have all contributed to these differences.

On the opposite page ram breeder flocks have been grouped into five categories based on their average Adult Fibre Diameter (AFD) Australian Sheep Breeding Value (ASBV). Table 1 highlights the production data for each category, while Tables 2 through 6 detail the genetic trends within these categories since 2000. Despite significant antagonisms between some traits, ram breeders in all categories continue to achieve progress in key traits. Some individual ram breeders outperform the averages. The entry of new breeders or increased phenotyping of traits by existing breeders have not had significant impacts on the overall or diameter category trait trends.

Table 1 outlines the average ASBVs for a range of traits (wool, carcass, reproduction, parasite-related traits for worms and flies, and four key industry indexes) for the 2022 drop progeny, from flocks grouped into five AFD ASBV categories (<-3, -3 to -2, -2 to -1, -1 to 0, and 0 to +1). This data, sourced from AGBU/MERINOSELECT, serves as a benchmark for Merino breeders aiming to set realistic and impactful ASBV targets based on their flock's adult micron ASBV.

By setting slightly improved targets within their AFD category for key economic and welfare traits, breeders can significantly enhance the index most relevant to their micron type and production system.

Performance across fibre diameter categories

- **Super fine wool flocks (<-3.0 AFD ASBV):** These flocks perform well not only in fibre diameter and the Fine Wool Index, but also in traits such as Eating Quality (IMF and Shear Force), Worm Resistance, Wool Colour, Fleece Rot and Wool Character. However, they relatively underperform other micron types in Fleece Weight, Staple Length, Body Weight, Litter Size, Breech Wrinkle, and Breech Wool Cover.
- **Mid-micron wool flocks (-1 to 0 AFD ASBV):** These flocks perform well for Fleece Weight, Body Weight, Fat, Eye Muscle Depth, Weaning Rate, Breech Wrinkle, Breech Wool Cover, and the Merino Lamb Index. However, they lag in IMF and Shear Force, Wool Colour, Fleece Rot, and Wool Character.

Of note are:

1. **Genetic diversity:** Merinos display significant variation in fibre diameter and body weight across categories.

2. **Reproduction trends:** Higher micron categories exhibit higher weaning rates driven by increased litter size.
3. **Wrinkle vs. fleece rot:** Low-micron flocks have higher breech wrinkle scores and lower fleece rot, while high-micron flocks exhibit the opposite. Selecting for lower breech wrinkle (lower risk of breech strike) can often result in increased fibre diameter, wool colour issues, fleece rot and higher risk of body strike.
4. **Eating quality:** Super fine flocks tend to perform well for eating quality, but improvements in IMF and Shear Force can now be actively selected for all Merino types. These trends are more important with the very recent announcement of a cost effective reasonable line speed test for IMF.

Genetic gains since 2000

Tables 2–6 demonstrate genetic trends in key traits, including fleece weight, fibre diameter, and breech wrinkle. While breeders across all micron groups have made consistent gains, distinct trends are evident:

- **Low-micron breeders (<-3 AFD):** Have focused heavily on reducing fibre diameter and improving worm resistance, while other breeders have reduced their emphasis on worm resistance.
- **Mid-micron breeders (-1 to 0 AFD):** Have balanced improvements across multiple traits, including fat, muscle, fleece weight, fibre diameter, reproduction, and wrinkle.
- **High-micron breeders (0 to +1 AFD):** Have achieved significant gains in fat and muscle but at the expense of fleece weight, micron, wool colour, and shear force (perhaps

unnecessarily given mid micron breeder trends and relative indexes).

The tables are averages for each micron category and some individual breeders are making faster changes than others. It is hoped that some new structural assessment ASBVs, like feet and backs, will be introduced soon so these traits can also be objectively monitored.

Emerging trends and opportunities

- **Reproduction components:** MERINOSELECT now reports the three component traits: Conception, Litter Size, and Ewe Rearing Ability along with Weaning Rate. While weaning rate gains have primarily come from increased litter size, there is now potential to specifically improve ewe rearing ability as well.
- **Economic and welfare priorities:** Most breeding programs focus on high-impact economic and welfare traits. However, adapting to changing markets and climatic conditions, such as micron premiums or parasite pressures, requires time to collect the measurements and gain genetic momentum in a balanced manner.

While genetic trends reflect change across key traits, the pace of improvement is influenced by breeders' emphasis on specific traits, the expanding number of traits being selected, current market demands and predictions of future market demands. Detailed analysis of the trends have shown that new breeders and expanded phenotyping by existing breeders don't significantly bias the trends.

More information: Geoff Lindon, AWI Program Manager Genetics and Animal Welfare Advocacy, Geoff.Lindon@wool.com

Table 1. 2022 drop MERINOSELECT ram breeder animals, above a minimum accuracy, allocated into micron ranges based on the flock's average AFD ASBV over the last five years

Indicative ave AFD of flock	Flock ave FD ASBV	Birth year	Animals recorded	Wool				Carcass					Reproduction					
				YFD	AFD	YGFW	ACFW	YSL	YWT	AWT	YFAT	YEMD	IMF	SF5	WR	CON	LS	ERA
				micron	micron	%	%	mm	kg	kg	mm	mm	%	kg	Lamb/ewe	Ewe preg	Lamb/litter	Wean/born
15-16	<-3	2022	2,404	-3.08	-3.34	5.2	5.2	1.0	0.5	-1.0	0.20	0.36	0.50	-0.22	0.08	0.02	0.03	0.03
16-17	-3 to -2	2022	15,761	-2.33	-2.44	13.3	13.3	3.2	2.9	1.8	-0.25	-0.14	0.02	0.95	0.07	0.01	0.05	0.01
17-18	-2 to -1	2022	60,179	-1.33	-1.39	14.2	13.7	7.4	5.9	5.0	-0.08	0.36	-0.36	1.56	0.11	0.02	0.07	0.03
18-19	-1 to 0	2022	63,384	-0.56	-0.61	15.3	14.2	11.1	7.0	5.8	0.23	0.82	-0.28	1.40	0.15	0.04	0.09	0.03
19-21	0 to +1	2022	4,868	0.23	0.32	12.4	12.0	15.2	8.2	7.3	1.05	1.77	-0.14	0.62	0.18	0.04	0.13	0.03
	Total/ave	2022	146,596	-1.08	-1.14	14.4	13.7	8.7	6.1	5.0	0.08	0.55	-0.26	1.36	0.12	0.03	0.08	0.03

Indicative ave AFD of flock	Flock ave FD ASBV	Birth year	Animals recorded	Worms		Flystrike					Index			
				YWEC	EBWR	EBCOV	LDAG	LCOL	LFROT	LCHAR	FW	WP	SM	ML
				%	Score	Score	Score	Score	Score	Score	Points	Points	Points	Points
15-16	<-3	2022	2,404	-28.4	0.43	0.18	-0.01	-0.81	-0.27	-0.54	175	160	132	116
16-17	-3 to -2	2022	15,761	0.3	0.25	0.09	-0.02	-0.51	-0.14	-0.42	172	163	133	118
17-18	-2 to -1	2022	60,179	-0.6	-0.19	-0.07	-0.05	-0.19	-0.06	-0.36	159	156	135	122
18-19	-1 to 0	2022	63,384	-16.6	-0.44	-0.17	-0.12	-0.09	-0.09	-0.19	154	155	139	127
19-21	0 to +1	2022	4,868	-14.8	-0.62	-0.41	-0.22	0.12	0.01	0.15	135	140	133	127
	Total/ave	2022	146,596	-8.3	-0.25	-0.11	-0.08	-0.18	-0.08	-0.28	158	156	136	124

Table 2. Genetic trends of MERINOSELECT ram breeder animals with flock AFD ASBV <-3 over last five years, above accuracy thresholds

Birth year	Animals recorded	YWT	AWT	YFAT	YEMD	YGFW	ACFW	YFD	YWEC	IMF	SF5	WR	CON	LS	ERA	EBWR	EBCOV	LDAG	LCOL	LFROT	FW	WP	SM	ML
		kg	kg	mm	mm	%	%	micron	%	%	kg	Lamb/ewe	Ewe preg	Lamb/litter	Wean/born	Score	Score	Score	Score	Score	Points	Points	Points	Points
2000	1,246	-2.3	-3.2	0.29	0.50	-7.9	-4.8	-1.70	-11.8	0.22	-0.35	0.03	0.04	-0.02	0.00	0.65	0.42	0.19	-0.62	-0.33	126	116	105	101
2005	2,606	-3.4	-4.0	0.37	0.52	-10.4	-6.5	-2.40	-14.5	0.55	-1.07	0.03	0.02	0.00	0.00	0.43	0.30	-0.01	-0.70	-0.32	132	119	103	101
2010	2,575	-2.8	-3.4	0.23	0.34	-9.3	-5.8	-2.68	-20.3	0.62	-1.10	0.02	0.01	0.01	0.01	0.41	0.19	-0.07	-0.72	-0.21	142	126	111	104
2015	2,742	-1.9	-2.6	0.21	0.30	-4.6	-1.1	-2.90	-25.6	0.59	-0.66	0.05	0.02	0.01	0.01	0.56	0.23	0.04	-0.73	-0.22	154	137	117	107
2020	2,549	-0.4	-1.6	0.19	0.26	3.2	3.9	-3.14	-26.1	0.54	-0.39	0.06	0.01	0.02	0.02	0.57	0.22	-0.01	-0.82	-0.22	171	152	127	113
2022	2,404	0.5	-1.0	0.20	0.36	5.2	5.2	-3.08	-28.4	0.50	-0.22	0.08	0.02	0.03	0.03	0.43	0.18	-0.01	-0.81	-0.27	175	160	132	116
Change since 2000		2.9	2.2	-0.09	-0.14	13.1	10.0	-1.38	-16.6	0.27	0.13	0.05	-0.02	0.05	0.03	-0.22	-0.24	-0.19	-0.19	0.05	49	43	27	15

Table 3. Genetic trends of MERINOSELECT ram breeder animals with flock AFD -3 to -2 over last five years, above accuracy thresholds

Birth year	Animals recorded	YWT	AWT	YFAT	YEMD	YGFW	ACFW	YFD	YWEC	IMF	SF5	WR	CON	LS	ERA	EBWR	EBCOV	LDAG	LCOL	LFROT	FW	WP	SM	ML
2000	3,661	-1.9	-2.5	0.30	0.33	-3.4	1.1	-1.38	1.7	0.16	-0.92	-0.03	0.00	-0.02	-0.01	0.29	0.08	0.06	-0.10	0.08	122	118	98	97
2005	6,477	-2.1	-2.6	0.26	0.17	-3.6	0.1	-2.05	-10.1	0.25	-0.36	0.00	0.01	-0.02	0.00	0.13	0.09	-0.04	-0.27	-0.09	133	124	102	98
2010	11,494	-0.5	-0.9	-0.02	0.04	3.8	6.3	-2.01	-5.9	0.18	0.17	0.00	0.00	0.00	0.00	0.22	0.09	-0.02	-0.31	-0.13	144	134	112	106
2015	13,369	0.9	0.1	-0.21	-0.19	7.5	8.9	-2.20	-10.2	0.14	0.59	0.02	-0.01	0.03	0.00	0.32	0.07	0.03	-0.33	-0.02	156	146	121	111
2020	17,928	2.1	1.1	-0.26	-0.17	10.4	10.7	-2.28	1.1	0.05	0.82	0.07	0.01	0.05	0.01	0.34	0.08	-0.01	-0.44	-0.06	166	157	129	115
2022	15,761	2.9	1.8	-0.25	-0.14	13.3	13.3	-2.33	0.3	0.02	0.95	0.07	0.01	0.05	0.01	0.25	0.09	-0.02	-0.51	-0.14	172	163	133	118
Change since 2000		4.8	4.3	-0.55	-0.48	16.7	12.2	-0.95	-1.4	-0.14	1.87	0.10	0.01	0.07	0.02	-0.05	0.01	-0.08	-0.41	-0.22	50	45	35	21

Table 4. Genetic trends of MERINOSELECT ram breeder animals with flock AFD -2 to -1 over last five years, above accuracy thresholds

Birth year	Animals recorded	YWT	AWT	YFAT	YEMD	YGFW	ACFW	YFD	YWEC	IMF	SF5	WR	CON	LS	ERA	EBWR	EBCOV	LDAG	LCOL	LFROT	FW	WP	SM	ML
2000	8,986	-0.3	-0.5	0.06	0.16	1.2	2.9	-1.25	12.3	0.08	-0.11	-0.01	0.01	-0.01	0.00	0.01	-0.13	0.01	-0.12	0.02	123	118	107	105
2005	13,605	1.5	1.3	0.00	0.16	2.5	4.1	-1.31	4.3	-0.13	0.63	0.00	0.00	0.02	0.00	-0.02	-0.07	0.01	-0.18	-0.06	132	127	114	107
2010	20,059	2.1	1.6	-0.05	0.18	4.4	5.6	-1.46	8.9	-0.18	0.95	0.01	-0.01	0.02	0.00	-0.06	-0.04	-0.03	-0.24	-0.09	138	132	117	109
2015	42,314	3.1	2.5	-0.19	0.09	8.5	9.1	-1.41	-2.3	-0.26	1.28	0.04	0.01	0.04	0.01	-0.10	-0.04	0.02	-0.19	-0.08	146	141	123	113
2020	62,515	4.8	4.0	-0.13	0.24	12.5	12.6	-1.32	1.2	-0.33	1.50	0.09	0.02	0.06	0.02	-0.12	-0.05	-0.02	-0.17	-0.05	154	150	131	119
2022	60,179	5.9	5.0	-0.08	0.36	14.2	13.7	-1.33	-0.6	-0.36	1.56	0.11	0.02	0.07	0.03	-0.19	-0.07	-0.05	-0.19	-0.06	159	156	135	122
Change since 2000		6.3	5.5	-0.14	0.20	13.0	10.8	-0.08	-12.9	-0.44	1.67	0.12	0.02	0.08	0.03	-0.20	0.06	-0.06	-0.07	-0.08	37	38	28	17

Table 5. Genetic trends of MERINOSELECT ram breeder animals with flock AFD -1 to 0 over last five years, above accuracy thresholds

Birth year	Animals recorded	YWT	AWT	YFAT	YEMD	YGFW	ACFW	YFD	YWEC	IMF	SF5	WR	CON	LS	ERA	EBWR	EBCOV	LDAG	LCOL	LFROT	FW	WP	SM	ML
2000	1,626	2.9	2.4	0.13	0.09	6.5	8.5	-0.38	-7.1	-0.06	-0.23	0.02	0.01	0.07	-0.03	0.01	-0.13	0.11	0.17	0.06	124	125	111	108
2005	11,682	3.3	2.9	0.14	0.41	8.6	9.8	-0.69	-17.0	-0.05	0.30	0.06	0.01	0.05	0.00	-0.04	-0.09	-0.04	-0.05	-0.07	133	133	118	113
2010	15,671	4.3	3.4	0.12	0.49	8.6	9.3	-0.65	-25.7	-0.05	0.40	0.08	0.02	0.05	0.02	-0.13	-0.09	-0.04	0.05	-0.05	137	136	124	117
2015	32,909	4.6	3.8	0.07	0.42	10.8	11.8	-0.69	-20.6	-0.15	0.90	0.07	0.01	0.04	0.02	-0.21	-0.12	-0.07	-0.14	-0.08	143	143	128	118
2020	64,926	5.8	4.8	0.11	0.55	13.5	13.6	-0.63	-12.7	-0.25	1.17	0.12	0.03	0.07	0.03	-0.36	-0.16	-0.09	-0.11	-0.07	150	150	134	123
2022	63,384	7.0	5.8	0.23	0.82	15.3	14.2	-0.56	-16.6	-0.28	1.40	0.15	0.04	0.09	0.03	-0.44	-0.17	-0.12	-0.09	-0.09	154	155	139	127
Change since 2000		4.1	3.4	0.10	0.73	8.8	5.7	-0.18	-9.4	-0.22	1.62	0.13	0.03	0.02	0.06	-0.45	-0.05	-0.23	-0.26	-0.15	31	31	27	19

← Continued from previous page

Table 6. Genetic trends of MERINOSELECT ram breeder animals with flock AFD 0 to 1 over last five years, above accuracy thresholds

Birth year	Animals recorded	YWT	AWT	YFAT	YEMD	YGFW	ACFW	YFD	YWEC	IMF	SF5	WR	CON	LS	ERA	EBWR	EBCOV	LDAG	LCOL	LFROT	FW	WP	SM	ML
		kg	kg	mm	mm	%	%	micron	%	%	kg	Lamb/ewe	Ewe preg	Lamb/litter	Wean/born	Score	Score	Score	Score	Score	Points	Points	Points	Points
2000	2,243	3.8	3.7	0.42	0.52	14.4	17.6	0.01	-3.2	-0.13	2.04	0.04	-0.02	0.00	0.05	-0.63	-0.27	-0.25	-0.08		113	131	119	110
2005	2,346	4.9	4.6	0.24	0.67	14.9	17.9	0.13	1.3	-0.18	1.41	0.07	-0.01	0.04	0.04	-0.86	-0.39	-0.23	0.53	0.35	129	136	122	114
2010	1,077	5.7	5.7	0.30	0.87	12.2	15.8	0.19	-17.4	-0.32	1.58	0.12	0.01	0.06	0.04	-0.84	-0.36	-0.21	0.28	0.14	128	136	125	120
2015	4,298	6.2	5.7	0.47	0.97	10.2	11.9	0.24	-11.5	-0.36	1.24	0.12	0.01	0.08	0.04	-0.38	-0.13	0.00	0.00	0.05	117	124	121	116
2020	6,102	7.2	6.4	0.83	1.50	11.4	11.9	0.27	-5.4	-0.23	0.96	0.14	0.03	0.11	0.03	-0.68	-0.40	-0.20	0.06	0.03	128	135	126	121
2022	4,868	8.2	7.3	1.05	1.77	12.4	12.0	0.23	-14.8	-0.14	0.62	0.18	0.04	0.13	0.03	-0.62	-0.41	-0.22	0.12	0.01	135	140	133	127
Change since 2000		4.3	3.6	0.63	1.25	-2.0	-5.6	0.22	-11.6	-0.01	-1.43	0.13	0.05	0.13	-0.01	0.01	-0.14	0.03	0.20	0.01	22	9	14	17

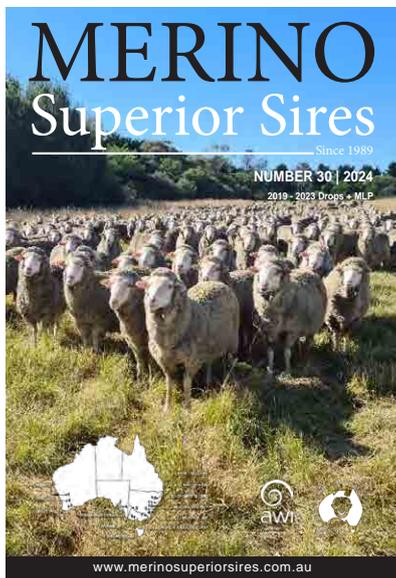
Abbreviations: YFD Yearling Fibre Diameter, AFD Adult Fibre Diameter, YGFW Yearling Greasy Fleece Weight, ACFW Adult Clean Fleece Weight, YSL Yearling Staple Length, YWT Yearling Body Weight, AWT Adult Body Weight, YFAT Yearling Fat, YEMD Yearling Eye Muscle Depth, IMF intramuscular fat, SF5 Shear Force, WR Weaning Rate, Con Conception, LS Litter Size, ERA Ewe Rearing Ability, YWEC Yearling Worm Egg Count, EBWR Early Breech Wrinkle, EBCOV Early Breech Cover, LDAG Late Dag, LCOL Late Wool Colour, LFROT Late Fleece Rot, LCHAR Late Wool Character, FW Fine Wool Index, WP Wool Production Index, SM Sustainable Merino Index, ML Merino Lamb Index.

Source: AGBU and MLA Sheep Genetics – MERINOSELECT. 25 July 2024 MERINOSELECT run.

Notes: Flock progeny have been allocated into micron categories based on their flock average AFD ASBV over the last five years. Tables include ram breeder flocks only; R&D and Sire Evaluation progeny are not included. Animals with low accuracy are not included. Flocks averaging over +1 AFD ASBV have not been included.

