

AUSTRALIAN SUPERFINE WOOL GROWERS' ASSOCIATION INC.

ANNUAL 2020 - 2021

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LETTER FROM THE EDITOR

Last year I opened up with “another year has rolled past and as usual, much has occurred in the last twelve Months”. Well this last 12 Months has redefined much has happened; not all of it bad either. Firstly, there is far less of our Country that is now drought-affected, with many areas receiving significant rainfall. Unfortunately there are still some areas that are drought-affected and I think that we would all like to see these areas get wet and soon.

Greasy wool prices have retreated somewhat from the levels seen earlier in 2019 and right now, look rather volatile. The ongoing and unresolved trade dispute between the USA and China has not helped, nor has the COVID-19 pandemic. While the USA-China trade dispute could theoretically be solved rapidly, the longer-term effects of the COVID-19 pandemic are virtually unknown.

That COVID-19 will change the World is beyond question, but the big unknown is how this will manifest itself. Travel will undoubtedly be more difficult and areas of the global economy will take years to recover. There are murmurings about bringing manufacturing back to our shores and perhaps we might see a re-establishment of onshore wool processing; time will tell. On the up-side, there are several very promising candidate vaccines in trials and the speed at which these vaccines have been developed is unprecedented.

In the short-term though, the effect of the pandemic will be wide-ranging and severe. Many people will lose their lives and even more will have lingering after-effects from the virus. Companies are fighting for survival and some will fail. Employees are losing their jobs and economies everywhere are contracting. A crystal ball would be very useful as what the World will look like in 12 Months time is far from certain.

Overall, the news is not all doom and gloom. The time that consumers have been forced to spend in lockdown appears to have changed the attitudes of many consumers, who now want to move away from fast-fashion and artificial fibres and their appears to be a groundswell of change, especially in younger consumers, who are increasingly concerned about the environmental impact of their clothing and other choices. Segments of the industry have recognised this shift and are actively trying to assist this change.

The increasing recognition of wool as the ultimate next-to-skin fibre continues apace, as more and more elite athletes opt for wool base-layer and as more evidence of the advantages of wool in aiding sleep continues to come to light. The increasing appetite for wool as the go-to next-to-skin fibre should continue to increase over time. And as we



know, the best possible next-to-skin fibre is Superfine wool.

We also have an article in this edition which may have a significant impact on our thinking and more importantly, consumer thinking, on the carbon footprint of producing wool. While further work is needed, it may prove that appropriate management techniques could be applied to produce wool in a carbon-neutral, or even better, a carbon-negative environment. Most exciting news.

We have tried to maintain our momentum on our ongoing series of articles on “Superfine Women” and this Year, we have contributions from Lesleann Waters, from Edington Merinos, and Janet Bell, from Kashmir, Wee Jasper, giving us further insight into the array of roles that partners provide in our industry. I would like to thank both ladies for their articles.

I must thank a long list of people who have helped me with putting together this edition of our Annual. First and foremost, I thank Melissa Mulley, who has done all the leg-work, chasing up articles, reminding people of deadlines, coordinating with publishers, and assisting me in so many ways. I am certain that this edition would not have made it off the ground without her continual and expert assistance. Secondly, I would like to thank Lyndall Eeg, who has proof-read almost all of the articles you will read and has saved me enormous amounts of time with her support. Thirdly, I would like to thank Susan Rowbottom, who has yet

again, been supplying me with ideas for this edition. Fourthly, I would like to thank Simon Cameron, who assisted me with ordering the articles in way that we hope makes sense. I also need to thank Neil Carey who helped with the selection of our winner in the photographic competition and our cover photo. Finally, I would like to thank the remaining members of the Annual Committee for their contributions, that are not necessarily evident, but are very much appreciated.

As I will not be editing the ASWGA Annual next year, I must firstly thank John Ive for volunteering to take over and I sincerely wish him all the very best in this endeavour. I have found that editing the ASWGA Annual is time consuming, but a most rewarding activity, as you get a real insight into our members and our industry and that at the end of the process, thanks to the efforts of the entire Annual team, we end up with a publication our Association can be proud of.

I hope that all who read this will stay healthy and happy and that the World has become, at least in some way, a better place.

A handwritten signature in black ink, appearing to read 'J. W. Gill', written over a white background.

Dr J. W. Gill.