MERINO SUPERIOR SIRES NO 30 NOW AVAILABLE

Having commenced providing services to ram breeders and commercial woolgrowers alike in 1989, Merino Sire Evaluation continues to grow in Australia. The 30th edition of the annual Merino Superior Sires publication demonstrates the volume, quality and diversity of the sires that are entered.



2024 marks the release of the 30th edition of the sought-after industry resource Merino Superior Sires. Published annually by the Australian Merino Sire Evaluation Association (AMSEA), Merino Superior Sires details both the measured and visual performance of well over 400 sires entered at any one of the 12 Merino Sire Evaluation sites operating across Australia.

Published in Merino Superior Sires are Australian Sheep Breeding Values (ASBVs) for a wide range of both measured and visually classed traits that are collected as part of the rigorous and independent assessment program

that AMSEA oversees through its network of industry managed sites. In addition, an independent Classifier's Grade is also reported giving users an insight into the conformation and wool quality traits that are not expressed through an ASBV.

One of the key features of Merino Sire Evaluation is that sites carry out assessments at the hogget or adult stage. This is significantly later compared to many on farm assessments and adds accuracy and robustness to the results published.

A major change to Merino Superior Sires in 2024 is the inclusion of the four new MERINOSELECT Indexes. The Fine Wool (FW), Wool Production (WP), Sustainable Merino (SM) and Merino Lamb (ML) indexes, which were released earlier this year, are important tools to help drive genetic improvements. Each of these indexes combine multiple traits, or ASBVs, into a single value that reflects a certain production emphasis on these traits. Collectively, these traits make up the breeding objective of the index which aims to improve profitability in commercial sheep enterprises.

The four indexes provide for a range of breeding objectives that are common across sheep breeding programs.

- **Fine Wool (FW)** – The majority of the income is from the wool clip, with a strong focus on reducing micron.
- **Wool Production (WP)** – The majority of the income is from the wool clip, with a strong focus on increasing wool production.

- **Sustainable Merino (SM)** – The majority of the income is from the wool clip, and sheepmeat production is balanced.
- **Merino Lamb (ML)** – The majority of the income is from sheepmeat production, particularly lambs, with some income from the adult ewe wool clip.

Each of these new indexes is reported on every sire entered as well as in the Top 50 reports, which rank sires for each of the indexes alongside a range of relevant traits. In a sign of the genetic gain being made in the industry, many of the sires ranked are young sires that are being published in Merino Superior Sires for the first time.

Once again this year, a number of additional reports have also been released exclusively via the Merino Superior Sires website in conjunction with the online and hardcopy Merino Superior Sires 30. The Top 20 highly used sires has once again been published, along with an All Time Top 50 for each of the four new MERINOSELECT indexes which includes rams from the past 30 years of sire evaluation trials.

Merino Superior Sires No 30 is available for download at www.merinosuperiorsires.com.au or in hard copy by contacting merinosuperiorsires@bcsagribusiness.com.au

More information: Ben Swain, AMSEA Executive Officer, 0427 100 542, ben.swain@bcsagribusiness.com.au



TINY TECH IN BIG BATTLE WITH BLOWFLIES

PHOTO: Thinkhubstudio

A new project aims to use nanotechnology to develop a tea tree oil biopesticide that provides prolonged, safe and residue-free flystrike protection for sheep.

Chemical resistance in sheep blowflies is compromising the effectiveness of current sheep flystrike chemical control options, and there is potential for their access to be further restricted due to workplace health and safety, and residue and environmental concerns.

A solution could be to use eco-friendly biopesticides made from natural essential oils like tea tree oil.

Unfortunately, when biopesticides are applied as a blowfly repellent using current delivery methods, the biopesticides have shorter protection periods and lack potency compared to the available chemical options. This means that, to date, biopesticides have not been a practical option for woolgrowers.

However, nanotechnology might provide a solution. Nanotechnology is essentially the study of very small things – nanoparticles less than a thousandth of a millimetre in size. Building on previous AWI investment in nanotechnology for flystrike control, researchers are developing a promising new method of delivering biopesticides that provide extended protection and are softer on the environment.

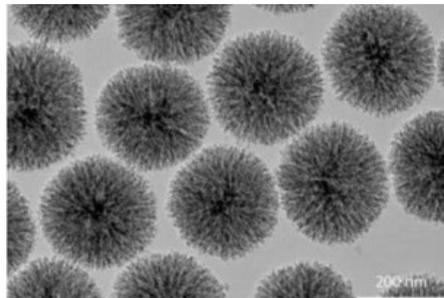
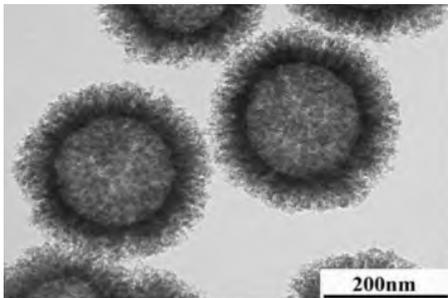
“Led by the Queensland Government’s Department of Primary Industries, this project will design and test natural and environmentally friendly tea tree oil nano-formulations to give prolonged periods of protection against flystrike, with minimal residues and off-target effects,” said AWI Program Manager, Animal Wellbeing and Industry Resilience, Carolina Diaz.

“Tea tree oil, an essential oil extracted from the Australian tea tree plant, is already being used in many external parasitic treatments such as human lice treatments, domestic pet tick control and fly repellent.

“Previous AWI investment into nanotechnology for flystrike control, carried out by the University of Queensland, has already demonstrated the ability of silica nanoparticles to provide extended periods of protection in laboratory tests. This project aims to design and develop a nanoformulation that can be loaded with Australian tea tree oil to extend protection against flystrike when applied to sheep.”

Research began earlier this year and is planned to run for the next two years. However, the project has a clear stop/go point next year linked to whether the researchers can demonstrate the effectiveness of the formulation against sheep blowfly in the lab and hence whether the project should progress to animal trials.

The research is co-funded by AWI, Beef + Lamb New Zealand and AgriFutures (representing the tea tree oil industry). The Queensland Government’s Department of Primary Industries and the University of Queensland are providing in-kind contributions. In-kind contributions of technical expertise and tea tree oil for the trials is also being provided by Main Camp, the largest tea tree oil producer in Australia.



Tiny silica nanoparticles with surface spikes purpose-built to give prolonged periods of protection against flystrike could be a game changer when filled with biopesticides like tea tree oil.

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VITAL MANAGEMENT OF CHEMICAL RESIDUES

It is critical that woolgrowers understand and comply with the regulatory limits when using chemical products on their sheep. Following the rules not only optimises the welfare of the sheep, but it also maximises the safety of the operator, the health of the environment and the positive eco-credentials of Australian wool in the marketplace.

Woolgrowers rely on a range of animal health products to protect their sheep from internal and external parasites such as worms, lice and blowflies. One consequence of using chemical products is the potential presence of residues in body tissues and wool for a period after the product's application.

For all registered veterinary products in Australia, there are in place regulatory time periods following the chemical's application that indicate when the residue that remains in or on meat and wool products will not exceed the maximum residue limit (MRL).

The Australian Pesticides and Veterinary Medicines Authority (APVMA) sets MRLs for all registered veterinary chemicals in agricultural produce. To find out the time constraints, always read the product label or view the APVMA or ParaBoss websites (see the 'More information' section below).

AWI Program Manager, Animal Wellbeing and Industry Resilience, Carolina Diaz, says the mandatory time constraints have been set to ensure lamb and sheep meat is safe to eat, wool and sheep are safe to handle, and wool scour effluent is safe for the environment.

"It is extremely important that woolgrowers comply with the mandatory time constraints following the application of chemicals to their sheep," Carolina said.

"As well as minimising any harmful impacts of chemicals on farm workers, it also helps establish the fibre's positive eco credentials amongst environmental rating agencies, governments, the textile trade and consumers.

"It's especially critical for woolgrowers to take extra care if they treat their sheep outside of their usual timetable or have had to change their shearing schedules."

"Effective chemical residue management ensures the wool is suitable for sale into markets that are increasingly concerned about the provenance of their products, including residues remaining on fibres."

Carolina Diaz, AWI Program Manager

What are the important time periods?

Sheep rehandling interval (SRI)

The SRI is the time between treatment and when wool or sheep can be safely handled without the need for protective clothing. If an SRI is included on a product label, this must be observed to protect those handling the sheep or wool, and to protect the environment in the case of wool processing residues. For some products, the SRI is short, only requiring the product to become dry on the sheep.

Wool harvest interval (WHI)

The WHI (equivalent to wool withholding period) is the time from application of a chemical to when the wool can be harvested (this includes crutching) to satisfy Australian environmental requirements. Most chemicals used to treat external parasites, such as sheep lice and sheep blowflies, bind to the wool grease rather than the fibre itself. The scouring process removes wool grease and most other contaminants at the same time, which can result in contaminated scour effluent and lanolin if the WHI is not adhered to.

You can estimate the pesticide residue levels on wool at shearing caused by lice or flystrike treatments by using the ParaBoss Wool Residue Tool at www.flyboss.com.au/flystrike-tools/woolres-tool

If a lice or fly treatment does not state a WHI or a SRI, then a default one-month period applies for mob treatments or for wound dressings. Flystrike treatments for individual sheep have a default withholding period of at least one month for wool.

Meat withholding period (WHP)

The meat WHP is the time from chemical application to when an animal may be slaughtered for domestic consumption. Although lice control and flystrike products are applied to the skin or wool of the sheep, the skin absorbs some of the product, or in the case of jetting or dipping for lice control, the sheep may ingest or inhale small amounts of the chemical. The specified WHPs are in place to ensure no detectable levels of these chemicals are left in muscle, fat or other body tissues.

The wool withholding period is equivalent to the wool harvest interval (WHI), see above.

Export slaughter interval (ESI)

In addition to the meat WHP, sheep producers need to be aware of the ESI. The ESI is the time from chemical application to when an animal may be slaughtered for export. Some products have a relatively long meat WHP or ESI. Take care when treating lambs to ensure this will not delay their planned sale.

A trade advice statement (such as an ESI) may not appear on labels of older registered veterinary products, however all new products now include a trade advice statement. If you cannot find the ESI on a product label, use the ParaBoss Products Search tool available on FlyBoss or LiceBoss (see 'More information' below).

More information:

Find the SRI, WHI, WHP and ESI for registered parasite treatment products using the ParaBoss Product Search tool, available at: www.paraboss.com.au/tools

APVMA website (Pesticides and veterinary residues): <https://apvma.gov.au/node/10806>

APVMA PubCRIS database search (chemical registration information): <https://portal.apvma.gov.au/pubcris>

Best practice information for applying flystrike chemicals: www.wool.com/demystify



When administering veterinary and agricultural chemicals, always read the label before use and follow the instructions exactly.

Frequently asked questions about residues

What are the main causes of unacceptable chemical residues in wool?

Higher residue levels occur from not following the label directions for application, improper timing of treatments, ignoring withholding periods, or overdosing chemicals.

How can I comply with withholding periods to avoid residue levels?

Always read product labels, follow WHI, WHP, ESI and SRI legal requirements, and use tools like ParaBoss for accurate residue management.

What are the best practices to minimise unacceptable residue levels in wool?

Always adhere to product label instructions, optimise the timing of treatments and keep detailed records of chemical use.

Does the increasing resistance of blowflies to chemical treatments impact residue levels in wool?

No. Although some chemicals might no longer be as effective against blowflies as they once were, the strength of the chemicals remains the same, which means residue levels in wool are not impacted.

Does the level of chemical on shorn wool break down like it does on the sheep?

No, chemicals do not break down in wool bales in the same way as they do on the sheep. A lot of chemicals rely on UV and rain to breakdown.

Can I shear or crutch sheep during the withholding period if flystrike is severe?

Always adhere to product labels and WHIs. You may need to look for another chemical option with a short WHI to address the flystrike risk until the WHI period expires and increase sheep monitoring and treatment.

What should I do if my shearing time falls within chemical withholding periods?

Shearing needs to be delayed to comply with label directions. In the long term, you can adjust chemical application timing or product. Consult your trusted advisor for guidance on compliance with WHI and SRI.

Does overdosing chemicals increase residue levels in wool?

Yes, overdosing leads to higher residue levels. Compliance with the product label is critical.

Best practice product application

To achieve the correct application of chemicals, woolgrowers should read product labels closely (and the material safety data sheet, if necessary) and take care with the preparation and dispensing of the product.

Equipment must be suitable and set up correctly. Ensure correct calibration of the delivery tools and apply the product to well-prepared and contained sheep. Operators must take time and care with every sheep.

To ensure the safety of the operator:

- Follow the safety direction on the label.
- Store chemicals correctly and securely.
- Wear protective gear.
- Carefully pour and mix chemicals.
- Have water, soap and towel ready to wash splashes off.
- Have clean-up equipment ready for spills.
- Wash hands before eating, drinking or smoking.
- Wash and store equipment straight after use.
- Change your clothes when you have finished chemical work.

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GUIDE TO FILLING THE FEED GAP WITH SALTBUSH

A new guide is available to help sheep and wool producers establish and utilise saltbush-based forage systems to fill feed gaps and make unproductive agricultural land more profitable.

Benefits of using saltbush

Used in a grazing system, saltbush can:

- maximise production on land not suitable for cropping or other pasture types
- fill seasonal feed gaps
- lift farm stocking rates
- reduce supplementary feeding
- improve drought resilience
- restore the productivity of saline land and help manage water table recharge
- maintain sheep weights in summer while increasing wool growth
- provide health benefits through provision of vitamin E and minerals
- provide shade and shelter for livestock.



AWI and Meat & Livestock Australia (MLA) have published the guide to help inform sheep and wool producers of the potential benefits of the different types of saltbush in southern Australia and how to get saltbush forage systems working productively and profitably.

Saltbushes are native perennial shrubs that provide palatable year-round feed. They are well adapted to dry conditions and soil types that have low productivity. While they tolerate high levels of salinity, they happily grow without salt.

The release of the guide follows the completion of the four-year 'No more gaps with superior shrub systems' project which was led by CSIRO and co-funded by AWI and MLA.

During the project, the research team delivered project and extension messages at 48 events to 1,040 producers and 1,028 extension agents, scientists and other industry members. The team also produced numerous extension products – and this new guide is the latest.

"The 'how to' guide aims to provide producers with easy access to all the information needed to give them the confidence to adopt saltbush shrub systems on marginal soils," said AWI General Manager, Research, Bridget Peachey.

"The ultimate aim of AWI's investment in the project is for woolgrowers to utilise saltbush shrubs to improve their whole-farm stocking rates and help them manage seasonal risk, especially as climate variability increases."

Why include saltbush as part of a production system?

Nutritional gaps represent the largest production cost to grass-fed sheep and woolgrowers across Mediterranean-type and dry Australian environments.

These gaps can lead to sub-optimal production or slower growth rates, the need for supplementary feeding and overly conservative whole-farm stocking rates.

Perennial forages, including drought-tolerant native shrubs such as saltbush, provide an opportunity to fill the summer/autumn and early winter feed gaps.

Saltbush and other shrubs can:

- be grown on soils considered marginal for crop production and provide nutrients to complement, and thereby improve, the feeding value of crop and pasture residues
- offer an effective tool for managing recharge of water tables and restoring the productivity of saline land
- provide a reliable green feed source in summer and autumn, which is high in crude protein, sulphur, vitamin E and minerals
- improve wool growth through provision of sulphur, amino acids and salt.

"Saltbush helps producers to manage the dry seasons by providing a reliable source of energy, protein and nutrients that may assist sheep to manage oxidative stress during reproduction and heatwaves," said CSIRO agricultural scientist, Dr Hayley Norman, who led the research project.

"It's a bonus that saltbush is tolerant of the sandy, clay and saline soils that are challenging to crop. We are currently working with partners to quantify the capacity of saltbush to be used as an 'edible' shelter to improve survival of twin lambs.

"And for the woolgrowers, we consistently measure a 20-25% increase in wool growth from Merino sheep grazing saltbush systems, compared to peers on dry pastures and stubbles."

Although utilising saltbush can provide productivity benefits, saltbush species are not a suitable feed on their own, due to the high salt, oxalate and sulphur content of their leaves. This means it is important to consider what other feed sources the animals will have to complement the saltbush, whether this comes from understorey plants in the same paddock or other feed sources like hay or grain.

Livestock also need access to a generous supply of fresh drinking water nearby. If water is in the corner of a large paddock, stock may underutilise some shrubs and overgraze others.

Is saltbush suited to your farm?

In mixed farming zones, perennial shrub systems have the best economic fit on land that has lower profitability for cropping. On the flip side, there is little point establishing saltbush in areas where it will not be productive, persistent and provide a return.

To get the most out of saltbush, start with the best 'marginal' land, which offers the easiest establishment and the highest economic return potential. Don't venture into the more challenging areas until you are more experienced in establishing and managing shrubs and have a system that works.

Additionally, it is important to understand the degree of salinity and waterlogging in the paddock where saltbush is being established.

Although these shrubs are incredibly hardy once they have matured, many species can be difficult to establish through direct seeding as seeds are only 1mm in size. Planting nursery-raised seedlings reduces the risk of poor or patchy establishment.

Give the establishment of a shrub system the same attention you give a crop. The paddock will need to be kept out of production for at least six months during shrub seedling establishment and longer if using seed. Take the time to get it right the first time as you don't want it out of production for 18 months while you fix a failure or a patchy strike rate.



Marc and Stacey Brooke of Tulla Natives at a Select Carbon demonstration day in August planting Anameka™ saltbush with woolgrower **David Nevinson** at Boooroban in the Riverina of NSW.

Where do I to buy Anameka™

There are several species of saltbush being used by producers in Australia as a forage shrubs for their sheep. Anameka™ is a popular cultivar of old man saltbush that has higher energy content, greater biomass production

and palatability for livestock, when compared to native populations.

Anameka™ is currently only available through nursery-raised seedlings. Chatfields Tree Nursery at Tammin in the wheatbelt of Western Australia supplies Anameka™ to Western Australian customers. The best time for ordering Anameka™ from Chatfields is before October the year prior to planting as the seedlings need time to develop a robust root system. Orders are despatched from June to September. Anameka™, like all nursery raised shrubs and trees, should be planted as soon as possible after receiving them. Chatfields also sells other varieties of saltbush, forage shrubs and trees.

Tulla Natives at Wakool in the Riverina of NSW grows Anameka™ under Chatfields National Licence and supplies customers in the eastern states of Australia. Tulla Natives started taking orders for Anameka™ in spring and could sell out due to increasing demand, so orders are a must to ensure supply for 2025 Anameka™. Orders are despatched from May through to the end of August.

More information:

www.wool.com/shrubs

www.chatfields.com.au

www.tullanatives.com.au



Saltbush can provide ideal supplementary feed during the summer/autumn feed gap and dry conditions.

'How to' guide to saltbush shrub systems

Titled 'Optimising establishment and utilisation of saltbush-based forage systems', the 30-page guide covers the following topics:

- What is saltbush?
- Why should you grow saltbush in your production system?
- Understanding how saltbush can benefit your production system
- Is saltbush suited to your farm?
- Designing a saltbush area for your production system
- The importance of good understorey choices
- How to ensure successful establishment
- Additional considerations when direct seeding
- How to optimise grazing
- What are the animal nutrition considerations?



Optimising establishment and utilisation of saltbush-based forage systems

Dr Hayley Norman, Matt Wilmot (CSIRO), Dr Ed Barrett-Lennard (Department of Primary Industries and Regional Development), and Dustin and Lisa McCreery (Chatfields Tree Nursery)



The publication was authored by Dr Hayley Norman and Matt Wilmot of CSIRO, Dr Ed Barrett-Lennard of the WA Department of Primary Industries and Regional Development, and Dustin and Lisa McCreery of Chatfields Tree Nursery.

The guide is available to download at www.wool.com/shrubsguide

WOOLMARK+ INSETTING PROGRAM GETS \$4M GRANT

PHOTO: Mark Piovesan

AWI has welcomed a \$4 million grant from the Australian Government to kickstart the company's ground-breaking Australian Wool Industry Insetting Program. The program will connect brands and Australian woolgrowers looking to reduce greenhouse gas (GHG) emissions through nature-based solutions.



Brands support and invest in emissions reductions and removals activities on farm.

Woolgrowers undertake emissions reductions and removals activities on farm, which the brands report within their scope 3 reporting.