ASWGA PRESIDENT'S REPORT 2020

It is my pleasure to report on the 49th year of the Australian Superfine Wool Growers Association. My three years' term as your President has been enjoyable and demanding but the most important highlight has been the friendship of so many wonderful people around the world. The support and friendship from our wool-growing members and our Mill Members is very much appreciated.

Much of Australia has come out of drought although 70% of NSW is still drought-declared, the worst being the South East area of NSW which will now have to wait until Spring for some relief from hand feeding.

The past few years brought us improved wool and meat prices which had farmers very excited about the future, then Covid-19 arrived. The last six months of falling prices could be disastrous for Superfine Wool production and our industry. I sincerely hope all Woollen Mills and Superfine growers can keep operating, so this wonderful natural fibre survives.

All of our wool industry is standing still waiting for positive news on wool prices and Superfine wool production.

Those of us living in rural Australia are very fortunate and we as farmers are likewise lucky to be able to choose where we live although sometimes we may feel a little isolated.

During my three years as your President I have endeavoured to liaise between all our members via email or mail on all activities from around the world including Australia when that information affects our members and other Superfine wool growers.

New Mill Member

I welcome NIKKE of Japan which has signed as a Mill Member with ASWGA this year. The Presentation will be to Mr Yoshirou Kamamura (Director and Managing Executive Officer) and Akira (Ashley) Okada (General Manager, Purchasing Department).

The continued support of Mill members encourages growers to keep producing Superfine Wool.

ASWGA Fleece Competition

Unfortunately, this year due to Covid-19 we had to cancel our Annual Fleece Presentation Seminar. We still ran our fleece competition - congratulations to all winners. The Champion fleece was entered by David & Angie Waters of Tarrangower in the New England Region. We had some beautiful fleeces entered, so



thank you to all who entered. We hope to hold the 2021 presentations in Mudgee in May 2021.

Zegna Competition

Congratulations to all winners and entrants - there are certainly some great elite wools still produced here in Australia. Wool Trophy winners were Allan and Caroline Phillips of "Glen Stuart" with second placing to Simon and Ann-Louise Cameron of "Kingston" - both from Tasmania. Third place was to Ed Hundy of "Windradeen" Pyramul in NSW. The Vellus Aureum was won for the sixth time in seven years, by David and Susan Rowbottom. A really magnificent achievement.

I sincerely thank the Zegna family for their continued support of ASWGA with their Fleece and Wool trophy competitions and also their support of ASWGA Members with their drought-proofing program which has enabled some fortunate farmers to improve their farms for possible future droughts.

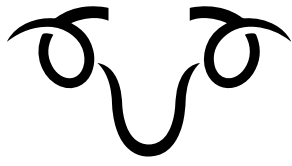
A massive thank you to all Woollen Mills and their representatives in Australia and overseas, your support is really appreciated. We endeavour to grow the best wool possible with our harsh climatic conditions for you to process.

The support of all Brokers and Sponsors of our Association is really appreciated. We at ASWGA strive to promote all Australian wool, especially Superfine. We need each other's business to keep moving forward.

A special thank you to all Councillors and Members who have worked with me over the past three years. Our Secretary, Melissa Mulley has made my three years a lot easier - thank you.

There are challenging times ahead for our industry. I sincerely hope that all who are producing Superfine wool continue with this wonderful fibre. There will be a big strain financially for some time to come for all involved in the Superfine industry.

Danny Picker
ASWGA President



Riverina Wool Testers

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ERMENEGILDO ZEGNA

Our actions today will shape
our tomorrow

Ermenegildo Zegna Group turns their hand and their supply chain towards front line support during COVID-19.

Together we can build a better tomorrow, rings loud and clear on the channels of the world's largest luxury menswear brand, Ermenegildo Zegna, as they re-envision how they can support the front line efforts during the time of the COVID-19 crisis.

"Let's look out for each other. Let's get through this together", said Gildo Zegna, CEO of Ermenegildo Zegna.

As part of the Zegna Group's efforts to aid in the fight against the global COVID-19 crisis, they completely turned out their factories and began manufacturing protective hospital gowns for medical staff, with the aim of producing 280,000 units. These efforts helped to provide urgently needed supplies to the Piedmont Region, in the north of Italy (250,000 units) and Canton Ticino, Switzerland (30,000 units), where they converted a portion of the Zegna plants to accommodate the suit production. The PPE suits are constructed with a non-woven fabric, produced by Pratrivero SpA in Biella, Italy.

In addition to the personal protection equipment, the Zegna family, together with the Group's top management pledged back

in March, personal donations to the Civil Protection in Italy, totaling 3 million Euros. This donation was in support of the nurses, doctors, scientists and volunteers across Italy who continue to work tirelessly to fight the pandemic.

"At Zegna we believe our actions today will shape our tomorrow. The pandemic we are all facing is a call for people around the world to take action. Each of us must do our part, in every way possible, to stop this global emergency", said Mr Zegna on an earlier occasion when speaking about the Group's continued efforts to support Italy and Europe through this dreadful time.

Over and above the corporate social responsibilities, which the group take very seriously, the family has also made direct financial contributions to provide several hospitals with ventilators and medical masks in advance of their own supplies being made ready.

The Zegna Group released a statement of appeal "The crisis we are all facing is a stark reminder that we must join together in every effort to combat the outbreak. Our thoughts are with all those affected by the coronavirus outbreak and we join in the appeal to people in affected areas to stay at home and remain safe".

At ASWGA, we represent the interests of Australia's Superfine woolgrowers, together with the world's leading processors and users of Superfine wool. The longstanding collaboration between the Ermenegildo Zegna Group and the Australian Superfine Wool Growers' Association is testimony to the unwavering shared commitment to maintaining and improving the quality of Superfine Australian wools and jointly promote the incredible skills and dedication of the best woolgrowers.

We are proud to be associated with Zegna and times like these remind us of the important collaborations worldwide which we must all value and uphold in order to create a better tomorrow.

One thing we can safely say from the back-end of 2019 to the early start of this new decade; things don't always go according to plan. As business owners, land owners and growers, we are constantly budgeting, forecasting and planning and we are learning how to adapt, let that go, re-envision and remodel.

Back in February, when we were still fighting the wild-bush fires of 2019, many of us were called upon to prove our agility and resilience.

Many wool properties reacted in ways that set a precedent for others (through these adverse



The Australian Superfine Wool Growers' Association would like to take this opportunity to congratulate Count Paolo Zegna on being awarded the Order of Australia Medal for significant service to Australia's bilateral relationship with Italy and to the Australian wool industry.

conditions) and companies which were able to respond and provide new, innovative programs and ways of working may help to mitigate the damaging effect of these kind of crises in the future.

The extremely deep and persistent phenomenon of the drought and bush fires which have hit Australia and its population so hard has inspired Zegna to make an additional contribution in 2020 to the woolgrowers who are determined to make personal investments into projects which can provide better supply and management of their water resources, fundamental to the life of their properties. The Zegna Group and the Zegna Foundation will contribute for approximately 50% of the investments presented and approved.

57 years ago, Ermenegildo Zegna - whose relationship with Australian wool dates at the beginning of the 20th century - established its inaugural "Ermenegildo Zegna Wool Trophy" to award and incentivise growers to improve the quality of Superfine Merino and it has consistently worked to celebrate the importance of this fibre and support growers in their quest to produce the best in the world.

This year, for the 57th edition of the prestigious program, Zegna - in collaboration with the Australian Superfine Wool Growers' Association, has once again honoured the

world's best woolgrowers by awarding the "Superfine Wool Trophy" and the "Vellus Aureum Trophy". The former is the oldest and most prestigious competition in the world of wool. The latter, the Ermenegildo Zegna's Vellus Aureum Trophy, was introduced in 2000 to reward the grower who has produced the finest of the finest Merino fleece in the world (omit space). In 2016, the winning fleece was recorded at an exceptional 9.9 microns, making it still an unbeaten world record.

All wool is judged by independent judges according to a strict set of criteria including fineness, style, strength, colour and evenness.

Below: Zegna's Social Media campaign during the COVID-19 pandemic



Below: The Zegna group started producing medical gowns to assist the strained hospital system during the pandemic



The 2020 Ermenegildo Zegna Superfine Wool Trophy was won by:
Allan and Carolyn Phillips (Glen Stuart - Deddington, Tasmania)

2nd Place	Simon and Ann Louise Cameron	Kingston - Conara, Tasmania
3rd Place	Ed Hundy	Windradeen - Mudgee - Pyramul, NSW
4th Place	David and Angie Waters	Tarrangower Merinos - Hillgrove, NSW
5th Place	David and Betty Cameron	Gowrie - Guyra, NSW
6th Place	Clive & Margaret Smith	Mulgowan - Amiens, QLD
7th Place	Rodney & Carol Westmore	Patterdale - Deddington, Tasmania
8th Place	Brett and Susan Picker	Hillcreston Heights - Bigga, NSW
9th Place	Robert Freeman	Rose Villa - Ross, Tasmania
10th Place	J Fletcher & Son	Kentucky Station - Kentucky, NSW