"Brands are increasingly seeking ways to address their Scope 3 emissions, but scaling these efforts has been a challenge. Insetting presents an exciting opportunity for brands to meet their emissions targets while simultaneously supporting Australian woolgrowers. We're grateful to the Australian Government for their support of this game-changing initiative."

The program aims to break down significant barriers woolgrowers face when reducing GHG emissions, including the lack of guidance on best practices, upfront capital, and market engagement. By

The Australian Wool Industry Insetting Program is a new program that is part of AWI's recently unveiled Woolmark+ roadmap to a nature positive future (www.wool.com/woolmarkplus). The Woolmark+ roadmap aims to support woolgrowers and their customers to future proof wool in response to the increasing consumer and regulatory demands for low-impact products within the fashion and textile industries and along their supply chains.

Insetting provides opportunity to reduce GHG emissions in the wool supply chain at scale.

In contrast to carbon *offsetting*, which involves companies balancing out their GHG emissions by investing in projects that reduce GHG emissions in other industries, carbon *insetting* focuses on reducing GHG emissions within the company's own supply chain.

The new Australian Wool Industry Insetting Program will develop and trial an insetting framework aimed at keeping GHG emissions reductions within the wool textile supply chain. This industry-first initiative aims to create the foundation of an Australia-wide

wool insetting market, connecting Australian woolgrowers with global fashion and textile brands that are looking to meet their Scope 3 emissions targets, to jointly deliver on-farm emissions reductions and removals projects.

The program is supported by a strategic partnership between AWI, specialist climate change investment and advisory firm Pollination Group and not-for-profit environmental organisation Landcare Australia. It will establish a comprehensive accounting protocol, methodologies, and case studies to enable woolgrowers to implement on-farm nature-based solutions that reduce GHG emissions.

AWI CEO John Roberts says a key element of the new program is to facilitate investment from global fashion and textile brands into GHG emission reductions on Australian wool-growing properties.

"We want to offer woolgrowers an option and brands a solution that allows emissions reductions to remain within the wool textile supply chain," John said.

addressing these challenges, this initiative will pave the way for impactful emissions reductions across the wool value chain.

As part of the program, AWI is inviting Australian woolgrowers and global fashion and textile brands to collaborate in achieving industry-wide GHG reductions.

Interested woolgrowers and brands are invited to contact AWI at woolmarkplus@wool.com to get involved or for more information.



Australian Government
Department of Agriculture,
Fisheries and Forestry

The Australian Wool Industry Insetting Program is supported by the Australian Government through funding from the Climate-Smart Agriculture Program under the Natural Heritage Trust.

UPTAKE IN AUSTRALIAN WOOL TRACEABILITY HUB

Adoption of the Australian Wool Traceability Hub continues to increase, with more than 40% of wool brokers signing up to the secure platform designed to enhance the traceability of Australian wool from farm to first stage processor.

The Australian Wool Traceability Hub (AWTH) is gaining significant traction, with recent information sessions in Melbourne and Sydney helping to drive engagement with the industry's wool brokers. As at 1 November 2024, more than 40% of wool brokers have subscribed to the platform.

An industry-owned and -led initiative, the AWTH is an essential tool for the Australian wool industry to get ahead of the curve when it comes to Australian wool's Emergency Animal Disease (EAD) response plan. The AWTH also provides a digital platform to track the journey of wool from farm to first stage processor, ensuring a chain of custody and provenance. The AWTH was officially launched in July and is available to woolgrowers as well as wool sellers and buyers.

The AWTH represents a significant industry collaboration, bringing together industry bodies including the Australian Council of Wool Exporters and Processors (ACWEP), Australian Wool Exchange (AWEX), Australian Wool Handlers (AWH), Australian Wool Innovation (AWI), Australian Wool Testing Authority (AWTA), National Council of Wool Brokers of Australia (NCWBA) and WoolProducers Australia (WPA).

"Through the AWTH, we are reinforcing the industry's dedication to transparency and responsible practices," said AWI CEO, John Roberts. "The Hub will serve as a testament to our collective efforts to maintain the integrity, trust and value that Australian wool is known for worldwide."

The nation's wool testing authority AWTA manages and operates the AWTH on behalf of the industry, overseen by Wool Industries Australia Inc.

Property Identification Code

The woolgrower's Property Identification Code (PIC) is an essential requirement of the AWTH. A PIC is an eight-character alphanumeric code allocated by state/territory authorities to livestock producing properties. If you own sheep, you require a PIC.

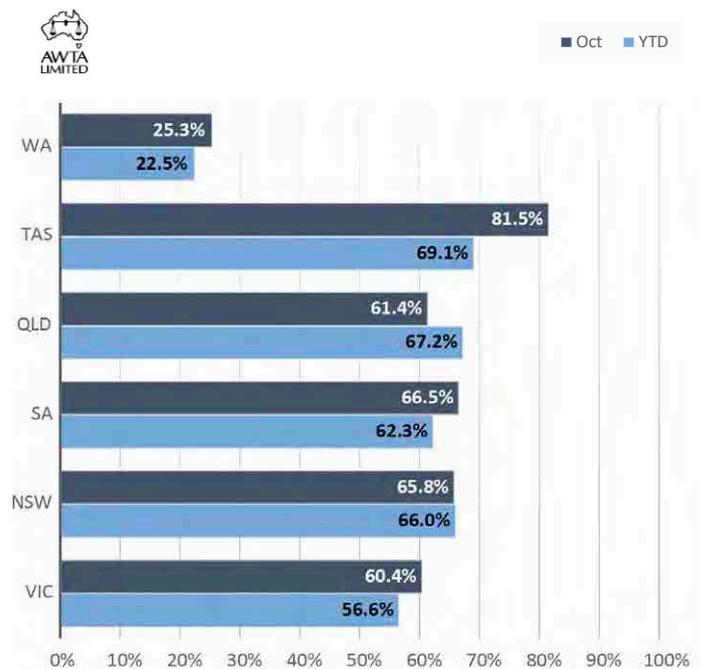
Ensuring accurate PIC declarations is crucial for mapping bales back to properties. It improves the industry's ability to respond rapidly and effectively should an EAD outbreak happen. Accurate PIC data allows authorities to trace the origins of potential disease threats swiftly, helping to protect the health of livestock and maintain biosecurity. Importantly, it would help re-establish trade in the shortest possible timeframe.

PIC declarations continue to improve. Nationally, PIC declarations have increased by 14.1 percentage points during the past year, up from 41.5% during October 2023 to 55.66% during October 2024. However, this figure is still much lower than what is required to adequately deal with an EAD event.

All woolgrowers are strongly encouraged to make sure they include their PIC on their Wool Classer's Specification and National Wool Declaration. Moving forward, the goal is to achieve a 100% adoption rate which would enable a rapid response to help minimise the inevitable trade disruptions that would follow in the event of an EAD incursion. You can update your contact details or apply for a PIC by contacting your state authority or Department of Agriculture.

Tasmania currently leads the way with 81.5% PIC declarations achieved in October 2024, setting a benchmark for others to follow (see Figure 1 above).

Figure 1: Percentage of bales with a PIC in October 2024 and year to date



Farm data privacy

In a major development, the AWTH will soon achieve independent certification under the National Farmers' Federation (NFF) Farm Data Code, reflecting the AWTH's commitment to responsible data management and security.

This certification provides reassurance to both woolgrowers and brokers regarding the safe and ethical use of their data. Visit www.nff.org.au/australian-farm-data-code for more information about the NFF Farm Data Code.

Access to your clip test information

A further benefit of the platform is that woolgrowers can access all their wool test information in one convenient location, while also gaining valuable insights into the journey of their wool through the supply chain.

A key step to utilising AWTH's capacity to showcase clip test information is the link to WoolClip, the industry's electronic wool speci. This integration enhances the flow of information through the wool supply chain, making it easier to track wool from farm to export.

More information: www.awth.com.au

STUDENTS LEARN ABOUT SHEEP MANAGEMENT

Students from schools in every state of Australia this year gained practical hands-on sheep management experience by looking after teams of Merino wethers as part of state-based School Merino Wether Challenges.

Merino wether competitions were held this year in all six states across the country with their aim to educate high school students about the commercial production of Merino sheep. The initiatives provide the students with a memorable 'hands on' experience covering a broad range of sheep and wool production skills.

Each school team looked after several wethers (from studs in their state) for about six months, with the students forming a close relationship with their wethers. This provides a unique and practical experience for the students, much different from classroom learning. Each school team then showed their wethers during a competition later in the year and were judged according to their meat and wool quality.

By attending training and the judging events, and by looking after their wethers, the students gain:

- practical, hands-on skills in sheep management
- a better understanding of sheep and wool production as a business
- contact with many aspects of the Merino sheep industry
- a chance to network with industry participants and other students
- an enjoyable experience with Merino sheep and the industry
- a positive perspective on a career with sheep and wool.

The Merino wether competitions were initiated 14 years ago in South Australia by the SA Stud Merino Sheepbreeders Association (Merino SA), with similar competitions having since been introduced in New South Wales and Western Australia. Following the success of these three initiatives, students in Tasmania and Queensland last year held their first state competitions and, for the first time, students in Victoria were this year given the chance to take part in their own state competition.

All the competitions are supported by AWI, as well as individual studs, schools, teachers and students.

NEW SOUTH WALES



The winning team from St Matthews Catholic School Mudgee.

In NSW, 69 schools from across the state participated in the **School Merino Wether Challenge**, which was organised in partnership with the NSW Stud Merino Breeders Association, the Dubbo National Ram Sale Association and Bralca. There were more about 700 students from right across NSW and more than 400 wethers involved in the program this year. The challenge involved each school being allocated six wethers from the same age drop from Egelabra Merino Stud.

Training days were held throughout the course of the six-month challenge to provide ongoing assistance to school staff and students in caring for their team of wethers, as well as helping to develop industry skills and knowledge. With a new addition in 2024 of a tour of the Charles Sturt University Global Digital Farm, students were able to explore a range of advanced opportunities in the sheep and wool industry.

At the end of the six months, in August, students converged on the Dubbo Showground where they presented their wethers for judging on commercial value. St Matthews Catholic School Mudgee won the overall prize, followed by last year's winner Deniliquin High School in second place and Scots All Saints College. Boggabilla Central School and Condobolin High School received encouragement awards.

At the event, students also had the opportunity to participate in activities to learn more about sheep handling and working dogs, wool harvesting, fleece typing with AWN, Fletchers International Exports, take part in a young farmers challenge with Bralca, and hear from a careers panel about the wide range of opportunities in the industry. A young judges' workshop also enabled students to learn the skills necessary to compete in competitions at ag shows across the country.

WESTERN AUSTRALIA



Western Australian College of Agriculture Harvey was the overall winner.

Now in its ninth year in WA, teams from five schools and colleges took part in the **AWI Future Sheep Breeders Challenge** that was organised in partnership with the Stud Merino Breeders' Association of WA (Merino WA). The judging took place at the end of September at the Perth Royal Show, with support from the Royal Agricultural Society of Western Australia. Teams looked after six wethers but showed four at judging. The winning team was WA Agricultural College of Agriculture Harvey, followed by Kelmscott Senior High School in second and WA Agricultural College of Agriculture Denmark in third.

SOUTH AUSTRALIA



The winning team from Karcultaby Area School.

There was a large turnout of the next generation of woolgrowers – about 400 students from 42 schools – who participated in the 15th annual **School Merino Wethers Competition** organised by the SA Stud Merino Sheepbreeders Association (Merino SA) and held in September. 72 teams of three wethers were brought into the Stud Sheep Pavilion at the Adelaide Showgrounds during the Royal Adelaide Show. It was a hugely successful event with all the students providing a fantastic display of professionalism and dedication to the industry. As well as providing the students with a hands-on experience of commercial sheep and wool production, the competition enabled the students to have contact with many aspects of the Merino sheep industry from stud and commercial breeders, stock agents, wool buyers, through to processors. Karcultaby Area School was awarded the School Merino Wethers competition supreme ribbon.

VICTORIA



The winning Greater Shepparton Secondary School team.

The inaugural **School Merino Wether Challenge** in Victoria was established by AWI this year in partnership with the Australian Sheep Breeders Association. The Challenge kicked off in March and the response and engagement from schools across Victoria was overwhelming. There were 11 schools from across the state involving about 120 students that participated during the six months. All the sheep in the Challenge came from the Kerrilyn Merino Stud at Dunluce, west of Bendigo. A total of 66 sheep – six from each school – were on show during the competition held at Clunes Showground at the end of August. Greater Shepparton Secondary School won the Challenge, with Ballarat Grammar second and Goroke P-12 College third.

QUEENSLAND



The winners from Dalby State High School.

The **School Merino Wether Challenge** in Queensland, this year being held for the second time, saw an increase in school participation with eight schools presenting ten teams of wethers, up from five schools presenting six teams last year. This year's program was organised by the Queensland Primary Industries. During the program, AWI provided valuable resource material for the teachers to implement in their ag programs. Each school team was provided with five wethers from Will Roberts' Victoria Downs Merino Stud at Morven and the team picked three of the best wethers to show at the program's concluding competition held at the Royal Queensland Show (Ekka) in August. Peter Sealey and Cecelia Cummack, both from Elders, judged the best pen of three wethers. The competition was won by Dalby State High School with St George State High School second and Oakey State High School third. All participating schools thoroughly enjoyed the program and are keen to be back next year.

TASMANIA



Exeter High School teams came first and second in the competition.

2024 marked the second year of the **Tasmanian School Merino Wether Challenge**, coordinated by AWI in partnership with the Stud Merino Breeders Association Tasmania. Twelve high schools received a donation of six Merino wethers from ten woolgrowers from across the state. The 72 sheep were on display at the Campbell Town Showgrounds with 130 students and 50 teachers and volunteers in attendance. The program this year also included a careers expo with seven industry representatives interacting with the students throughout the day to demonstrate the varied career options available in the sheep and wool industry. Teams from Exeter High School won the challenge and placed second with Sheffield High School placing third.

JUDGING CHAMPIONSHIPS FOSTER YOUNG TALENT

AWI supports the National Merino Fleece and Merino Sheep Young Judges Championships to help bring through the next generation of young judges and Merino breeders.

Continuing its backing of previous years, AWI was once again the national supporter of both the National Merino Fleece Young Judges Championship and the National Merino Sheep Young Judges Championship, run by Agricultural Shows of Australia and held this year at the Melbourne Royal Show in October.

"AWI sponsors the events to support young people within the industry to further their skills through visual selection and appraisal of wool and sheep. By providing the opportunity to broaden their experiences and knowledge base through competition, the finalists become ambassadors for the wool industry," AWI National Extension Manager Emily King said.

The Young Judges Championships are for people aged between 15 and 25 and help to train the next generation of young judges and livestock breeders. To participate in the National Championships, the competitors must first have won their own state finals.

Participants demonstrate their skills in communication, public speaking and breed and industry specific knowledge. They also get a chance to strengthen career opportunities through networking with colleagues and key industry stakeholders.

Chairman of Agricultural Shows Australia, Dr Rob Wilson, praised the work of the young judges and their valuable contribution to the agricultural sector. "The young judges play an important role in the future of Australian agriculture by identifying the best traits that will contribute to breeding the next generation of quality livestock," he explained.

Merino Fleece Championship



*Merino Fleece Young Judge competition winner **Brendan Lamont** from Western Australia (centre) with the other award finalists.*

The National Merino Fleece Young Judges Championship was won by Brendan Lamont (23) from Tambellup in Western Australia, ahead of Grace Hillier (23) from St George in Queensland in second place, with Cally Spangler (23) of Launceston in Tasmania in third.

The other finalists were Alison West (24) from Kapunda in South Australia, Tiffany Maestrale (16) from Somerville in Victoria and Zara Kesby (15) from Bingara in NSW.

Competitors were required to judge two classes of four fleeces each (eight in total) and then explain their placing of one of the classes.

Growing up on a family farm with a fine wool Merino flock and now running his own Ile de France stud, Brendan brings first-hand experience to the competition. "I was looking for sound fleece with high commercial value, and it was a strong, viable round overall. Credit must go to all the competitors who made the competition worthwhile," Brendan said.

For young people interested in judging, Brendan emphasised, "Listen to your teachers, and get involved in industry programs. It's good to be on-farm and learn on the job, but it's equally important to gain knowledge and experience across all aspects of the supply chain."

Merino Sheep Championship



*Merino Sheep Young Judge competition winner **Bateson Pittman** with third placegetter **Kasey Shields** (left) and runner-up **Ashley Meaburn** (right).*

Bateson Pittman (17) from Walcha in NSW won the National Merino Sheep Young Judges Championship ahead of runner-up Ashley Meaburn (23) from Oatlands in Tasmania, and Kasey Shields (22) from Noorat in Victoria in third place.

The other finalists were Flynn Bolt (16) from Corrigin in Western Australia, Beau Maddern (17) from Cummins in South Australia and Grace Hillier (23) from St George in Queensland.

Competitors were required to judge four rams and four ewes. They then had to explain their placing of either the rams or ewes.

Bateson is the sixth generation on his family's superfine Merino stud. He has been a competitive young judge for five years and greatly enjoyed taking part on the National Championships.

"It's a respected competition and highly recognised within the industry. I really enjoy the sheep judging and show circuit, winning the competition certainly gives you a leg up for future judging opportunities," Bateson said.

Bateson encourages anyone with a general interest in agriculture to follow their passions. "Go for it, make yourself known, be part of the industry, enter competitions, learn and develop your skills. There's so many different paths to take, no matter your background or interests."

More information: www.agshowsaustralia.org.au

EDUCATING WOOL'S NEXT GENERATION

AWI is involved in a range of initiatives to encourage the younger generation into the wool industry. Reported here is a snapshot of some of the AWI-supported initiatives undertaken in the past few months.



AWI Young Sheep Producers Challenge, WA

This AWI initiative involved students from WA agricultural colleges competing at the Perth Royal Show in September. Teams of six students from each college competed, with two of each team's students assessed on shearing, two assessed on woolhandling, and two assessed on ewe selection. The overall winner was the team from the WA College of Agriculture Cunderdin, followed by WA College of Agriculture Harvey and WA College of Agriculture Narrogin.



LEADAg Youth program, Queensland

In Queensland, AWI supported the LEADAg Youth program, developed and delivered by CHRRUP. Amongst other activities, the twelve 15-17 year olds in the two-week program experienced the steps involved in wool harvesting, wool classing and sheep handling thanks to trainers from AWI and property hosts Suz and Grant Laidler of 'Kappa Ki' at Longreach and David Counsell of 'Dunblane' at Barcardine.



Jamestown Junior Livestock Education Day, SA

The Education Day hosted by the Jamestown Agricultural, Horticultural and Floricultural Society brought nearly 200 students from across South Australia to the Jamestown Showgrounds to gain hands-on learning about sheep and cattle production. AWI's involvement in the event provided students with an insight into wool production and harvesting, and hopefully will encourage some into a career in the industry.



Murdoch University students farm tour, WA

Second and third year students from Murdoch University in Perth were out and about in the Great Southern region of WA. They visited studs and commercial woolgrowers to hear about their wool production systems, and learn how each is run according to management principles specific to the property.



RAMping Up Repro workshop, NSW

Ten agriculture students from Crookwell High School joined sheep and wool producers from the local region at a RAMping up Repro workshop held at Laggan on the Southern Tablelands of NSW in September. They experienced plenty of hands-on participation and learning during the workshop that was run by AWI Extension NSW. See page 15 for information about RAMping Up Repro workshops.



Novice wool harvesting course, WA

Keen students learning about wool harvesting on an AWI-funded week-long course in November at Rylington Park, Boyup Brook, in south-west WA. AWI funds these practical courses in all states to attract and retain new entrants into the wool harvesting industry and create a pathway for them to obtain ongoing employment. See page 7 for further details about the wool harvesting courses.

AWI GRADUATE TRAINING PROGRAM 2025 UPDATE

PHOTO: skodonnell

Taite O'Neill from WA has been selected to join the AWI Graduate Training Program, through which she will gain a thorough understanding of the wool supply chain from fibre to fashion.



Taite O'Neill from Ongerup, Western Australia.

The AWI Graduate Training Program will enable Taite to gain experience in all areas of the AWI business including on-farm and off-farm R&D through to marketing, including global exposure to the wool supply chain through international rotations to pivotal markets in Asia and Europe.

"The prospect of exploring all aspects of the Australian wool industry and expanding my

knowledge is incredibly exciting. I am looking forward to learning as much about our supply chain as possible and fulfilling my desire to contribute to AWI's vision," Taite said.