Allan & Carol Phillips - Winners of the Ermenegildo Zegna Superfine Wool trophy

"We've been honouring the best quality wool for over fifty years now and especially this year, the results of the Ermenegildo Zegna Wool trophies are excellent, not only in terms of number of farms participating in the competitions, but also in terms of the high quality achieved. This despite having very difficult weather conditions with persistent and tough drought which heavily impacted some areas of Australia", said Paolo Zegna, President of the Ermenegildo Zegna Group. "For this reason, on behalf of our Group, I would like to congratulate not only the winners, but all the farms involved in the competition. A deep personal thanks goes also to the Australian Superfine Wool Growers' Association for its great commitment to support the participation of its members in our competitions. A personal wish for a much better growing season goes to all those who continue to support our prizes and all woolgrowers in general. Finally, let's also hope the World will soon be rid of the dramatic effects of the coronavirus and will be able to restart again with a restored confidence, sense of responsibility and respect for the beauty of the environment and its products."

A positive in it all, may be a moment of pause, to listen to mother nature and learn. As Zegna says, "United, we will make it."



Paolo Zegna with David & Susan Rowbottom, winners of the Vellus Aureum competition for the sixth time

The winner of the 2020 Ermenegildo Zegna Vellus Aureum Trophy was:
David and Susan Rowbottom (Rowensville - St. Helens, VIC)

2nd Place	Danny and Megan Picker	Hillcreston Park - Bigga, NSW
3rd Place	Aaron and Rebecca Rowbottom	Myndarra - Orford, VIC
4th Place	David and Katherine Picker	Clearhill - Bigga, NSW
5th Place	Heather, Stephen and William Reid	Koorunga Farming - Koorunga, VIC

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ZEGNA DROUGHT INFRASTRUCTURE PROGRAM

Queenlee, NSW

The Carlon family at “Queenlee”, Uralla, couldn’t be more thankful to Ermenegildo Zegna for their generous offer to help fund sustainability projects for wool growers. Most have endured a long drought and also terrible bushfires in the summer of 2019/20. It’s been one of the worst droughts on record (the worst anyone has seen in six generations on “Queenlee”) and taken its toll physically, emotionally and financially.

For six months, like so many, we had bushfire smoke from the east and dust storms from the west, all while having to feed and water stock daily. At times the air quality was so poor, you were unable to see far in front of you for days on end. Paddocks turned to dust even as stock numbers were reduced, (photos we took are catalogued as desert pics by Apple albums) and to see ewes walk away from their baby lambs was heartbreaking - lambing percentages at an all-time low!

Although a lot of our grasses and hundreds of trees are dead, the rain started to fall Christmas Eve (best Christmas present ever) and the paddocks started greening. Native grasses are coming back quite well and dams have water in them again. We were able to get an oat crop in for Winter, which is growing well and have had 475 mm of rain since it started, compared to only 225 mm of rain for the whole of 2019. In time, we hope growers are able to rebuild / restock and get back on track again.

Our proposal was to install a solar mill, pipe and tank to water sheep in dry times. We had already cleaned out the majority of our dams to improve holding capacity and water quality as well as installed tanks and troughs. This new mill will help continue our drought-proofing program for future generations on “Queenlee”, with our two eldest sons working on the property at present.

Philip & Jennifer Carlon
Queenlee, NSW

Below: The Carlon’s with their new solar mill set up

Middle: Working being done at Queenlee on the new solar mill

Bottom: New tank for watering sheep during dry times



Hillcreston Heights, NSW

On behalf of our “Hillcreston Heights” family, we would like to thank the Zegna company for providing us with the opportunity to implement a water sustainability project that will aid in drought-proofing our property in the future.

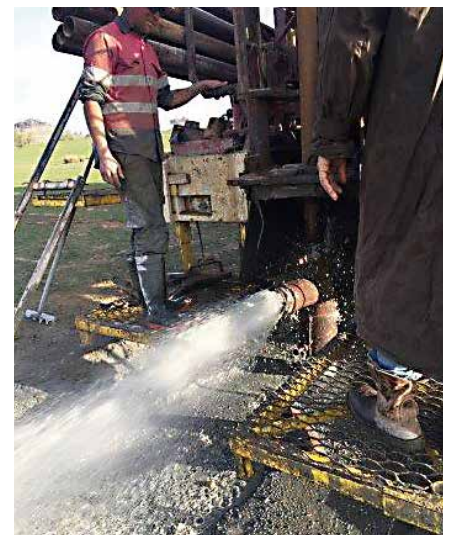
Zegna’s generous funding has enabled us to obtain a permanent water infrastructure giving us a bore that produces 19,000 litres an hour. This water supply will benefit our production of Superfine Wool for the Zegna Company for many years to come.

Mere words cannot express our gratitude and appreciation for their ongoing support of the Australian Superfine Wool Growers.

Brett & Sue Picker
Hillcreston Heights NSW

Below: New bore project at Hillcreston Heights to assist with future drought proofing

Bottom: New bore producing 19,000 litres an hour



Rockvale North, NSW

“Rockvale North” has just experienced the worst drought in recorded history. The drought has been unpredictable and over a long period of time. In 2019 Rockvale North received half of the lowest rainfall that Armidale had experienced in its recorded history.

Over the course of 2019 Rockvale North has undertaken substantial water upgrades to its infrastructure. The company had invested a significant amount into its infrastructure in the past however, the recent drought events have seen a significant shortage in the availability of water for stock. Over the duration of

2019 Rockvale North invested \$100,000 into improving its water resources. This came in the form of two major projects:

- Water reticulation system that connects spring water into troughs
- Overall increasing available water storage

Through these projects we have been able to double our water storage capacity and ultimately improve our overall sustainability into the future.

Rockvale North has had the privilege of working with Zegna for a number of years now and are very thankful for the investment that

they have made back into our business by funding such projects on our operation. This will better allow us to move into the future and continue to partner with them , supplying a product that meets their requirements.

Ben Boland & Rob McClenaghan
Rockvale North, NSW

Below: (Left) Major storage dam constructed in catchment area. Wall is 5m tall. Volume estimated to be 2.5 megalitres.

(Middle) A spring dam that maintained its full capacity throughout the entire drought while other dams dried up. We used this as a source for the supply of a gravity fed reticulated trough system.

(Right) Another example of dam being re-engineered



Tarrangower Merinos, NSW

After arguably the worst drought on record in the New England, water security was very high on our agenda, right at the same time Ermenegildo Zegna announced news of their water infrastructure support program.

We had begun to improve water security after the 2013/14 drought with the installation of solar pumps on two large dams which pumped to header tanks and gravity fed to numerous troughs. This secured supply around essential infrastructure such as woolshed and yards but was confined to one end of the property.

Our thoughts were always to expand the original stage, and with water at the forefront of our minds, we put together a plan to continue implementing water infrastructure across the majority of the property. Our plan included adding 11 troughs, 4 km of pipe, another header tank and increasing storage capacity by enlarging one 4ML dam to over 20ML.

With Zegna’s generous assistance, this plan

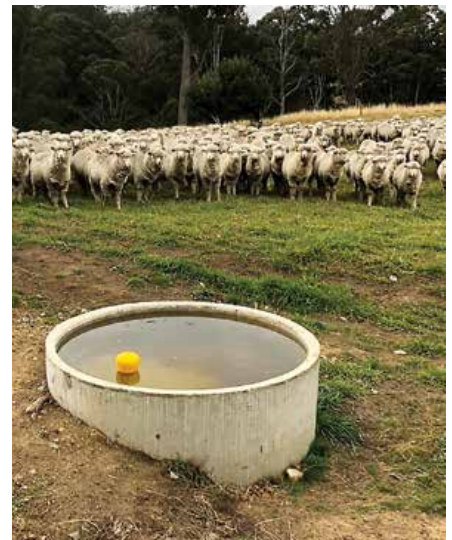
has become a reality. We were absolutely thrilled to hear that our application had been accepted, and we would like to sincerely thank Ermenegildo Zegna for their forethought, belief in us as woolgrowers and the financial support to implement our plans. In the current environment, after years of drought, this would not have been financially achievable. The support Zegna show Australian woolgrowers is truly remarkable.

Currently, we have installed all pipe, troughs and the header tank and will start work on the dam expansion very soon.

We believe that, with this support from Zegna, we will be able to supply high quality water to our livestock no matter what the seasons deliver in the future.

Dave and Angie Waters,
Tarrangower Merinos

*Below: 4km of pipe laid to fill troughs
Right: 1 of 11 completed troughs
Bottom right: Filling the new troughs*





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SCHNEIDER EVERYTHING ABOUT COVID

A Word from G. Schneider

Everything about COVID-19 has already been said. And whatever we may say today is probably wrong tomorrow. What is certain though, is that times are changing and fast. The World and our mills are timidly re-opening around the World because it's allowed, not because they genuinely have the demand for it.