Taite's wool journey began at home on the family farm at Ongerup in Western Australia's Great Southern region. It was here that her deep-rooted connection to the wool industry inspired her to study a Bachelor of Agricultural

Science at Murdoch University. It didn't take long for Taite's passion to strengthen and grow and spark a keen interest in learning more about wool beyond the farm gate.

Taite will make the move to Sydney in early March to start the 18-month program.

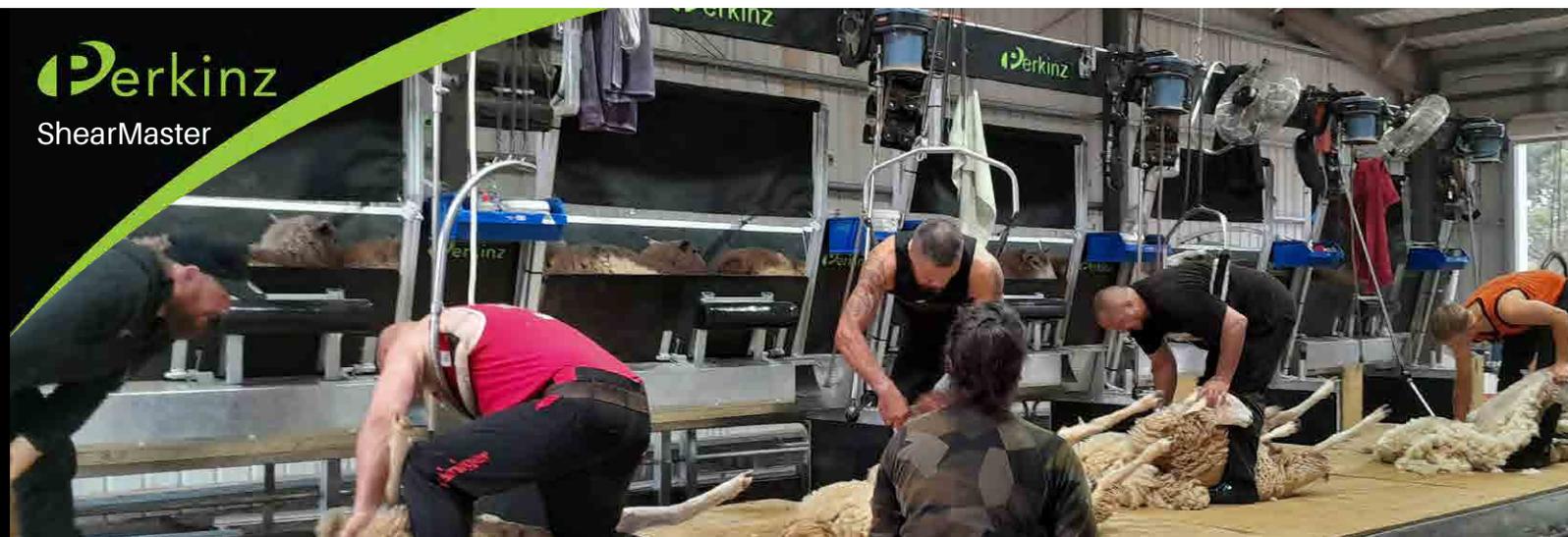
"AWI saw a 22% increase in applications this year, a clear indication of the passionate and enthusiastic young talent we have within the wool industry. We look forward to having Taite on board," said AWI CEO John Roberts.

2024 AWI graduate Oskar Mitchell from Cowra in NSW is half-way through his program and is currently working in AWI's research team.

Both of AWI's 2023 graduates, Kate Rice and Harrison Dunning, have made significant contributions to many of AWI's projects and initiatives during the past 18 months and they will continue to do so within their new roles. Kate has moved into the role of Stakeholder Communications Coordinator, supporting both AWI's General Manager of Consultation & Engagement, and the Marketing Content Manager. Harrison has joined AWI's Global Sustainability Team, supporting AWI's Global Sustainability Manager in the delivery of Woolmark+ and AWI's broader sustainability initiatives.

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Perkinz

In September, Woolmark launched a powerful new chapter of its eco marketing campaign, pictured here on a video billboard in Times Square, New York. See pages 36-38.



Australian Wool Innovation Limited

AWI WORKING TO INCREASE THE DEMAND FOR AUSTRALIAN WOOL

'WEAR WOOL, NOT WASTE' MARKETING CAMPAIGN

In September, Woolmark launched a powerful second chapter of its eco marketing campaign, highlighting to consumers that clothes made from synthetic fibres remain in the environment, damaging the planet, long after they have been discarded. The campaign urges consumers to consider the fibre composition of a clothing product – and choose wool – when they are thinking of making a purchase.

INTERIM CAMPAIGN RESULTS

(up to 14 November)

64.8 million
video views

241 million
impressions

865
media clippings

1.3 billion
media reach

Awarded
advert of the day in *The Drum* and *Campaign UK*
and features in *Famous Campaigns* and *Adweek*

Building on the momentum and success of its 'Wear Wool, Not Fossil Fuel' marketing campaign which raised awareness of fossil fuel as the source of synthetic fibres, Woolmark has unveiled a new instalment in the campaign, titled 'Wear Wool, Not Waste', which highlights that synthetic apparel do not readily decompose and remain polluting the environment for centuries.

Importantly, the campaign also highlights that wool has unparalleled advantages due to it being natural, renewable, biodegradable and the most recycled apparel fibre – and therefore a solution to reducing the fashion industry's impact on the planet.

"Every synthetic garment ever made still exists in some form, haunting our planet."

Key campaign message

The first synthetic clothing made from fossil fuel was introduced about 100 years ago. Their use has steadily increased to the extent that synthetic fibres, especially polyester, are now the dominant fibre used in clothing and they continue to have a high market growth rate.

However, synthetic fibres do not readily biodegrade. This means that the average polyester product is likely to survive in landfills for more than 200 years, leaching chemicals, shedding microfibres on our land and in our oceans, and releasing methane as it rots.

It is predicted that in just ten years' time, unless there is a shift in apparel manufacturing and consumption, 73% of the entire clothing market will be made from synthetic fibres, which will remain polluting the environment for generations to come.

"Wool is natural, renewable, biodegradable, and the most recycled apparel fibre."

Key campaign message

In contrast, wool is made of a natural, biodegradable protein. When a wool product reaches its end-of-life and is disposed of, the wool fibre readily decomposes in soil, slowly releasing valuable nutrients and carbon back into the earth, acting like a fertiliser.

Wool therefore fits very well into a sustainable 'circular' model of textile production that *minimises* waste and pollution, while synthetic fibres are more aligned with an unsustainable 'linear' model of textile production associated *with* waste and pollution.

AWI CEO John Roberts says Woolmark's eco marketing campaign aims to raise awareness of the detrimental impact of synthetics on the environment and urges consumers to actively consider fabric impact when purchasing clothes and seek out natural fibres, such as wool.

"The 'Wear Wool, Not Waste' instalment of the campaign highlights that when a synthetic garment is 'thrown away', it never actually goes 'away'. It remains in the environment for centuries in some form," John said.

"Synthetic clothes will outlive our grandchildren which is why the fashion industry must prioritise natural, biodegradable fibres. The campaign is an urgent call to consumers and the fashion industry at large to re-evaluate fibre choices.

"Ultimately it aims to encourage people to wear wool an alternative to synthetic clothing."

More information: www.woolmark.com/wear-wool



Screenshot from the campaign film showing the planet increasingly overrun with discarded synthetic clothing.

Campaign reveals the 'zombie invasion' of discarded synthetics

The new campaign centres around a 60-second hero film showing people in a city rushing to escape a massive 'zombie invasion' of old synthetic clothes, representing synthetic apparel that has been discarded over time but still haunts the planet to this day.



At the end of the video, and in contrast to the 'zombie invasion', is a lady alongside sheep in a peaceful, green and pastoral setting, emphasising the natural attributes of the wool clothing she is wearing.

The film ends with the 'Wear Wool, Not Waste' call to action highlighted on screen.



Screenshots from the campaign film. The immense and overwhelming accumulation of discarded synthetic clothing on the planet (left) contrasts with wool which is presented as a natural solution to fashion's environment issues (right).

Roll out of the new campaign in key consumer markets

The campaign has been rolled out across the US, UK, France and Australia focused on high attention video environments to distribute the hero film, including cinema, YouTube and Connected TV i.e. delivered to a smart TV via a streaming service.

The roll out of the campaign also includes highly targeted street-level advertising in high foot traffic, retail locations in New York, London and

Paris, plus during the screening on TV of the AFL and NRL grand finals in Australia, and local activations across the world.

An army of influencers has also been engaged to help amplify the campaign, targeting Gen Z and Millennial audiences to drive deeper engagement.



Examples of campaign advertising: on the London Underground, at Times Square in New York, Midtown Manhattan in New York and the Beaugrenelle shopping centre in Paris.

Continued overleaf



← Continued from previous page

Woolmark’s broader eco marketing campaign

Wear Wool, Not Fossil Fuel

The first chapter in Woolmark’s eco marketing campaign, Wear Wool, Not Fossil Fuel, educated consumers that synthetic fibres are made from oil, whereas wool is a natural, renewable, biodegradable and the most recycled apparel fibre. The campaign had an amazing reception with strong and positive results. It achieved more than 130 million views since it was released in September 2022 and surveyed consumers said it was very impactful:

- 75% expressed purchase intent for wool.
- 78% have reconsidered the environmental impact of their clothing choices.
- 80% acknowledged wool as environmentally friendly.
- 77% take fabric/materials into account when making clothing purchases.

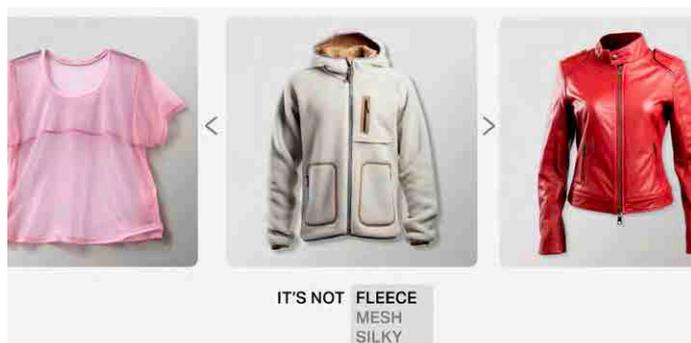


The Wear Wool, Not Fossil Fuel campaign reinforced to consumers that synthetic fibres are made from oil.

Filter by Fabric

Woolmark also continues to amplify its Filter by Fabric initiative, which aims to help shoppers easily identify authentic wool products. The initiative calls on industry to stop using misleading language on product names, instead adopting accurate fabric composition descriptions in product names and introducing fabric filters on e-commerce sites to help shoppers make more informed choices.

The Filter by Fabric initiative was launched last year and has garnered thousands of pledges, including from notable brands such as global fashion giant Benetton, Reformation, Cubus and Maggie Marilyn; leading Australian brands Iris & Wool, Merino Country and Albus Lumen; as well as industry bodies including IWTO, Copenhagen Fashion Week and No More Plastic. To sign the pledge, visit www.filterbyfabric.com



The Filter by Fabric initiative aims to help shoppers to easily identify what fibre the product is actually made from.

Woolmark+ roadmap

The eco-marketing campaign aligns with AWI’s broader mission to position wool as a key solution to the fashion industry’s sustainability challenges – a vision encapsulated in the recently launched Woolmark+ roadmap, a program aimed at driving the wool industry towards a nature-positive future.



Woolmark+ is designed to help woolgrowers and supply chain partners accelerate the wool industry’s transition towards a nature positive future.

“Woolmark’s eco marketing campaign aims to help reverse the rise of fast fashion, which is dominated by synthetic fibres such as polyester, and increase demand for clothing made from wool which is a premium natural fibre.”

John Roberts, AWI CEO

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 natural, biodegradable protein. When a wool product reaches its end-of-life and is disposed of, the wool fibre readily decomposes in soil, slowly releasing valuable nutrients and carbon back into the earth, acting like a fertiliser. In contrast, synthetic fibres do not biodegrade but instead accumulate in landfill and release microplastics in our oceans or on our land.

WOOLERINA BLANKET: WASTE NOT, WANT NOT

PHOTOS: Monique Lovick Photography

Two iconic Australian wool brands, Woolerina and Waverley Mills, have teamed up to launch a blanket woven from a yarn made with recycled offcuts from Woolerina's wool apparel business blended with virgin Australian wool.

Specialising in Merino wool clothing for men, women, kids and babies, Woolerina is an Australian family owned and run business, headed by former wool buyer and broker Warwick Rolfe who founded the company nearly 20 years ago.

All Woolerina garments are knitted, dyed and constructed in Australia, with the design, pattern making, cutting and some garment construction, along with warehousing and despatch, carried out at the company's base at Forbes in the Central West of NSW.

The company's product range has grown from just four styles back in 2006 to now comprise a large range including base-layer tops, cardigans, jumpers, dresses, skirts, pants, sleepwear, socks and accessories.

The latest addition to Woolerina's catalogue, the Woolerina x Waverley Mills Blanket, is a product about which Woolerina is particularly proud, because it includes recycled fibre made from the company's waste off-cuts.

Re-purposing offcuts minimises waste

Warwick says that when Woolerina first began cutting its garments in-house back in 2015, he became acutely aware of the large amount of waste offcuts created during the garment production process, up to 25% of the original fabric.

"It was such a waste of beautiful fabric – made from premium wool – which I didn't want to see end up in landfill. Over the past 10 years we have carefully collected all the offcuts from our cutting room, while we worked on finding a way for this waste to be used," Warwick said.

"There have been many ideas and many 'roadblocks', but it became apparent that the best way to finding a new use for the offcuts was to begin by shredding the fabric, to 'strip it back', returning it to a similar consistency of raw wool and then blending it with virgin wool.

"We were excited to learn of Waverley Mills' ability to create the yarn we were seeking on a commercial scale, and then a blanket from this yarn."

Woolerina's business model shows how, in contrast to synthetic fibres, wool fits into a sustainable, circular model of textile production that minimises waste and pollution. Not only



Woolerina's Warwick Rolfe and his two daughters, Pippa and Penny, and grandchildren with the blanket.

"Fabric re-purposing has been in my thoughts for many years and this project is the culmination of nearly 10 years' work. We are thrilled to be able to finally bring these premium wool offcuts to life through this partnership with Waverley Mills

Warwick Rolfe, Woolerina

does Woolerina use predominantly Merino wool – a renewable and biodegradable fibre – but its recycling of offcuts is an example of how wool is the most recycled fibre on the planet of the major fibre types.

Woolerina x Waverley Mills Blanket

Warwick worked closely with Waverley Mills, Australia's oldest continuously operating textile mill, to develop the yarn and the Woolerina x Waverley Mills Blanket. The Woolerina offcuts were shredded and then blended with virgin wool in a ratio of 30% offcuts to 70% pure new wool fibre to create a new 100% wool yarn, with which Waverley Mills wove the blanket.

Founded in 1874, Waverley Mills is committed to manufacturing products made from natural fibres and has its eyes firmly fixed on the future, with Australian Merino wool being the hero (see the article in the September 2024 edition of *Beyond the Bale*). The company has recently been working collaboratively with brands such as Woolerina.

"The Woolerina job was, in so many ways, a great experience for Waverley to be involved with. It has been one of my favourite projects to work on to date," said Penny Rundle of Waverley Mills.

Woolerina launched the Woolerina x Waverley Mills Blanket in October and it is available to purchase from the Woolerina website. Woolerina ships across Australia and internationally.

More information: www.woolerina.com.au

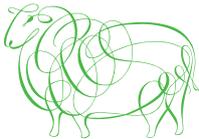


Woolerina offcuts about to be recycled into yarn at Waverley Mills. PHOTO: Waverley Mills

CAMPAIGN FOR WOOL PROMOTION IN THE UK

PHOTO: Rikesh Chauhan RKZ

The Campaign for Wool's annual Wool Month in the UK returned this year during October to promote the natural and sustainable benefits of the fibre and to encourage consumers to 'Check It's Wool' when they are purchasing products.



THE CAMPAIGN FOR WOOL

Patron: HM King Charles III

Launched in 2010 The Campaign for Wool continues to raise awareness amongst consumers about the unique, natural, renewable and biodegradable benefits offered by the fibre.

In May this year, the Campaign was honoured to announce that HM King Charles III has agreed to remain as its patron. The Campaign for Wool was HM The King's personal initiative in 2008 when he was The Prince of Wales.

With support from Woolmark and other Commonwealth wool bodies, the Campaign has been instrumental in helping educate consumers about the versatility of wool, and reconnecting them with its myriad uses – from luxurious, fine Merino wool apparel through to beautiful, hardwearing interior products for the home.

Wool Month in the UK

Wool Month in the UK was this year launched at an event in London hosted by Sir Nicholas Coleridge, Chairman of the Campaign for Wool. The event's gallery space was designed as an educational walk-through highlighting wool from different breeds of sheep, from superfine Merino wool to the broader microns, and the wide variety of wool fabrics and commercial products made from each wool type.

Throughout Wool Month, there was a series of UK-wide activities, in-store retailer events, panel discussions and product launches from brands. There are more than a thousand supporters involved in the Campaign for Wool. UK brands that launched new designs to celebrate Wool Month this year included Aubin, Brora, Johnstons of Elgin, Jaeger, John Smedley, Smalls Merino, M&S and more.

For this year's Wool Month, the call to action was to 'Check It's Wool', encouraging shoppers to make positive, conscious natural fibre choices when choosing the products they want.

Towards the end of Wool Month, a trade event hosted by Peter Ackroyd MBE, COO Campaign



Campaign for Wool patron King Charles III with Queen Camilla in Sydney during their visit to Australia in October. PHOTO: Brook Mitchell

for Wool, was held in Bradford, Yorkshire, which was attended by representatives from many of the region's mills and other stakeholders. At the event, Woolmark gave a presentation, including a showing of the 'Wear Wool, Not Waste' video (see page 36), which was widely appreciated by the audience.

Earlier that day, International Wool Textile Organisation (IWTO) President Klaus Steger addressed a meeting of local wool processors about the Product Environmental Footprint (PEF) project in the European Union and the importance of the Make the Label Count campaign. UK mills have raised €150,000 to help fund the campaign.

Other highlight initiatives of Wool Month

'Making It' project with Vitale Barberis Canonico

Campaign for Wool collaborated with 360-year-old, family-owned, Italian mill Vitale Barberis Canonico in a project titled 'Making It', which filmed the journeys of five young British tailors as they created individual bespoke pieces using Australian Merino wool fabrics from the historic mill.

In a series of short films, available to view at www.campaignforwool.org, the five tailors shared their passion for craftsmanship, bespoke, sustainability and wool. Another short film in the series featured Francesco Barberis Canonico, who is 13th generation of the family-owned mill, sharing his vision for the future of tailoring.

The five tailors' bespoke creations were on display during Wool Month at a special 'Making it' event in London at which there was also a special discussion, hosted by writer Paul Coughton, about sustainability, craft, style, and the art of bespoke.



The five young tailors in front of London's iconic Wellington Arch, pictured with writer Paul Coughton and Francesco Barberis Canonico.

John Smedley circularity project



Merino wool apparel from John Smedley that contains a blend of virgin and recycled wool.

British knitwear manufacturer John Smedley announced a circularity project that utilises recycled Merino yarns created in partnership with iinouiio – a Yorkshire-based textile recycling mill located 50 miles from John Smedley's headquarters in Derbyshire. Waste yarns from John Smedley's production process are collected from the factory floor and made into new yarns with 50% virgin Merino wool and 50% recycled Merino wool, which are then knitted into products available to buy at www.johnsmedley.com.

Walker Slater's 'Journey with Wool'



Two of Walker Slater's signature styles made with a lightweight tweed woven from fine Merino wool.