In 2019, Italian fashion had a turnover exceeding US\$110 billion, which is over 5% of the country's national GDP. Textiles and apparel alone accounted for 60% of it, involved 50,000 different companies, directly employing roughly 500,000 people. Italy's wool industry is a fully vertically- integrated supply chain and last year, imported almost 80 million kilos between wool tops, yarns and fabrics for a total value exceeding 1 billion USD and 96% of it has been re-exported. However, it could be argued that wool market values have been supply -driven for some time and demand has been poor: weavers and spinners prior to COVID-19 have been announcing lower orders in the range of 10% to 30% compared to the previous year.

As a consequence, despite the great performance of the strongest fashion conglomerates, the scarcity of its supply, the terrible bushfires in Australia and all the efforts in introducing wool into casual wear, our products have not been easy to sell. The reason is mainly related to the very weak demand for classic menswear and the difficulty of compensating the volumes lost in suiting with new products. In other words, despite all our efforts, we must be very honest in saying that we have failed in promoting wool as a more sophisticated alternative to cotton and synthetic materials.

One reason might be its relative high price - the second is that we haven't been able to tell our beautiful story well enough to an ever-changing customer.

More than fifteen years ago, the cheapest Merino sweater of an important fashion brand cost \$450, which at the time was considered to be extremely high, if you considered the cost of the raw material. Today, their cheapest Merino sweater costs almost US\$1,000 which means that they've managed to increase their prices three times faster than the inflation rate, in spite of the fact that the margins of their Italian suppliers become so low that over 50% of knitters and weavers in Biella and Prato went out of business. On the other hand, retailers are also struggling - sales for multi-brand department stores are constantly declining and most of them were already in financial distress before the end of last year and online retailers are not doing much better and still operating at a loss.

Fashion is a broken system, extremely inefficient, which destroys everything it touches - from its suppliers to its customers, including as we finally understand, the environment.

Maybe now it's time to rewire it.

We are dealing with the biggest crisis since the last War - it is affecting our daily lives and making us anxious and uncertain about our future. Some venture even further in saying that never has humanity been faced with a such rapidly expanding and widely spread event.

But even before the Coronavirus disrupted financial markets, dismantled supply chains and crushed consumer demand, the industry leaders were not optimistic about 2020.

Today, fashion executives are focusing on crisis management and contingency planning. During the rest of the year, retailers will be forced to discount and clear their stocks and Brands will have to find new ways to regain value and bring back customers to their stores.

The world of bargain shopping, where each garment sold will be worn just a few times before ending up in the landfills, will face big challenges as shoppers' mindsets will hopefully change.

Out of every crisis comes the opportunity to be reborn and this new normal is giving our industry a chance to reset a system which is no longer working, re-focusing on its value chain and re-shaping its ethics by which their customers will judge them.

This Covid-19 emergency came with a profound anthropological shock as we have decided to place the human being in the foreground, putting aside the economy, the consumers and the financial institutions.

We have stopped half the planet, sacrificed economies and limited personal freedoms in order to save lives and this has never happened before in the whole human history. In just a couple of few weeks, the human being and the environment became our priorities and we've taken measures to contain the pandemic that we thought were impossible.

This new humanistic approach will also involve a stronger commitment to Climate Change which seemed very far away when it affected Africa and the Pacific, but now it has somehow reached us and woken us up. Pollution, economic crisis and viruses have no boundaries. The Amazon rainforest fires don't only interest Brazil and the same thing goes for the Arctic ice loss.

During the pandemic we've understood how vulnerable we are - we're rediscovered the fear of death, the fear of suffocating and as a consequence I'm sure that by end of this crisis, we'll pay more attention to the quality of the air we breathe.

Remember that fashion is a consumer-driven industry and is now reconsidering its role in society as its customers are becoming more aware of the side-effects on our planet of their compulsive shopping habits. Sustainability will

be employed as a way to regain consumers' trust and companies will introduce new tools and strategies to future-proof their business models.

One of main focuses for every industry, including ours, will be de-carbonisation and circularity. While the wool industry is very strong on circularity, as a wool garment is both recyclable and biodegradable, de-carbonisation will become a critical aspect which might challenge our industry as much as animal welfare activism.