In collaboration with the Campaign for Wool, Woolmark and Harris Tweed Hebrides, tailor and clothing brand Walker Slater held an instore event in London to highlight the visual and tactile 'Journey of Wool' from shearing to garment. Different wool types were highlighted as the perfect styling partners, including fine Merino knitwear pieces and fine worsted tailoring. Founded in 1989 in the Scottish Highlands, Walker Slater has stores in Edinburgh and Glasgow as well as London. www.walkerslater.com

'Women in Tailoring' celebrate wool



AWI's The Wool Lab sourcing guide was a big hit at the event. PHOTO: Rikesh Chauhan RKZ

A 'Women in Tailoring' event was held to highlight the importance of women in the whole wool manufacturing, design and tailoring pipeline. AWI's European Product Marketing Manager Rebecca Kelley was the host presenter and showcased The Wool Lab sourcing guide. There was a key panel discussion on trends and design in wool textiles, with representatives from Dormeuil, Moon, Holland & Sherry, Harris Tweed Hebrides, Eco Luxe and Campaign for Wool.

Woolmark and the Campaign for Wool

Woolmark in London has a close, collaborative, working relationship with the Campaign for Wool which provides a further platform for Woolmark to promote Australian wool and Woolmark certification to a broader range of UK mills, brands, retailers, educators and the media.

Furthermore, the presence of Woolmark at joint events, as a representative of the world's largest and predominant wool-growing nation, presents a united front for wool which is appreciated and valued by UK textile industry stakeholders.

As well as supporting Wool Month, Woolmark holds other collaborative events in the UK during the year with the Campaign for Wool. Below are two examples.

'Exploring the potential of wool' at London Craft Week



During London Craft Week in May, the Woolmark UK team in partnership with Campaign for Wool and The Mills Fabrica venue hosted a panel discussion exploring the potential of wool. Notable guests included representatives from the UK Fashion and Textile Association, Paul Smith, Burberry, John Smedley and Rapha.

At the event, attendees heard from experts discussing topics including innovative approaches to designing with wool, creating wool fabrics and products in the circular economy, commercialising new technologies, and the evolving legislative landscape. In addition to the discussions and networking, product innovations from Woolmark and panellists, plus The Wool Lab sourcing guide, were on display.

'Rediscovering one of nature's most innovative fibres' at London Design Week



In September, as part of the Material Matters trade show in London, Woolmark in collaboration with Campaign for Wool hosted a panel-led talk titled 'Wool: Rediscovering One of Nature's Most Innovative Fibres'. Chaired by IWTO Secretary General, Dalena White, the panel comprised AW Hainsworth Managing Director Amanda McLaren, Merino woolgrower Lesley Prior, and founder of textile innovator BYBORRE Borre Akkersdijk.

The panel delved into wool's potential to support a more sustainable future, exploring its role in reducing the textile industry's reliance on synthetic materials. Experts discussed wool as a circular and regenerative fibre, its unique position at the crossroads of heritage and technology, and how wool is one of nature's most remarkable innovations.

TRAINING RETAIL STAFF INCREASES WOOL SALES

PHOTO: andresr

Woolmark works with brands and retailers to help educate their staff about wool. The training builds their knowledge and confidence to invest in wool product lines, and also helps the shop floor staff advise customers more effectively which increases wool purchases.

Woolmark has been delivering wool training programs to brands and retailers in key markets for many years. More than 80 training programs were delivered during the 2023/24 financial year to international and Australian brands and retailers.

Training is often provided by Woolmark to support brands/retailers with the launch and marketing of a new wool collection, particularly if Woolmark assisted with the product development. However training can be provided as a stand-alone service to brands/retailers that have an existing wool product range, especially if the brand/retailer is a Woolmark licensee or they are retailing Woolmark-certified products.

The aim of the training is to increase sales of the brand/retailer's wool apparel and related products, which directly benefits Australian woolgrowers by building the demand for wool.

Types of retail staff targeted with training

The training is aimed at two broad types of staff within brands and retailers: (1) the back room decision makers, and (2) the shop floor staff.

Back room decision makers

The back room decision makers are the company's buyers, product developers, sourcing teams and merchandisers. The training provides them with a strong knowledge about wool, the product manufacturing process, and the latest innovations and trends, which stimulates their interest and builds their confidence to stock and retail wool products in their stores.

"The back room staff get to really understand the wool supply chain, so they know the right questions to ask and specifications required to develop and source wool product lines," said AWI Program Manager - Education Extension, Kelly Mcavoy.

"The training also provides them with a firm understanding of the unique attributes of wool, which enables their products to take full advantage of wool's technical and aesthetic benefits. This can help them create product differentiation in the market place and build a competitive advantage."

Woolmark can also arrange unique tours to further educate and inspire key brands and retailers about wool. These can be tours to Australia so they can see the on-farm source of Merino wool and be connected with woolgrowers, or they can be tours of the wool supply chain to learn more about wool processing, innovations and sourcing.

Shop floor staff

The shop floor staff are the front-line staff who talk to, interact with and actually sell the products to customers. Consumers can be influenced by many things when considering a purchase: price, quality, style, colour, fabric, advertising, to name a few. However, it is often the shop floor staff who steer the customer towards a particular choice.

"It is the knowledge and expertise of the customer-facing retail staff that often gives consumers the confidence to make the purchase. Consequently, AWI works with many of its retail partners to help educate their sales staff about the natural properties and benefits of wool, so they can confidently advise the customer," Kelly said.

"By getting to understand the superior qualities of wool garments, staff working on the shop floor effectively become 'product ambassadors'. They have the knowledge required to educate their customers, answer queries and ultimately influence their purchasing decisions. Training retail staff to become wool 'product ambassadors' is a cost-effective way for AWI to market wool.

"It's always very encouraging to see retail staff and customers in the shop talking about wool. This can only be good for both the wool industry and, ultimately, Australian woolgrowers."

Training content and delivery

The exact content of the training varies depending on the brand/retailer, and which type of staff and how many are being trained. Bespoke wool education programs are available for staff of all levels.

The Wool Appreciation Course is often at the core of the training, and is suitable for the back room decision makers through to marketing teams and floor staff. The course provides

them with a solid understanding of the benefits of the wool and a framework of knowledge about wool production on-farm through to the manufacture of wool yarns, fabrics and products.

The Wool Appreciation Course is also available online as one of the many courses available to retail staff on the digital Woolmark Learning Centre (www.woolmarklearningcentre.com).

Training is often tailored to focus on the actual wool product lines which the retailer is launching or currently selling. To complement the training, shop floor staff can be provided with assets such as fact sheets and FAQs summarising, for instance, wool's benefits and caring for wool. Some of this collateral is suitable for giving to customers in store and complements the messaging on point of sale displays.

"It's always very encouraging to see retail staff and customers in the shop talking about wool. This can only be good for both the wool industry and, ultimately, Australian woolgrowers."

Kelly Mcavoy, AWI Program Manager

Training can be delivered by Woolmark education experts directly to the brand/retailer's many staff, although the training often works well, and is more efficient, in a train-the-trainer format. For example, Woolmark experts can train retail store managers who then train their own staff.

Delivery of training courses by Woolmark can be done online instead of, or in addition to, in-person training. For large retailers who have their own staff education programs, often the best approach is to integrate the Woolmark online training into the retailer's existing digital learning platforms.

As well as educating retail staff working in brick-and-mortar stores, the training can also be provided to digital merchandising staff to increase sales via the retailer's online stores. Woolmark can work with brands/retailers to include wool educational content (imagery and information) across their e-commerce and social media platforms to help them educate their consumers about wool and their wool products.

EXAMPLES OF RETAIL TRAINING

Below are six examples of the many training programs that Woolmark has recently rolled out to brands and retailers across the world. Also see the articles in this edition of *Beyond the Bale* about **Lafayette 148** (page 44) and **Tod's** (page 45).



ITALY: BENETTON

For its Autumn/Winter 2023/24 collection, iconic Italian fashion brand Benetton launched more than 1.5 million, Woolmark-certified, 100% Merino wool knitwear garments. To support the launch of a collaborative marketing campaign for the collection, Woolmark supplied educational content about the benefits of Merino wool and Woolmark certification for Benetton staff's e-learning platform. The bespoke retail training video was watched by more than 1,200 Benetton staff.



INDIA: TANEIRA

Part of the Tata Group, India's largest business conglomerate, Taneira is a womenswear brand with stores across India. In November 2023, Woolmark trained 40 Taneira staff, mainly store managers and customer experience officers and the backend team from merchandising and sourcing. The training covered the benefits of Australian Merino wool, Woolmark certification, and was followed by a discussion on a potential joint development.



CANADA: HUDSON'S BAY

As part of a collaborative marketing campaign, Woolmark provided a customised six-part video/digital training program to the shop-floor sales staff of iconic luxury retailer Hudson's Bay, to educate them about the natural benefits of wool so they could advise their customers effectively. The training also addressed topics such as wool care, common customer questions and the significance of Woolmark certification. More than 7,200 Hudson's Bay staff completed the training.



JAPAN: LVMH

Woolmark in Japan recently hosted a Wool Appreciation Course seminar for staff from LVMH, the world's largest luxury fashion conglomerate. Participants included shop staff from renowned LVMH brands such as Louis Vuitton, Dior, Givenchy and others. The initiative not only equipped attendees with a knowledge about wool to enable them to offer more accurate and informed advice to customers, but it also helped Woolmark foster deeper connections with the brands.



AUSTRALIA: AUSTIN GROUP

Four educational workshops were delivered online in March to retail store managers of the Austin Group, which is the parent company of Cable, Perri Cutten and GAZMAN. The training was held in the lead up to the launch of Cable and Perri Cutten's Woolmark-certified Australian Merino wool knitwear range for Autumn/Winter 2024. The training comprised the Wool Appreciation Course and topics including wool care, with a particular focus on the products in the two new collections.



CHINA: ICICLE

Staff from leading Chinese eco-luxury brand ICICLE have visited Australian wool-growing properties on several occasions during the past 14 years to learn more about, and be inspired by, the source of Australian wool. As a result, the brand regularly includes Australian Merino wool in its apparel collections. The founder and staff of ICICLE, Chinese media representatives and Woolmark staff are pictured here on a visit in June to the Elsom's property at Warrabkook in Victoria.

LAFAYETTE 148 DEBUTS WOOLMARK COLLECTION

PURE NEW WOOL

New York-based luxury womenswear brand has launched its inaugural Woolmark-certified collection comprising 32 sophisticated garments crafted from Merino wool.

Lafayette 148 was founded in New York in 1996 with the guiding principle that women deserve beautiful clothing created for women's needs. The brand has become known for intelligent, understated design, impeccable craftsmanship, premium fabrics, and a modern, New York aesthetic.

Named after the address in the SoHo neighbourhood where the brand was initially located, Lafayette 148 has grown into a global brand with 36 boutiques and outlets across North America and China. Its garments are also available in luxury stores including Bergdorf Goodman, Neiman Marcus, Nordstrom, Bloomingdale's, as well as hundreds of high-end specialty boutiques across North America. It also ships internationally.

In 2008, Lafayette 148's manufacturing was relocated to a state-of-the-art production facility in Shantou, China, which enables the brand to guide every step of production from design to final garment. Still headquartered in New York, today the company employs more than 300 people in the United States and 1,000 worldwide.

New Woolmark-certified collection

Lafayette 148 prides itself on uncompromising quality and its use of luxurious materials. Merino wool is a favourite fibre of the brand which it prizes for its soft, light handle, and its breathability that provides seasonless versatility.

It was a natural progression for Lafayette 148 to partner with Woolmark and launch a Woolmark-certified Merino wool collection. The new Autumn/Winter collection uses superfine Merino wool in sharp tailoring, reversible outerwear and lofty knitwear. It comprises 32 pieces including dresses, skirts, pants, shirts, jumpers, coats and blazers, plus a beanie and snood.

Each piece proudly carries either Woolmark's Pure New Wool logo (100% wool content) or its Wool Rich Blend logo (50% or more wool), signifying the garments have passed Woolmark's rigorous testing for quality.



"We've always sourced our wool from the finest mills in the world, so it's very exciting to offer even further transparency of its unparalleled quality."

Emily Smith, Creative Director of Lafayette 148

Lafayette 148 is promoting the collection through a digital and social media campaign. This includes a landing page on the brand's website containing information and visuals about the wool fabrics used in the collection, the benefits of Merino wool, and the meaning of Woolmark certification. The home page of the website also includes a promotion of and link to a Wool Shop page at which customers can purchase the garments online. Lafayette received in-kind support from Woolmark to help with the collection's promotion.

Lafayette 148 and Woolmark are now working on Woolmark-certified Resort 2025 and Spring 2025 collections.

Retail training about wool to Lafayette staff

Earlier this year, prior to the launch of the collection, Woolmark engaged with Lafayette 148 to develop a comprehensive retail education program for the brand's floor staff and managers.

The program consisted of Woolmark staff providing an in-person presentation of the company's Wool Appreciation Course, plus delivery of a bespoke six-part video series covering topics such as sustainability, wool care, the Woolmark Certification Program, and common customer questions.

Woolmark also provided Lafayette 148 staff with wool factsheets and a customised Wool Care Guide that related to the brand's wool collection.



A selection of garments in Lafayette 148's inaugural Woolmark-certified collection.

More information: www.lafayette148ny.com/woolmark

TOD'S BRINGS LA DOLCE VITA TO WOOL COLLECTION

Meticulously crafted from 15-micron Merino wool, Tod's new Field Jacket is the hero piece in the Italian brand's inaugural Woolmark-certified collection, highlighting a commitment to craftsmanship and premium, natural materials.

Tod's is an Italian fashion brand specialising in luxury footwear, ready-to-wear clothing and leather goods. The brand has its origins in the 1920s when the grandfather of the current CEO opened a small cobbler's workshop at his home in the Marche region of Italy.

Since those humble beginnings, the Tod's brand has become a world-renowned icon of Italian excellence, with 231 boutiques across the world and revenue of €563 million (A\$912 million) in 2023. Tod's represents a lifestyle that combines timeless elegance and uncompromising quality, closely tied to the concept of Italian flair and good taste.

Tod's is increasingly loved by a growing number of customers, internationally and of all age groups. Last year was another good year for the brand, with double-digit growth in sales.

New Woolmark licensee

As a natural extension of its commitment to quality, Tod's recently became a Woolmark licensee and launched its inaugural collection of Woolmark-certified menswear apparel – including jackets, jumpers and shirts – for the current Autumn/Winter season.

AWI Regional Manager, Central & Eastern Europe, Francesco Magri, says fostering a relationship with Tod's is part of a strategy to build the reputation of Merino wool and Woolmark in the lucrative market for luxury goods.

"The collaboration with as prestigious a partner as Tod's has provided Woolmark with an opportunity to showcase the exceptional benefits of Merino wool to a global audience of premium consumers while also increasing awareness of the quality assurance provided by Woolmark certification," Francesco said.

"Tod's is a globally recognised and respected luxury brand, renowned for its craftsmanship and high-quality products. Woolmark and Tod's share many of the same values and so the collaboration between the two brand's is a natural partnership.

"By fostering this solid relationship with Tod's, Woolmark has enhanced the visibility and reputation of Merino wool in the luxury market, reaching a wider audience that values high quality products."



The Woolmark-certified Tod's Field Jacket embodies the superior quality of Merino wool.

The Woolmark-certified collection also reflects Tod's commitment to sustainability and its promotion of circular production and consumption models along the entire value chain.

Tod's Field Jacket

Tod's men's Field Jacket is the hero of the new Woolmark-certified collection. Made in Italy, the Field Jacket has a water-repellent fabric made with a 100% 15-micron Merino wool yarn. It is a fusion of style and performance; the Merino wool provides extraordinary softness, warmth and breathability, while also providing robust protection against the elements.

Tod's attention to detail elevates the Field Jacket, integrating leather accents with a military-inspired design. Strategically placed pockets blend functionality with style, ensuring this piece is as practical as it is luxurious. It offers a versatile outerwear solution that excels in both urban settings and outdoor adventures.

Tod's is promoting the Field Jacket through an in-store, digital and social media campaign. This includes the release of a 30-second inspirational video showcasing the source of Merino wool on Australian farms and how the premium, natural fibre is fundamental to the quality of the final product.

More information: www.woolmark.com/tods



Retail training educates Tod's staff about wool

Prior to the launch of Tod's Woolmark-certified collection, Woolmark conducted a retail training session for 15 directors and ready-to-wear specialists from Tod's top boutiques in Italy. The aim of the training was to help educate Tod's about the benefits of Merino wool, so Tod's retail staff can advise consumers effectively and increase purchases of the brand's wool products.

The training session in June was in the format of a train-the-trainer session, so the 15 attending Tod's staff could then pass on their new knowledge about wool to their own retail staff.

The joint session began with Tod's providing insights into the ready-to-wear fashion landscape, followed by Woolmark staff delivering its Wool Appreciation Course with a deep dives into topics including the attributes of Merino wool, microns, yarn counts, fabric compositions, and wool care.

"By leveraging Woolmark's authority to champion Merino wool's quality, the training was well received by Tod's staff who became not only educated about the fibre but also inspired. They showed exceptional enthusiasm for Merino wool which they then passed on to customer-facing staff at Tod's," said AWI's Francesco Magri.

Woolmark has also provided training to 100 more of Tod's staff across Europe, the US and South Korea, who have all been really enthusiastic in discovering the qualities of Merino wool. Further training is planned.

WOOL SHOWCASED AT THE AMERICA'S CUP

The performance benefits of Australian Merino were showcased in the sailing uniforms worn by the Luna Rossa Prada Pirelli teams at the 37th America's Cup and its preliminary regattas.



The Luna Rossa Prada Pirelli team competing in wool racing uniforms off the coast of Barcelona in October.

Woolmark returned as the official technical partner for the Luna Rossa Prada Pirelli sailing team for the 37th America's Cup and its preliminary regattas held from September 2023 through to October this year. The collaboration followed on from the highly successful showcase of Australian wool during the previous America's Cup.

With a focus on technical performance, and the added benefit of not contributing to microplastic pollution in the world's oceans, Merino wool is the preferred apparel fibre for Luna Rossa Prada Pirelli.

Woolmark co-developed the sailing team's Merino wool-rich performance-driven training and racing uniforms. The custom-made kit included Merino wool-rich T-shirts, hoodies, shorts, leggings, a cycling suit, a waterproof jacket and a revolutionary ultralight windbreaker.

AWI CEO John Roberts says that product innovation was a crucial factor when designing the technical kit for the Luna Rossa Prada Pirelli team.

"With a focus on lightness, elasticity, strength and moisture wicking properties, our internal experts met with the Luna Rossa Prada Pirelli product development team armed with a selection of the best commercially available Merino wool fabrics. Where further development was needed, the teams worked together to create unique fabrics destined to deliver the added element," John said.

HIGHLIGHT RESULTS

(2022-2024)

2.2 billion
media readership
\$7.0 million
advertising value
815
media clippings

The iconic Woolmark logo, owned by Australian woolgrowers, was proudly displayed on the sleeve of all the apparel as well as on the sails of the Luna Rossa Prada Pirelli yachts during training and racing.

"Through Woolmark's support of the Luna Rossa Prada Pirelli team at the 36th and 37th America's Cups in 2021 and 2024, Australian Merino wool has been showcased to millions of potential customers," John added.

"Furthermore, significant interest has been generated from global apparel brands that have since worked with Woolmark on product development initiatives. It has been a marketing triumph."

"This partnership has cemented the strong link between the world of sport and the world's original performance fibre, Merino wool."

John Roberts, AWI CEO

World class performances in wool

The Luna Rossa Prada Pirelli sailing team performed fantastically well during this past year's series of races. The team progressed as far as the final of the Louis Vuitton Cup in Spain, where it was narrowly beaten by the Ineos Britannia team which won the right to challenge the defending Emirates Team New Zealand in the America's Cup.

For the first time at the America's Cup, there was also a women's competition, known as the Puig Women's America's Cup, and a youth (under 25 years) competition known as the Unicredit Youth America's Cup.

Like the men's Luna Rossa Prada Pirelli team, the women's and youth teams wore the wool-rich uniforms during training and racing, and the Woolmark logo was displayed on the sails of each of their yachts. In spectacular results, both teams convincingly won their respective America's Cup competitions, which reflects exceptionally well on the wool-rich uniforms that they wore.



The Luna Rossa Prada Pirelli women's (top) and youth (below) teams celebrating winning the inaugural women's and youth America's Cups respectively.

Much more than a race...

What benefits has the partnership delivered to woolgrowers?

1. Increased consumer awareness of Australian wool's technical and environmental benefits amongst a global audience.
2. New business opportunities for global performance brands to work with Woolmark's teams on product development with Australian Merino wool.
3. Product sales of Woolmark-branded sailing apparel and other activewear.