Our sheep produce methane, which has a Global Warming Potential 25 times higher than that of CO₂ over 100 years. However, if you shorten the timeframe to twenty years, the Global Warming Potential (GWP) of methane is as high as 84 times that of CO₂, and that is what makes agriculture a strategic activity when tackling global warming.

Recently we've seen fashion brands start labelling carbon footprint like calories, but they are not the only ones taking action. Science-Based Targets Initiative is a project that in a few months has involved almost 900 of the largest Companies in the world. The Initiative's overall aim is to eliminate false claims and provide the framework to prove whatever impact each business practice or corporation is having in relation to the Sustainability Development Goals from the United Nations and their roles in tackling global greenhouse gas emissions.

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Fast Fashion vs Wool

Every year starts with seasonal sales - at the beginning of our winter you can find designers' sweaters and coats at heavily discounted prices as shops have to make room for the spring-summer collections, which is delivered in-store in January. In the meantime, the fashion shows reveal to us what we will be wearing the next season, making obsolete everything we've just bought. A few weeks later, spinners and weavers are presenting their collections of yarns and fabrics for the spring-summer collections which will be in-store after twelve months. And the same madness happens every six months, for the simple reason that the desire to purchase must be satisfied immediately.

We've all been confined to home for quite a while and very few of us have felt the urge to shop for clothes. This is a problem for many retailers who have been depending on

compulsive shoppers for a long time. Think about fast fashion chains that rely on regular visits, up to an average of forty times a year, to sustain their revenues. The hectic system described has never been our world - in this environment wool couldn't compete!

The world of wool is much slower and follows the rhythm of nature.

The future of the wool industry depends on our ability to increase our market share which has never been this low. This is something we've never managed to do. Back in 2000, we represented 2.5% of all the textiles fibres - today we are below 0.9%. To reverse this trend we must learn to get together and co-operate as each one of us, individually, is too small to drive any change. We must emerge as a sustainable, traceable, open and co-operative industry and solve issues like animal welfare, sustainability and de-carbonisation. And we must be quick, efficient and deliver what customers are looking for before someone else does. If we fail to do so, we will remain a bunch of commodity producers, manufacturers and merchants. That's why it's imperative we must become the change we wish to see in the world!

The wool business is a very traditional industry. Actually it's hard to think of any other industry that has changed so little over the last hundred years. We keep buying through open cry auctions. We pay, we pack, we ship, we wash, we comb, we spin, we weave, we dye, we finish and we knit and weave, and even if we might have learn to do that better, faster, cheaper, we could agree that our industry hasn't changed much since the 1970s. So, how can we imagine to do better and finally increase the market share of wool in clothing? Fortunately, the world is turning again to us as it is looking for a more durable, sustainable and authentic product.

To achieve this goal we should stop fighting against each other pursuing the old idea that our competitors are other wool producers when in fact it's man-made fibres.

So far, we have been told to ignore Animal Welfare organisations, but the strategy hasn't worked. Despite all we've done, we're still under the spotlight because we work with animals. Meanwhile, 160 million tonnes of micro plastics (35% of which comes synthetic textile fibres) are polluting our oceans and killing millions of animals. Oceans have more plastic than fish today.

If we are not sitting at the table, we are part of the menu. We should team up with other industries like cotton, cashmere and maybe even leather, which are facing the exact same problem. If we manage to shift our mentality to this, we will succeed.

The pandemic might declare the end of "extreme consumerism" as many people start rejecting the idea of buying goods in large

volumes because of the environmental impact. Fast Fashion brands which rely very much on cheap labor have had to prove to their customers their social commitments in offering support to garment workers in Bangladesh, after being criticised by their customers for cancelling orders with their local suppliers.

Traceability gives visibility to this and many other social and environmental issues that then punish us in the form of global warming, uncontrolled immigration, pandemics, etc - in turn generating huge economic and social costs that we indirectly end up paying.

Rise of Resale

If "your trash can become someone else's treasure", second-hand clothing is all about treasure. According to the World Economic Forum, the market value of second-hand clothing in the USA has reached US\$25Bn and is expected to get double in the middle of the this decade, surpassing the sales of fast fashion. As we're moving to bigger cities, our apartments are getting smaller and if you must live in a small place you've got to be tidy. Likewise, if you want to buy clothes, you must sell you old ones.

The reasons of the boom of second-hand clothing are many and various -

Number 1: most second-hand consumers

simply find vintage clothes more interesting. The second-hand market has a huge variety of vintage fashion and allows you to grab your style and be more creative.