Woolmark's partnership with the Luna Rossa Prada Pirelli sailing team was about much more than simply developing and equipping the team with wool-rich training and racing apparel. The project enabled Woolmark to amplify the benefits of Merino wool as a performance fibre to an enormous, global consumer and trade audience.

The 37th America's Cup regatta was attended by 2.5 million people during the 59 days of the event in Spain, and it was broadcast globally to millions more fans across multiple platforms.

Business development

Woolmark invited CEOs and other senior trade contacts to the regatta to showcase to them the Merino wool-rich apparel in action in an innovative, performance setting. The ultimate aim was to encourage them to use more wool in their own collections and consider partnering with Woolmark in future business development projects.

Amongst others, those invited by Woolmark were from Zegna Baruffa, Loro Piana, Vitale Barberis Canonico, Reda Group, Schneider Group, Benetton, Tod's, Mover Sportswear, Pitti Immagine, Italian Fashion Council. IWTO president Klaus Steger also attended.

During the past few years, Woolmark has also been exhibiting the innovative Merino wool-rich sailing gear to a trade audience in its booths at trade shows and other events. Imagery from the project has often also been included in the design of the Woolmark booth (see page 55).

Press coverage

The Luna Rossa Prada Pirelli Merino wool-rich apparel has garnered much press coverage during the past few years and especially during the regatta. Woolmark invited 19 members of the press – from Italy, Spain, France and Germany – to the regatta resulting in further positive coverage of Merino wool being used as a performance fibre.

During the project from 2022 to 2024, the print, online and social media readership totalled an enormous 2.2 billion, worth \$7.0 million in advertising value. There were a total of 815 media clippings comprising 458 print and online clippings and 357 social media clippings.



An example of recent press coverage about the Merino wool apparel in La Gazzetta dello Sport, the most important sports newspaper in Italy.

Influencer engagement

Woolmark also invited 17 influencers – from Italy, Spain and France – to the regattas. They posted imagery and positive messages about Merino wool to their followers, who total 3.7 million on Instagram. Their posts generated an earned media value of \$1.05 million.



Examples of imagery posted by the influencers. Pictured are Luca Vezil and Giovanni Masiero.

Woolmark social media

Woolmark also used the partnership as a launch pad to educate consumers about the performance

benefits of wool, running a social campaign across its Woolmark YouTube, Instagram and Facebook channels. In 2024 alone, the social campaign received 181.6 million impressions (the number of times the campaign was seen) and 9.6 million video views, which were both more than three times Woolmark's target.



Wool Performance Challenge

The Luna Rossa Prada Pirelli sailing team was also Woolmark's partner for the 2023 edition of the Woolmark Performance Challenge. This competition encourages tertiary students from across the world to develop innovative new product applications for Merino wool within the sports and outdoor market – see page 57. The 2023 finalists developed innovative new uses for Merino wool applicable to the Luna Rossa Prada Pirelli team, from Merino wool blended with marine waste to glucose-releasing technology.



Luna Rossa Prada Pirelli team members Romano Battisti and Bruno Rosetti, with AWI Regional Manager, Central & Eastern Europe Francesco Magri, presenting the 2023 Woolmark Performance Challenge award to the winner of the competition, Joon Han from South Korea, at the ISPO sporting and outdoor goods trade show in Munich, Germany, in November 2023.

WOOL WORKWEAR IS A BELTER IN THE SMELTER

PHOTO: vm

US company Burlington Fabrics uses Australian Merino wool to manufacture a commercially successful fabric that is not only flame resistant but also repels molten metal splashes. This is a good example of how wool is an ideal fibre for the protective workwear market.



Noriske molten metal resistant PPE made from Burlington Fabrics' BodyShield™ wool fabric. MAIN PHOTO: simonkr

In April, the Woolmark Americas team visited the Carolinas, a region well-known for textiles in the US, to have collaborative discussions with wool processors there on opportunities for growth in wool textile production stateside.

One of the companies visited was Burlington Fabrics, a leader in textile innovation and production for more than a century. It manufactures fabrics for markets including activewear, military, interiors, medical, and personal protective equipment (PPE).

Burlington's BodyShield™ wool fabric

One of the many successful textiles that Burlington produces is BodyShield™, a fabric which is resistant to flames and molten metal. It is designed for PPE for people working in smelters, foundries, steel mills and aluminium plants.

"The development of our innovative BodyShield™ fabric was initiated more than 25 years ago by a molten metal aluminum smelter in Canada, which identified a critical need for a lightweight, washable garment that not only possessed flame-resistant properties but also effectively sheds small splashes of molten metal," said Bertrand Ross, Account Manager at Burlington.

"In response, Burlington collaborated with Woolmark to modify the Zirpro flame resistant treatment technology, tailoring

it to fit our manufacturing processes. This adaptation ensured that our fabric would meet the rigorous demands of the smelting environment.

"Unlike traditional flame resistant fabrics, onto which molten metal can stick, our fabric allows liquids to roll off, ensuring safety and comfort. It proudly holds the highest ISO 11612 rating of D3/E3, guaranteeing exceptional protection."

"With more than 25 years as a trusted choice for some of the largest smelters in the industry, our BodyShield™ fabric made from Australian wool has proven its worth time and again. Its blend of comfort, durability and protection has made it a staple in the workwear market."

Bertrand Ross, Burlington Fabrics

Bertrand says another key benefit of wool for workers is its ability to adapt to temperature changes.

"Whether it's a chilly winter day or a hot summer afternoon, Merino wool keeps workers comfortable by regulating their body temperature. Additionally, it effectively manages moisture, absorbing sweat without leaving them feeling damp – a critical feature for those facing demanding work conditions. Plus, it offers impressive durability with increased tear strength," he said.

"We source 100% wool tops from reputable suppliers in Australia, a country known for its exceptional Merino wool quality, which ensures we use only the best materials."

Sustainable sourcing and manufacturing

By prioritising eco-friendly materials and processes, Burlington ensures its fabrics not only perform exceptionally well but also have a minimal environmental footprint.

"Our use of 100% Merino wool means that when the fabric reaches the end of its life cycle, it naturally decomposes, leaving no harmful residues behind. PFAS, 'forever chemicals', have never been part of our production process for the BodyShield™ fabric meaning it is a safe and reliable choice for workers looking for effective protection without harmful chemicals," Bertrand said.

"Our commitment to sustainability is also reflected in our manufacturing process; all steps – from spinning and weaving to dyeing and finishing – are carried out in our US facilities. This allows us to closely monitor our operations, reducing waste and minimising our carbon footprint."

Commercially available products

Burlington collaborated with its garment development partner, Noriske, during the original development of the BodyShield™

MURALGARRA MERINO FROM WA

fabric, a partnership that continues to this day to create functional and durable solutions that prioritise worker safety and comfort.

Founded in 1982, Noriske is a 100% Canadian company that is specialised in producing high-quality PPE for optimal protection against splashing and radiant heat from molten metals. Its customers in this sector include large companies such as Rio Tinto and Alcoa.

"Noriske produces a large variety of products with the BodyShield™ fabrics including shirts, pants, vests, winter jackets, balaclavas and pitcoats. We offer more than 100 different items in this specific wool for the molten metal industry," said Noriske Business Development Director, Raphaël Côté.

"The high quality, durability and general comfort of the fabric are key reasons for us choosing it. Wool is great for the temperature variation. In the molten metal industry, as you can imagine, the environment can be very hot and wet. The natural properties of the wool gives the wearers more comfort in a changing environment, as it will dry quickly and stay cooler in general.

"We have been supplying products made from these wool fabrics to customers for more than 25 years and we have no intention in changing a great recipe."

Burlington's new developments with wool

Burlington is expanding its Merino wool product offering with products that meet the needs of other markets.

"We're dedicated to continuous innovation in fabric technology. Recently, we launched a new BodyShield™ blended fabric that not only delivers superior molten metal splash protection but also incorporates enhanced safety features, including arc flash protection and improved welding protection. These advancements ensure optimal safety for workers exposed to diverse hazards in industrial environments," Bertrand said.

"Looking ahead, our focus is on developing a range of versatile fabrics that meet the specific demands of various applications. This includes next-generation materials engineered for the Canadian military, prioritising both durability and comfort under challenging conditions. Additionally, we aim to create next-to-skin knitwear featuring advanced wool blends, designed to provide exceptional thermal regulation and moisture management, thereby enhancing overall wearer comfort and performance."

Launched last year, Muralgarra is a Merino wool clothing brand named after the remote sheep station 500 km north of Perth on which the brand's founder Neil Morrissey was brought up.



The maxi dress, T-shirts and shorts from the Muralgarra range.

The Morrissey family has been continuously involved in the Western Australian sheep and wool industry since 1841 when Neil's ancestor Michael Morrissey arrived in Fremantle from Waterford in Ireland. Michael established a large wool-growing business near Geraldton and then expanded eastwards into the Yalgoo region. In 1873, Michael's son John established Muralgarra, named after a Wadjjarri word meaning 'place of many flowers'.

Although over the years Muralgarra station slipped out of the family's control, Neil's father bought back the property in 1988. It was here that Neil and his siblings Simon and Jacinta were brought up, completing their schooling via the School of the Air. Despite the remoteness, Neil is very proud of being raised at Muralgarra and the property remains very important to him.

Being a large, rangelands property, mustering and shearing were major events at Muralgarra. Mustering took a full month and was assisted by using an aeroplane to locate the sheep for the stockmen. Neil continues the tradition of aerial mustering to this day and believes the world is best seen from the left hand seat of a Cessna.

Launch of the Muralgarra brand

With the love of Merino wool in his blood, Neil is keen to share with the wider public his appreciation of the natural and sustainable qualities of the fibre, including its softness, breathability, durability and odour resistance.

Last year, with the involvement of the wider family, Neil launched a clothing brand, named Muralgarra. The brand sells a range of women's crop tops, singlets, leggings and dresses as well as unisex T-shirts and shorts – with a focus on everyday and active wear enhanced by the luxurious comfort of Merino wool.

Available in a range of colours, the apparel is made from 100% superfine Australian Merino wool of 18 micron. Keen to support the Western Australian apparel industry, all the Muralgarra garments are proudly designed and made in Perth.

Tapping into the more than 180 years of wool-growing knowledge of the Morrissey family, the brand is eager to showcase the natural benefits of Merino wool to a wider audience across Australia and beyond.

More information: www.muralgarra.au

ECHIDNA KIDS: TRACEABLE MERINO WOOL PRODUCTS

Set up by woolgrower Lachie Anderson, Echidna Kids is a family-owned brand that produces and retails 100% Merino wool children's garments made with wool from Lachie's own farm at Meredith in Victoria.



"Echidna Kids is an Australian family-owned business driven by a deep passion for wool and exceptional design. We stand by our promise: delivering products of unparalleled quality while upholding our principles of environmental responsibility."

**Lachie Anderson,
Echidna Kids**

The Puggle blankets, one of three styles of 100% Merino wool blankets (above) and 100% Merino wool beanie and scarf (below).

Launched earlier this year, Echidna Kids sells a range of knitted blankets, beanies and scarves, with jumpers coming soon.

The brand takes pride in its approach to production, emphasising a fully traceable process that ensures sustainability and ethical practices every step of the way. The result is premium, high-quality Merino wool garments designed to last a lifetime.

In its marketing, the brand emphasises the natural and sustainable origin of the superfine Merino wool used in the products – and it can guarantee this because the wool in the products is all sourced from Lachie's own farm.

The family is heavily invested in every aspect of farm life, with a commitment to sustainable land practices and optimal care of their sheep, including the provision of multi-species pastures and natural shelters.

"Our passion lies in farming and our dedication to improving our farming practices drives us to advance sustainable methods year after year. We continually strive to improve our practices, embrace new methods, and learn from our experiences, all with the goal of producing premium, traceable garments crafted from our superfine Merino wool," Lachie said.

"The enterprise revolves around breeding our own sheep to produce wool tailored to our exacting standards. Each fleece undergoes rigorous selection based on criteria such as micron count, staple strength, and fibre consistency, ensuring a soft, itch-free final product."

Traceable and responsible production

Lachie grew up on a farm in Western Victoria before studying Wool and Fibre Marketing at the Melbourne College of Textiles. He has spent the past 30 years owning and managing a design business as well as the farming operation.

"With Echidna Kids, I wanted to combine my business, design and agricultural skills to produce a truly unique product for children in both Australia and overseas," he said.

Although the brand's products were launched in March this year, the production process began almost a year earlier in July when property's sheep were shorn, and the finest and strongest fleeces selected for the Echidna Kids clothing range.



In September, the wool began its processing by being scoured at E.P. Robinson in Geelong before then progressing through several further stages of processing until it was delivered to Lachie in December as dyed yarn. The yarn was then knitted into the brand's products.

"We prioritise local manufacturing to ensure our garments are of the highest quality. They are fully traceable, from careful material selection to the manufacturing process, all produced within Australia," Lachie said.

"Our garments are thoughtfully designed, embodying the softness, durability, and numerous benefits of Merino wool. Unlike synthetic alternatives, wool aligns with a circular model of textile production, minimising environmental impact as a biodegradable and renewable resource.

"Every element of our garments, from thread to labels to buttons, is made from 100% natural materials, reflecting our commitment to sustainability that begins on the farm. We are dedicated to considering the entire lifecycle of our products, from sourcing materials to the end use."

More information:

www.echidnakids.com

www.instagram.com/echidnakids

FUTURE WOOL INDUSTRY LEADERS SHINE IN CHINA

Ten up-and-coming members of the Australian wool industry recently visited China as participants in AWI's 2024 Australian Future Wool Industry Leaders program, and returned to Australia with optimism having witnessed China's high level of investment in the wool industry.



The 2024 Australian Future Wool Industry Leaders group with the Chairwoman of the Nanjing Wool Market, Madam Yang Xiaoxiong, and the Australian Ambassador to China, Mr Scott Dewar.

Back row: **Emma Pearson**, woolgrower, New England, NSW; **Miranda McGufficke**, woolgrower, Willarney, Cooma NSW; **Ben Stace**, wool broker, Australian Wool Network, Vic; **Kate McBride**, woolgrower and advocate, Tolarno Station, NSW/SA; **Jack Finch**, wool broker and woolgrower, Shute Bell, NSW; **James Carter**, woolgrower and ag services, Dalby, Qld.

Front row: **Clive Silcock**, woolgrower, Gringegalgon Merino Stud, Vic; **Brittany Bolt**, woolgrower and researcher, Wagin, WA; **Tom Sleigh**, woolgrower, Koorringal, Jerilderie, NSW; **Pdraic (Paddy) Lowe**, woolgrower and sheep classer, Crookwell, NSW.

The Australian Future Wool Industry Leaders program was organised by AWI and is a key output from a grant provided by the Australian Government's National Foundation for Australia-China Relations (NFACR). The participants in the program undertook a 10-day study tour of the Chinese wool industry, which included visits to Chinese wool processing mills and attendance at the Nanjing Wool Market Conference.

"This is an outstanding group of young people involved in the wool industry. Their participation in the program showed the strong commitment and passion of Australian wool industry youth engaging with key partners throughout the wool supply chain," AWI CEO John Roberts said.

"The group was nominated and selected through AWI's Wool Industry Consultation Panel (WICP) for their commitment to the industry and their drive for engagement with the wool supply chain. They are aged 20 to 30 years and represent five Australian states."

The 10-day program included visits to the flagship stores of apparel brand ICICLE and

homeware brand The Beast Home, home textile manufacturer Wuxi JHT, the Wool Education Centre at Donghua University, wool processors Tianyu and Redsun, yarn spinner Xinao, textile manufacturer Shanghai Challenge and the vertically integrated Nanshan Group.

A key part of the tour was participation in the 35th Nanjing Wool Market Conference which was attended by more than 400 delegates from all major wool-growing countries and included the President of International Wool Textile Organisation, Klaus Steger.

Future leaders building relationships

An Australian Woolgrower Reception attended by more than 50 key Australian and Chinese traders saw the Future Wool Industry Leader group front and centre, engaging with delegates across all sectors of the industry.

"We have learnt an exceptional amount and look forward to sharing this with friends and family when we return to Australia," said woolgrower Kate McBride.

"It has also been amazing to see the investment in the wool industry over here and it makes us feel the future of wool is bright. While there are many challenges we face with wool-growing, especially low prices at the moment, we are grateful to have a partner in China that understands these challenges."

"This trip is about us learning and opening up new relationships between the next generation of Australian growers and Chinese traders and manufacturers and I've seen it happening before my own eyes."

Kate McBride, woolgrower, Tolarno Station

Other representatives from the group also presented at the Conference, including woolgrower Brittany Bolt on feed efficiency and on-farm methane mitigation R&D, and woolgrower James Carter on the Australian broad wool sector.

China: an important trading market

President of the Australian Council of Wool Exporters and Processors, Josh Lamb, echoed the delegation's positive sentiment saying: "The Future Wool Industry Leaders tour is a great partnership by AWI and the National Foundation for Australia-China Relations. They are a great group of young people with common goals in mind for wool's success but with very diverse ideas and experience. They are a credit to the industry."

CEO of the National Foundation for Australia-China Relations, Gary Cowan, said, "The Foundation is pleased to support AWI's 2024 Future Wool Industry Leaders program. China is our largest wool export market and an important trading partner across all our agricultural industries. Building the capability of the next generation of Australian woolgrowers to engage competently with China, by giving them opportunities to participate in industry building activities and to form enduring relationships with Chinese partners, strengthens the resilience of our trading relationship."

The NFACR grant funding will also be used for a reciprocal arrangement to bring future wool industry leaders from China to Australia at the start of 2025 and then a second Australian delegation will go to China in mid-2025.

WOOLMARK AND MICHELL COLLABORATE IN KOREA

PHOTO: Oleksii LisKonik

Woolmark has collaborated with one of South Korea's major fashion groups, Shinsegae International, on a multi-brand promotion of womenswear made from Merino wool sourced from Michell Wool in Adelaide.



A storefront of one of Studio Tomboy's stores in Korea showing two Merino coats from its new collection which is a result of a collaboration between Woolmark, Michell and Shinsegae International.

Established in 1996, Shinsegae International is one of South Korea's major fashion, beauty and lifestyle companies, with annual sales revenue worth A\$1.5 billion in 2023. As well as distributing global fashion brands – including the likes of Giorgio Armani, Stella McCartney and Paul Smith – Shinsegae International has six of its own fashion brands. It operates a large network of stores nationwide as well as the premier digital commerce platform in Korea for luxury products, S.I. Village.

For the autumn/winter 2024 season, Woolmark is collaborating with Shinsegae International to promote the Merino wool products of four of its six domestic brands: Studio Tomboy, VOV, ILALIL and G-CUT. The womenswear brands are positioned as premium in the market and highly influential among fashion-forward customers in their 20-30s. Together, the brands have more than 200 flagship and outlet stores which bring in about 70% of their revenue, with the remainder being via online sales.

The collaboration also includes Michell Wool Pty Ltd, Australia's oldest and largest exporter of Australian wool fibre. Headquartered in Adelaide, South Australia, Michell Wool is a sixth generation family company that has

been associated with the international wool textile industry for more than 150 years. In this three-way collaboration, Michell Wool has supplied the wool for approximately two thirds of the brands' wool garments and also helped supply content for the marketing campaign.

Campaign promotes Australian wool

The joint marketing campaign with the Shinsegae International brands rolled out in October. Across all four brands, there are approximately 90 different 100% wool or wool blend products being sold, with a total of about 45 tons of wool used. All the products are Woolmark certified.

Under the theme 'Timeless wool, generations of warmth', the campaign educates consumers about not only the long-lasting premium quality of Merino wool for the autumn/winter season, but also the value and heritage of the fibre's Australian origin.

The content of the campaign demonstrates to consumers the journey that Merino wool takes from Michell Wool in Australia to Woolmark supply chain partners Samwon Ilmo and Daekwang Textiles in South Korea where it is spun into yarn, before being transformed into

the wide range of garments by the four brands.

"This collaboration is the brainchild of William Kim, Shinsegae's CEO. Real proof of quality and value can be hard to find, so the mix of Michell's 154 years' experience and our supply partners Daekwang and Samwon, both with Woolmark's stamp of approval and its support for the execution of the marketing campaign was a solution waiting for the question," said David Michell, owner and Executive Director of Michell Wool.

The campaign also emphasises the eco-credentials and benefits of Merino wool – including softness, temperature regulation, elasticity, odour and stain resistance, and easy care – and that the Woolmark label ensures that the apparel products have been rigorous tested for quality, thereby providing customers with confidence in their purchase.

As well as in-store point-of-purchase and window displays, a digital, video and social media campaign focusses on driving traffic to a landing page on the S.I. Village retail platform. This is achieved through sponsored ads on Instagram, YouTube and Kakao Talk Plus Friend (the most widely used messenger in Korea), a home page banner, and an app push to 2.17 million of Shinsegae International's customers.

Additional marketing content was created separately by each brand.

AWI Regional Manager Japan & Korea, Samuel Cockedeey says the collaboration with Shinsegae International is a reflection of Woolmark Korea's focus on premium brands with large volumes.

"Shinsegae International is a major Korean fashion group and, through this collaboration, we aim to increase awareness and significant sales of Australian Merino wool womenswear apparel during the cold autumn/winter season," Samuel said.

"By building a close and successful relationship with Shinsegae International this year, we aim to secure them as a long-term partner and encourage them to develop more Merino wool products for later seasons.

"The highly visible and successful roll out of the promotion could also influence other major fashion groups in Korea to increase their focus on retailing wool products and might lead to business development for Woolmark."

THE FOUR BRANDS IN THE CAMPAIGN

Studio Tomboy

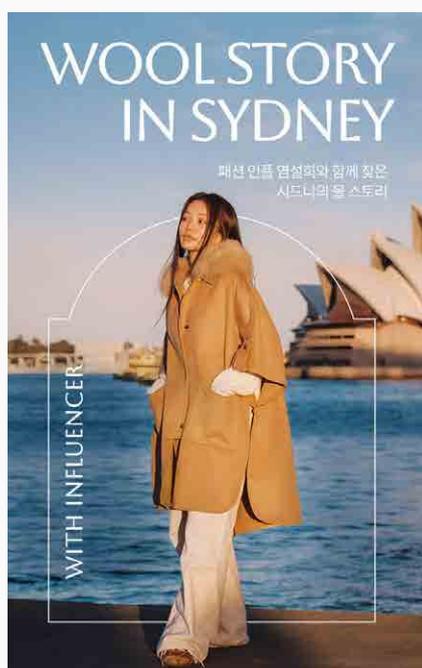
Studio Tomboy blends quality with comfort to create boundary-breaking clothing. The brand has this season increased the proportion of wool in its outerwear pieces, including coats, jackets and jumpers, to make them lighter and more luxurious. As part of the brand's promotion, Korean top model Kim Na Young featured the Merino wool collection on her YouTube channel which has more than 800,000 followers.



Studio Tomboy's in-store promotional displays highlighting the origin of the fibre used in the collection.

G-CUT

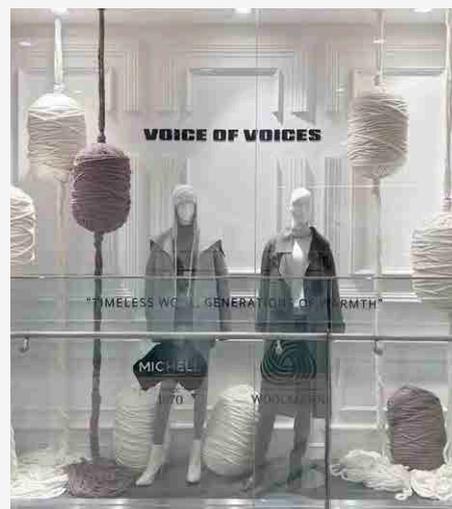
G-CUT breaks away from the cute femininity of existing young casual brands to create products with a refined, contemporary, French chic. For this season, G-CUT has launched a range of wool products with classy, feminine silhouettes and designs. As part of the brand's promotion, influencer @mulbada (who has 417,000 followers on Instagram) flew to Australia to create a video for G-CUT capturing the beauty of Sydney and the benefits of Merino wool.



G-CUT's window display and the promotion featuring influencer @mulbada in Sydney.

VOV (Voice of Voices)

VOV has grown into a leading womenswear brand selling chic and modern styles. As part of the VOV's promotion of this season's Merino wool collection, the brand collaborated with film director Youkim to create a sophisticated video titled 'The next 30 years in wool' in which she discussed sustainable fashion and how wearing wool can make a difference for the planet.



A VOV promotional window display and the opening shot from the VOV sustainability video.

ILAIL

ILAIL is a premium knitwear brand for contemporary women seeking comfort and style. This season the brand expanded its range of premium wool knitwear to include crewneck cardigans and knitted jumpers made from 100% Australian Merino wool. For the first time, the brand has also introduced a children's line, using premium Merino wool. As part of the promotion, influencer @suesasha (who has 250,000 followers on Instagram) shared memorable moments of her two daughters wearing Merino wool garments.



ILAIL's in-store promotional displays and a popular Instagram post of influencer @suesasha and her children wearing ILAIL's new Merino wool range.

WOOLMARK MARRIES UP MIZUNO WITH MERINO

Japanese sporting goods giant Mizuno has expanded its use of Merino wool in its base-layer ranges in a series of initiatives during the past year, thanks to R&D and marketing support from Woolmark.



The 365 All-in-One Merino wool blend T-shirt was a brand new product from Mizuno.

Established in Japan in 1906, Mizuno is the second largest sports brand in Japan. It has grown into a major global manufacturer and retailer of sporting apparel, footwear and equipment with annual sales worth approximately A\$2.25 billion and a 23% year-over-year growth last year.

AWI Regional Manager Japan & Korea, Samuel Cockedeey says Woolmark last year worked with Mizuno to introduce Merino wool into its popular Breath Thermo performance base-layer range and has since cemented the relationship to ensure the success of two new Merino wool ranges launched by Mizuno.

"By collaborating on both R&D and marketing with Mizuno, we have been able to build the company's awareness of Merino wool as a performance fibre, which has resulted in the development of new Merino wool-rich base-layer products launched in the Japanese market," said Samuel.

"This is part of Woolmark's strategy in Japan to invest in growth with leading sports and outdoors brands by developing multi-year collaborations with a focus on volume. This helps ensure the success of the brands' newly launched wool products and secures increases in their Merino wool usage in the long term, which benefits Australian woolgrowers."

Merino introduced into Breath Thermo range

In the first of three initiatives, Mizuno for the first time included Merino wool in its popular Breath Thermo performance base-layer range

last year. Up until then, Breath Thermo had been made entirely from synthetic fibres. However, to celebrate the 30th anniversary of Breath Thermo, Mizuno introduced Merino wool into its range of heavy-weight tops and bottoms for men and women, positioning them as the premium line of the Breath Thermo range.

"The introduction of wool into the Breath Thermo fabric was a perfect way to elevate and add premium value to this popular range that everyone knows and loves. Merino wool is the fibre that brings out the best in Breath Thermo," said Ogawa Akira, Senior Advisor at Mizuno.

21,000 pieces of the Woolmark-certified products, containing 60% Merino wool, were launched in September 2023 for Japan's autumn/winter season.

Mizuno introduces new Merino product

The very positive reception to the new Breath Thermo range paved the way for the collaborative development of a completely new product from Mizuno: the 365 All-in-One Merino wool blend T-shirt, which was launched in May 2024. The 50% Merino wool fabric is a double knitted fabric with jersey on one side and a mesh on the other, providing top performance with an everyday look.

The T shirt, available for men and women in three styles, is intended to be an all-season, trusty staple in busy people's wardrobes. It is the first product worldwide to achieve dual certification and labelling from Woolmark for Total Easy Care and Merino Perform.



Mizuno's mid-weight Breath Thermo base-layers.

Mizuno expands its Breath Thermo range

In the third and most recent initiative, and as a result of the continuing R&D and marketing collaboration between Mizuno and Woolmark, the Japanese brand in October released a mid-weight Breath Thermo product range of Woolmark-certified tops and bottoms for men and women, as well as continuing its heavy-weight range, for the 2024/25 autumn/winter season in Japan.

Woolmark is supporting Mizuno in a promotion of the products during a five-month digital and social media campaign.

There are a total of 28,000 pieces of Woolmark-certified, premium wool garments (Breath Thermo and 365 All-in-One) available to purchase this season, which is a 33% increase from last year. Sales are going well.

Woolmark is currently discussing more global projects and further product categories with Mizuno.

"Thanks to Woolmark, our development and marketing teams have learnt more about Merino wool and how to develop products with it and how to promote it. The collaboration has been most beneficial for us," said Ogawa Akira.

More information:

<https://jpn.mizuno.com/breaththermo/wool>

<https://jpn.mizuno.com/underwear/merinowool/365all>

SETTING UP BUSINESS OPPORTUNITIES FOR WOOL

At the recent Japan Creation trade show, Woolmark set up business meetings between Japanese and South Korean textile trade suppliers to encourage new commercial opportunities for Australian wool.

In November, Woolmark exhibited at Japan Creation, the popular textile trade show in Tokyo hosted by Japan Fashion Week Organisation, to engage with and inspire leading textile manufacturers, brands and retailers in the region to include wool in their collections.

At the Woolmark booth, the company promoted the natural and performance benefits of Australian wool, and showcased a wide collection of the latest Merino wool products. The latest edition of Woolmark's The Wool Lab sourcing guide to quality wool yarns and fabrics was also available for the thousands of trade show attendees to explore.



The Woolmark booth at Japan Creation.

Connecting the supply chain

In addition to having an exhibition booth at the trade show, Woolmark also arranged special meetings between Japanese and South Korean suppliers of wool yarn, fabric and apparel.

Both countries are important markets for Australian wool and have textile industries that produce high-quality wool products. Geographically, the two East Asian countries are located very close to each other, the shortest distance between Japan and the Korean Peninsula being only about 50 km. This close proximity makes transport and trade between the countries very easy and also minimises carbon footprints.

At the special Woolmark-facilitated meetings at Japan Creation, six large Korean suppliers keen on exploring overseas markets such as Japan were each introduced to 10 Japanese textile companies and trading houses.

AWI Regional Manager Japan & Korea, Samuel Cockedeey, says the meetings helped connect some Woolmark's key trade partners in the region and thereby build the demand for wool.



Making connections at the Japanese-Korean supplier meetings.

"We set up the meetings to initiate business conversations between some of our most important Korean and Japanese trade partners and create new opportunities for wool consumption," Samuel said.

"The sessions were successful in bringing the suppliers' latest commercially available wool offerings to the forefront of the trade buyers' minds, at a time when they were considering fibre and fabric choices for their future collections and product ranges.

"Ultimately, the initiative was all about helping to connect and support the supply chain, and drive new demand for wool, which will benefit Australian woolgrowers."

Successful meetings

Feedback from the Korean suppliers was that they found the sessions very useful for promoting their wool products to the Japanese companies and trading houses:

Daekwang Textiles: "We are focusing on expanding our sales beyond our domestic market, so the meetings were a good opportunity for us. It was great to be able to consult with 10 proven buyers from Japan."

Aztech WB: "It was good to see the interest in our products from the Japanese trading houses and helpful to set up our direction for future business. It was good to understand more about the needs of the Japanese market."

Yejin F&G: "It was a really good opportunity to expand our business, and a good experience to share market trends not only in Japan and Korea but also global trends."

Grubig: "It was very useful to hear the opinions of the Japanese buyers to enable us to develop new products, especially as they are approved by Woolmark."

The Japanese contingent was also very appreciative of Woolmark setting up the meetings:

San Marino: "Overall, it was great to participate in the sessions as there were lots of quality wool materials that I had never seen before."

Toyoshima: "It was a great opportunity to meet the six Korean suppliers at the one event, which made it very productive timewise while at the trade show."

Wool sourcing guides to Japan and South Korea

Woolmark has recently published two new sourcing guides for Japan and South Korea that highlight key information and contact details of the best spinners, weavers and knitters of Australian wool in these two countries.

These unique resources will help trade buyers, brands and designers from across the world to connect with the two countries' suppliers, thereby helping to increase the demand for Australian wool.

Access the guides at www.woolmark.com/industry/source-wool.

Also available are sourcing guides for the Indian subcontinent and Vietnam.

BIELLA MASTERS LEARN ABOUT AUSSIE WOOL

Six Italian postgraduate students on a global study tour recently visited Australia to increase their knowledge of the Australian wool industry and how the fibre is produced.



The six Italian postgraduate students on their visit to Australia: *Giorgia Bragagnolo, Morena Chiriano, Lara Lazzaroni, Illaria Lovera, Clara Marini and Andrea Moro.*

AWI supported the visit in September by the six Italian students on the Biella Master Noble Fibre postgraduate course to help them learn more about the production and natural attributes of Merino wool in Australia.

During their year-long course, which is based in Biella, the students examine the entire textile supply chain, from the raw materials through to the final product. In addition to their studies in Italy, the students undertake an overseas tour, including to Australia.

Woolmark has supported visits to Australia by Biella Master students since 1989 which demonstrates the long-standing relationship between the two organisations.

This year, the students began their trip by visiting the Sportscraft office in Sydney to meet with the brand's Head of Design and learn about the retailing of wool apparel. Their stay in Sydney also included a workshop at the AWI office where they learnt more about Australian wool, marketing, Woolmark licensing and traceability, sustainability, wool innovations and The Wool Lab sourcing guide.

The students then visited the wool auctions at Yennora, before travelling to Goulburn to see AWH's wool handling facility. They then visited several wool-growing properties in the Southern Tablelands of NSW, Thalabah Merino Stud at Laggan and Hillcrest Park Superfine Merino Stud at Bigga, where the students were shown shearing, fleeces, stud sheep as well as lambing ewes.



The Italian postgraduate students at Thalabah Merino Stud at Laggan, NSW

"The thing I like most about wool is its versatility; it's a fibre which fits well into every daily situation. It would be great if everyone started dressing in wool."

Andrea Moro, Biella Master student

The students said they found the tour very informative, and they came out of the experience with a very positive appreciation for Australian wool.

"My knowledge of wool increased a lot during this trip. Having the opportunity to see the very beginning of the supply chain closed the loop I started 10 months ago in Biella," said Andrea Moro who is a graduate in Economics & Management of Government at Bocconi University in Milan.

"The most impressive thing I learnt was about the tireless work farmers do from a genetics perspective to produce the desired micron, and the farmers' many strategic decisions regarding farm management and market positioning of their fibre. Before coming to Australia I had a much simpler, and simplistic, view of farms, but I now appreciate the important business aspect to farming.

"What I found most interesting about the tour was the functioning of the wool market. My background is economics and therefore to me it was very interesting to find out how Australian wool is traded, largely via an auction system. Attending the wool auction blew my mind – it was one of the most exciting things I've seen in my life.

"The part of the trip I most enjoyed was the time on the farms. I come from a small town next to the mountains and I'm a nature-lover, so I feel at ease in this environment. Besides the amazing landscapes, I enjoyed the warm hospitality of the people who hosted us as well as having the opportunity to compare what I had just seen in New Zealand the week before, concerning both the land and livestock management and the managerial decisions to run a farm."



NEW WOOL SOLUTIONS FOR AUTO & OFF-ROAD SPORTS

The seventh and latest edition of AWI's Woolmark Performance Challenge was launched last month. This year's competition challenges tertiary students from across the world to develop innovative new product applications for Merino wool within the auto and off-road sports market.



The 2025 Woolmark Performance Challenge asks tertiary students from across the world to create innovative, high-performance solutions tailored to withstand nature's harshest elements across three distinct sports: motocross, auto racing, and off-road cycling.

Since its launch in 2018, the Woolmark Performance Challenge has cemented its place as the world's leading ideas platform for the sports and performance-wear market, harnessing ground-breaking design with the unique natural properties of Australian Merino wool.

Unlike other competitions which are based solely on design aesthetics, the Woolmark Performance Challenge asks students to harness the power of engineering and garment technology, as well as nature, to innovate and give athletes advanced apparel solutions. The competition is open to students studying a wide range of specialisms.

During the past six editions of the competition, the program has involved nearly 7,000 tertiary students from more than 325 universities in 30 countries across the world, thereby giving AWI and its partners access to a global pool of world class inventive minds.

"By developing new innovations using Merino wool in the activewear sector, and promoting Merino wool as a technical fibre, the Woolmark Performance Challenge helps increase the demand for Australian wool."

Kelly Mcavoy, AWI Program Manager - Education Extension

AWI partners with sports and outdoor industry brands to amplify the messages about the competition and the performance benefits of Merino wool – and also to further embed appreciation for the fibre within the partner companies themselves.

Past program partners have been leading sportswear company **adidas** (twice), Norwegian-based outdoor apparel company **Helly Hansen**, Swiss running shoe and apparel brand **On**, Italian mountain equipment brand **SALEWA**, French outdoor and sporting goods company **Salomon**, and Italian America's Cup sailing team **Luna Rossa Prada Pirelli**.

For the 2025 competition, the partner is **Alpinestars**, the Italian world-leading manufacturer of apparel and equipment for motor and other action sports.

"We are pleased to embark on this partnership between Alpinestars and The Woolmark Company. By utilising our shared commitment to innovation, our aim is to combine our collective expertise from our fields of operation in order to merge sustainability and performance in the wide-ranging technical products we develop."

Chris Hillard, Alpinestars, Head of Media & Communications

A key component of the Woolmark Performance Challenge is to educate students about Merino wool. As they progress through the duration of the competition, the students become educated about the attributes and benefits of the fibre by utilising the Woolmark Learning Centre and educational webinars. This educational element of the competition not only arms the students with information to assist in their competition entry, but will also encourage and inspire them to think about wool in their future careers.

The 2025 competition brief

For their submission, students in the 2025 Woolmark Performance Challenge are required to choose a brief for one of three sports and their related challenge:

1. **Motocross (MX) / air:** Channel the wool fibre's natural breathability to design gear to enhance performance and comfort in high-intensity motocross environments.
2. **Auto racing / fire:** Harness the wool fibre's inherent flame-resistant properties to develop advanced safety gear for auto racing.
3. **Off-road cycling / water:** Capitalise on the wool fibre's moisture management and temperature regulating properties to create high-performance cycling apparel.

All entries to the competition must use a minimum of 50% Merino wool within their product composition, paired only with natural or recycled fibres. Entries must be submitted by 30 May 2025.

A three-month paid internship at Alpinestars in Asolo, Italy, will be awarded to the entrant that most impressively meets one of the three briefs set by Alpinestars. Up to five other selected participants will also be chosen for their innovative concepts to collaborate with Woolmark's technical experts and supply chain partners to further develop their design.

More information: www.woolmarkchallenge.com



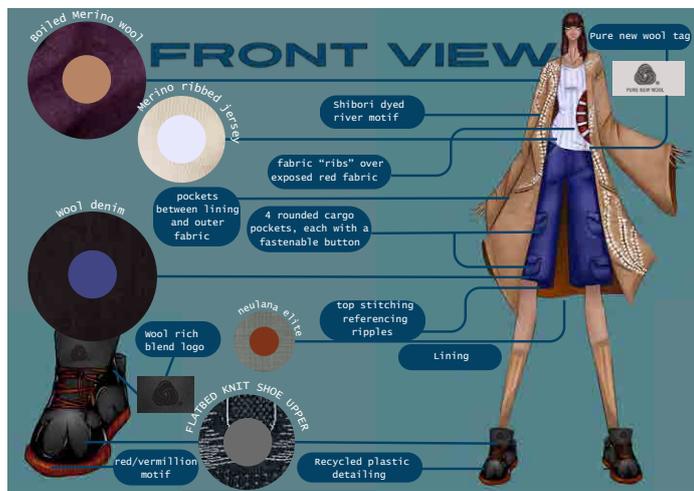
WOOL4SCHOOL INSPIRES AND EDUCATES STUDENTS

Wool4School is an annual student competition that offers a complete design experience in the classroom while introducing a new generation of students to the versatility of Australian wool.

2024 Wool4School Australia competition winners

Aspiring designer category (Year 12)

Solomon Raymond, St Columba's Catholic College, Springwood, NSW



"It's so amazing to achieve first place. I've been doing this competition for about three years now and I feel like it's really had a big impact on my life," Solomon said.

"Each piece of the collection demonstrates wool's high level of diversity, from footwear to stretch knit top."

Mid designer category (Years 9-10)

Penelope Robson, Penrith Anglican College, NSW

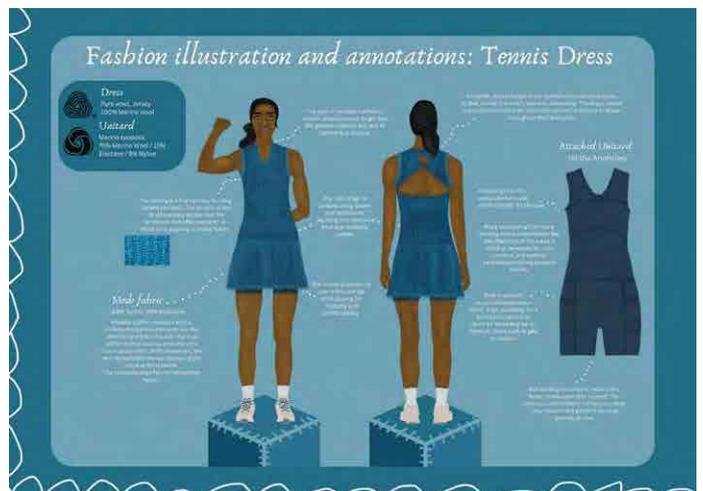


"The dress in my design is made out of 100% wool. I chose this fabric in order to increase its comfort as well as the breathability of my design. I also used wool for its flexibility and its soft touch against the skin," Penelope said.

"My design is made out of Merino wool and the tiniest bit of silk; wool is biodegradable and environmentally friendly."

Senior designer category (Year 11)

Lola Refardt, Mount St. Joseph Girls' College, Altona, Vic

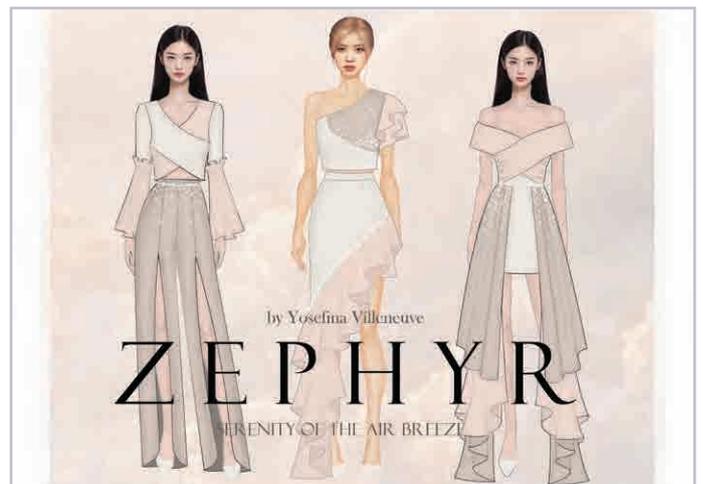


"I was inspired to create tennis outfits after seeing Andy Murray's Merino tennis set at Wimbledon a couple of years ago," Lola said.

"Although synthetic fibres are currently dominating the production of athleisure, by using 75% Merino wool in my designs I aimed to highlight the versatility of Merino wool and its potential in the field."

Junior designer category (Years 7-8)

Yosefina Martanto, home school, SA



"I used the high-quality yet sustainable Merino wool blend fabric for the designs, for it is comfortable just as the breeze," Yosefina said.

"I express my willingness to campaign for the use of more natural fibres for fabric, such as the usage of Merino wool blend fabric – to lead to a better environment, to enhance biodegradable materials and elevate fashion sustainability further."

EDUCATION FOR LEADING BRANDS

Wool4School is an annual design competition that has been run by AWI in Australia since 2011 and has now involved more than 150,000 high school students worldwide.

The competition not only helps the students learn the fundamentals of design, it also gets the budding designers exploring the benefits and versatility of Merino wool fabrics as part of a creative design of their own. Teaching these young designers and consumers about Merino wool will result in them being inclined to choose Australian wool as they progress into adulthood and embark on their careers.

On the back of the success of Wool4School in Australia, AWI also currently runs the student design competition in the key markets of the United Kingdom and Italy.

Each year, Wool4School presents a brief with a new theme to guide the students' designs and provide them with inspiration. For the 2024 competition, students were asked to create a design made from wool, taking inspiration from the earth's natural elements: earth, water, fire and air. See the full winning entries at www.wool4school.com.

2025 Wool4School competition in Australia now open

Registrations are now open for the Australian edition of the 2025 Wool4School competition. Students not only have the option of creating a fashion design, they can alternatively create a design for a different application such as accessories or interior design.

For this year's competition, students are asked to create a design made from at least 70% Merino wool, taking inspiration from the world of botanicals. They are invited to explore the lush diversity of plant life and draw on nature's artistry to create plant-inspired wool designs: think of prints, embroidery, and decorative crafts and techniques that reflect the intricate beauty of nature.

The competition closes on 17 July 2025, with winners to be announced on 28 August 2025. There are a host of amazing prizes on offer.

- **Woolgrowers and parents:** Contact your local high school and encourage them to get involved in the Wool4School program. Information for schools and teachers is available at www.wool4school.com
- **Year 7-12 students:** Learn more about the exciting competition and prizes at www.wool4school.com.

Woolmark recently held a successful workshop for Australian and New Zealand sports and wellness brands, to upskill their knowledge of Merino wool and thereby help increase use of the fibre in their collections.

Following the successful running of two previous editions of the Incubation Lab workshop during the past year, Woolmark held another edition of the workshop in Sydney in October, this one specifically tailored for Australian and New Zealand sports and wellness brands.

The Incubation Lab workshop aims to educate and inspire designers and creatives about the possibilities and versatility of Australian Merino wool. Through a comprehensive program featuring educational sessions and insights from industry leaders, participants gain valuable market knowledge and resources to enhance their design capabilities with wool.

"We developed the Incubation Labs to formulate community support for wool amongst designers and brands and to help them identify gaps in the supply chain," said Clementine Hurley, Woolmark Business Development Manager – Fashion and Product for Australia and New Zealand.

"The initiative cements Woolmark's commitment to nurturing emerging and recognised talent and propelling the future of the textile and fashion industry in the region with a focus on wool."

Attracting a diverse group of participants from local sporting and wellness brands, the workshop in October covered key topics including on-farm sustainability practices, the thermal comfort benefits of wool in outdoor 'stop-go' sporting activities, innovation in wool performance products, sourcing wool fabrics, marketing wool as a fibre, and consumer insights.

The workshop enabled attendees to engage with a wide range of experts from Woolmark. In addition, Peter Wu and Jason Yu of Chinese wool fabric manufacturer Danmao Textiles via video link provided insights into the importance of wool for Danmao's business and highlighted the innovative wool fabrics that the company produces for global sports and outdoor markets.

The Incubation Lab attendees:
(who are pictured left to right below)

- Steve Philpott and Melanie Dumble of **Bond-eye** (swimwear)
- Sarah Forde and Leigh Gallagher of **Modibodi** (underwear and swimwear)
- Matt Brand and Stacey Doyle of **Le Bent** (outdoor)
- Ryan Paxton of **Attaquer** (cycling)
- Rex Zhang and Sofia Al Lahham of **Paire** (leisure and lifestyle)
- Nicole Carusi and Cara Plant of **XTM** (snow and outdoor)
- Milan Thompson and Alban Piot of **Rip Curl** (surfwear)
- Rachel Phillips of **Asics** (running and other sports)
- Mitchell Lyne of **Cover Ridge** (base layer)
- Carl Moriarty of **MAAP** (cycling)
- Omar Varts of **Cover Ridge** (base layer)
- Ashlea Warren and Georgia Saville of **The Upside** (sports and leisure)



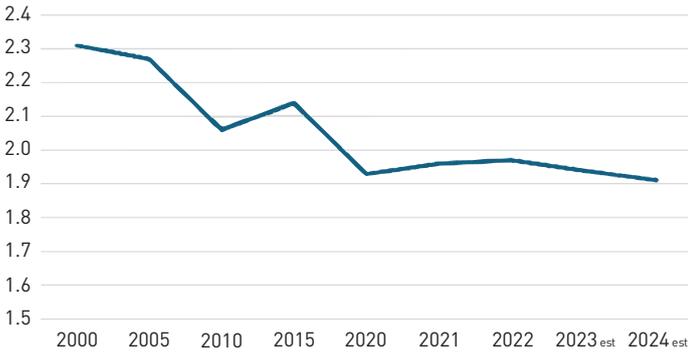
Attendees from sports and wellness brand's at the Incubation Lab workshop held in October in Sydney.



MARKET INTELLIGENCE REPORT

Global wool production

Figure 1: Global wool production in billion kg greasy



There is predicted to be a decline in wool production not just in Australia but also in many of the other significant wool producing countries including South Africa, Argentina, New Zealand and the UK. Global wool production is forecast to decline by 2% in the coming year, with Merino wool production the most affected.

The low prices that crossbred wool has attracted over many years has led to innovation in non-traditional markets interested in using this wool type. Also, crossbred wool has begun to replace synthetics in many areas of the interiors market. In particular, bedding and carpet manufacturers are reverting to 100% wool product as the price for nylon continues to be less affordable and as consumers look for value and perceived natural benefits.

The volume of wool used in apparel has continued to fall below the volume of wool used in interior textiles. Farmers globally are increasingly choosing production systems with dual-purpose (wool plus meat) and prime lamb sheep breeds, as well as shedding breeds to completely avoid harvesting costs. This is particularly the case in Australia and New Zealand where harvesting costs are much more expensive in than other wool producing nations.

For the 2023/24 year, the gap between apparel wool and interiors wool is getting higher, with interior wool production now about 55% of global wool production while apparel wool production at about 45%. For a few decades prior to 2007, the split favoured apparel over interiors and homewares.

Figure 2: Global wool production markets 2023/24

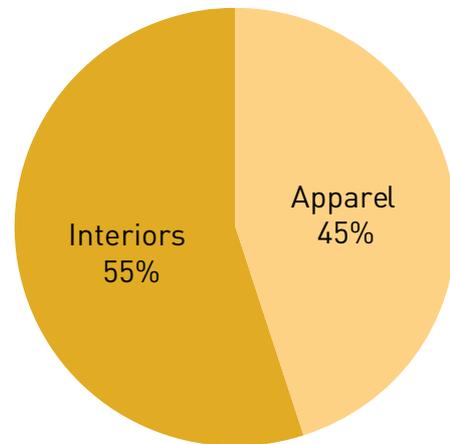
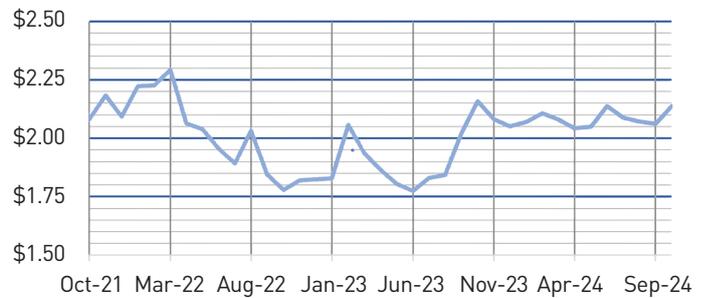


Figure 3: Raw wool price guide for Interiors (USD/kg clean)



Alternative fibres update

The past 12 months has seen the price of most of the extruded synthetic fibres and cotton alternatives to wool fall below the crossbred wool values.

Since the 2020 global pandemic, crossbred wools of 26 to 30 micron had been sitting underneath the values being paid for cotton, acrylic and polyester. Despite better gains for synthetics during the past six months, crossbred types have done enough cumulatively over the past year to stay above the value of synthetics and cotton as crossbred wool regains favour in the textile business.

Merino wool values remain far more valuable and our medium Merino wool values are around the 3.5 to 4 times the price of acrylic, polyester and cotton, although the price gaps have narrowed in the past few decades.

The data since January 2024 shows values for synthetics slightly lower at around 1% less, while the two natural fibres wool and cotton are trending flat to down. Cotton has been particularly out of favour; its price having fallen 15.9% lower in just six months.

Figure 4: Fibre prices in US dollars per tonne, November 2024



Australian wool production by volume: July to October 2024

Figure 5: AWTA Key Test Data by state

	2023/24 to end of Oct	2024/25 to end of Oct	Tonnes difference	% difference	% of total Australia
NSW	44,085	41,696	-2,389	-5.42%	41.9%
VIC	20,627	20,242	-385	-1.87%	20.4%
WA	18,196	15,319	-2,877	-15.81%	15.4%
SA	16,383	14,604	-1,779	-10.86%	14.7%
QLD	3,939	3,968	29	0.74%	4.0%
TAS	4,478	3,596	-882	-19.70%	3.6%
TOTAL	107,708	99,425	-8,283	-7.69%	100%

Australian Wool Testing Authority (AWTA) has tested 99.4 mkg (million kilograms) for the first third of the 2024/25 season (July to October). This is 7.7% down on last year at the same time.

All states except Queensland have seen decreases. The biggest losses of production have been in drought-affected Tasmania which is down 19.7% compared to the end of October last year, and Western Australia which is down 15.8% compared to the end of October last year although it is an improvement on the 22.4% less that was recorded after last month's AWTA report.

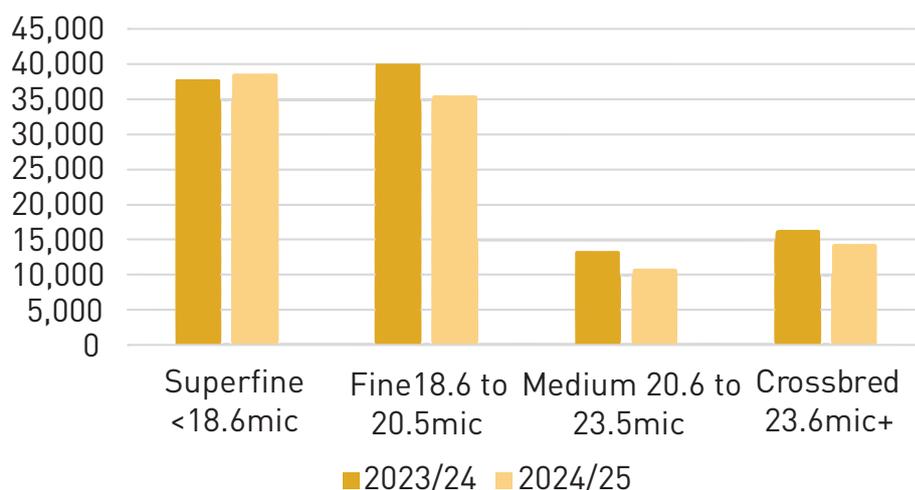
The two leading wool production states of NSW and Victoria (64.7% of national production) show losses that are restricted well below the forecast national fall in production for the year of 10.1%, helping hold up overall Australian volumes.

Australian wool production by micron category: July to October 2024

The first four months of testing by AWTA has produced some quite unexpected results. The only category to show increased production compared to the same period last year is the superfine Merino sector of 18.5 micron and finer, which has grown by 2.3% year on year by volume. Dry conditions may be a prime factor.

All other sectors have tested weights well in excess of the average national loss of 7.7%. Fine wools are 11.4% lower, medium wools down 19% and perhaps the most unexpected is the broadest and crossbred area of broader than 23.5micron which is 12.2% down compared to the same stage of last season.

Figure 6: Season to season by micron category for first four months of each season



AWI MARKET INTELLIGENCE FOR WOOLGROWERS

In addition to this Market Intelligence Report provided each quarter in *Beyond the Bale*, AWI provides several other regular market intelligence services that are available FREE to woolgrowers, including:

Weekly Price Reports (during sale weeks), which include weekly EMI and WMI price movements, currency movements, the number of bales offered and sold, as well as weekly commentary from AWI on the markets.

Monthly Market Intelligence Reports that provide insights into economic, finance and trade issues affecting global demand for wool, and what this means for the Australian wool industry.

Graphical display of market information on Wool.com, including:

- **Micron price** – you can select from a full range of microns, sold in Sydney, Melbourne and Fremantle.
- **Market Indicator** – you can select to display AUD, USD, CNY or EUR.
- **Offering** – displays bales offered and bales sold.
- **Currency movements** – you can select to display AUD/USD, AUD/CNY or AUD/EUR.
- **Forecast of bales sold** – displays previous season, current season, current week and forecast.

For the first four categories above, you can select to display data from 3 months to 3 years ago.

Australian Wool Production Forecasting Committee reports

that provide detailed estimates of sheep numbers, sheep shorn, average cut per head and wool production. The reports are produced three times each year.

Sheep Producer Intentions Survey which are conducted three times each year jointly with MLA. The survey results are used to create regional, state and national wool and sheepmeat industry data which enables the industry to better manage the supply chain and meet producer and customer expectations.

More information: View the above market intelligence information at www.wool.com/marketintel or subscribe at www.wool.com/subscribe to receive the information by email and/or SMS. You can unsubscribe from the service at any time.



PHOTO: Maksym Belchenko

READERS' PHOTOS!

Have you got any interesting photos that you'd like to share with other readers of Beyond the Bale? If so, please email the image and a brief description to the editor of Beyond the Bale Richard Smith at richard.smith@wool.com, or you can tag us #beyondthebale on Instagram.



Fleece as white as snow

James and Dianne Cowlshaw of 'Wilga Vale' at Yelarbon in the Goondiwindi region of Queensland sent in this lovely photo captioning it "Grandma had a little lamb, who's fleece was white as snow".

90th birthday treat

When he was a young man, Russell Walton of Dalby in Queensland used to shear 160 sheep a day. For his 90th birthday in September, he set himself a challenge to see if he could still shear just one sheep. In front of a crowd of friends and relatives at his birthday party, Russell expertly and confidently set about his task and completed it with a huge smile on his face. Well done, Russ! The photo was taken by Ange Stirling of Ange Stirling Photography based in Dalby.



Attention to detail

AWI shearer trainer Kevin Gellatly full focussed at a five-day novice wool harvesting course held at the Teakle family's property at Northampton in the Mid West region of Western Australia. It was an awesome week with everyone working hard and learning heaps, all with a great attitude.



Birds eye view

Woolgrower Ben Creek sent in this great drone shot of his set-up at crutching time at Boyup Brook in the south-west of Western Australia.



What's shearing without bales and kids?

Leanne Ohlmeyer from Waikerie in the Riverland of South Australia sent in this photo from shearing at 'Moya' in September. She says she just managed to keep her boys still enough for a photo before they began their gymnastics on the wool bales again.

Focussing on the job

Year 11 students from the WA College of Agriculture Harvey going through their paces in October learning from AWI trainers about wool, shearing, wool handling, team ethics and so much more.

The story of my suit

Hugh Ellis of Eugowra in the Central West of NSW sent in a remarkable story of how he lost almost everything in the terrible floods that swamped the town two years ago:

On the 14 November 2022, the town and region experienced a catastrophic flood. Houses were washed off their foundations, families and pets climbed onto the roofs of their houses, eighty-year-olds sat on chairs on top of their kitchen tables up to their necks in water. Young families with babies and toddlers were in trees and on the back of trucks. Sadly two much-loved locals died that day but it was a miracle more weren't lost. If the inland tsunami had come at night, the death toll could have soared. It resulted in the largest helicopter rescue in Australia's history to date.

My wife Lyn and I had recently sold our farm and bought what used to be the Eugowra Golf Club to renovate and turn it into our home, a good retirement project. So this we did, living in chaos for seven months; we finally finished and had our builders' cut out party on the 11th November. It had been a hard slog but we were a big happy family, all the various tradies proud of their achievements.

Three days later, we virtually had nothing. The flood smashed nearly every window, tore most doors off their hinges and ripped our beautifully polished floors out of the ground – piers included. The water was gutter high and we survived by scrambling up an attic ladder which had been installed during the renovations, into the ceiling cavity. Eventually we bashed our way out onto the roof and were rescued by a helicopter. We lost 95% of our worldly possessions that day, including my woollen suit, which I had only worn three or four times. In the scheme of things this was an insignificant loss and I hadn't given it a thought.

However, some months after the clean-up, Lyn was mowing the lawn and noticed a pile of mud at the base of a tree. To her astonishment it was my suit, which it turned out had been originally found by our children snared on a boundary fence that had been torn out by the flood (strainer posts included) and ended up in a tangled mess in our neighbour's lucerne paddock. Lyn blasted it with the pressure cleaner and hung it over a pallet to dry. A friend then kindly took the suit to the dry cleaner and it



came back as a good as new and I have worn it several times since.

It may seem like a small, insignificant win but when it is the only piece of clothing you are left with, other than what you are wearing or have been given, it IS significant.

The suit is in great condition and I think it is an excellent advertisement for Australian Merino wool!

Shearwell Data

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