Number 2: fashion is considered to be the second-largest polluting industry in the world and 64% of clothes end up in landfills, but the second-hand market is reducing pressure on our planet.

Number 3: used clothes are cheaper than new ones, allowing designer pieces to fit into your budget. Would you consider second-hand shopping as a treat to our industry? It could be said that it would be if we were a volume-driven business, but we are a niche. According to the Global Wardrobe Study, conducted by the Woolmark Company, wool garments are amongst the longest kept in the wardrobe, are washed less frequently and tend to live on through re-sale or change of ownership. So if you consider the price of a product as the difference between your purchasing price and the re-selling price, wool could become much more affordable than most other fibres.

Giorgio Armani, a friend of the wool industry, recently said, "The decline began when luxury pursued fast fashion. The enforced slowdown has brought to light the need for new values. This pause is giving the World a

chance to renew the pace of proposing ideas, re-focusing on production cycles and working in harmony with the seasons, allowing a more liveable and therefore quality-driven fashion."

He said that his Summer collections will remain in the boutiques at least until the beginning of September, as it is in keeping with the seasons. And so he will do this from now on.

Through this bold statement, Mr Armani reinforces his invitation to focus on slow-paced high-quality products adding to the message of focusing on authenticity to "regain human dimension". Gucci has recently announced will do the same and hopefully more will follow suit.

This is slow fashion - this is the world of wool.

This is Authentico.

We are currently offering a 1% premium to ASWGA Authentico members who sign up with our long term contracts.



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ASWGA WELCOMES NEW MILL MEMBER

THE JAPAN WOOL TEXTILE CO., LTD (NIKKE)

Company Philosophy

The Nikke Group will meet every challenge with passion and pride and is a corporation that focuses on the wellbeing of people and our planet.

For more than a hundred years, Nikke, as a comprehensive manufacturer, has consistently highlighted the significance of wool as an environmentally friendly natural fibre.

On the basis of contributing to society, Nikke provides products and services that will satisfy the needs of customers by expanding business branches from our Textile and Clothing Materials division to Consumer Goods & Services, Shopping Centres, Sports Facility Management, Nursing Care for Elders, Communication Related Business, Amusement Business, and Engineering.

The core business of our Textile and Clothing Materials division is the manufacture and sale of uniform fabrics (wool and wool-blend). The market share for uniform materials is No.1 in Japan and we deliver to many companies, schools, public institutions, etc. In addition to selling domestic fashion apparel in Japan, we started exhibiting at Premier Vision in 2002, and are focusing on overseas export business, including fabric sales to many luxury brands in Europe. We are maximising the knowledge and technology gained from manufacturing and selling clothing fabrics for fashion garments and uniforms.

Fusion of tradition and innovation

Nikke's state-of-the-art technology has developed through 120 years of manufacturing. As well as accumulating technology from our capability to develop and design, we use the latest technology to respond to the individual needs of customers. The production facility that supports our technology is truly diverse. We have maintained all the old machinery which is still in active use, while using the world's most advanced facilities in order to meet the cutting-edge demands of our customers. This is why a "fusion of tradition and innovation" can be made possible, since we are able to produce not only the fabrics of historical value accumulated in our 120-year-old archives, but also the latest fabrics that meet the demands of the latest trends. In regard to raw materials, we have set Nikke's unique standards to

differentiate ourselves and at the same time, we are taking a proactive approach to meet increasing sustainability requirements.

Premier Vision

Since 2002, we have run a booth at Premier Vision as the first Japanese company in this exhibition. Our skills based on our history and breadth of design consistently amaze the world.

Premier Vision Award

2010-2011 A-W	Woolmark Special Prize
2012-2013 A-W	The Imagination Prize

Below: The Imagination Prize awarded for the boldest, most original, most amazing fabric and leather in terms of decoration, technique, finishing, innovation and technology.





Mr Oono, the top textile designer of Nikke designing the textile inside the Nikke Creation Studio in Ichinomiya.

Textile Design

Nikke's top textile designer, Masahiro Oono has won two awards at the premier international textile trade fair, Premier Vision.

Our innovative and creative textiles are designed with Oono's unique Japanese sensibility, with inspiration from Nikke's 120-year-old archives and the latest trends. The world's top brands wait in anticipation for the launch of our annual collections.

The craftsmanship of Masahiro Oono's textiles originate when he puts his mind to the person he envisages wearing them. Oono utilises his knowledge and experience gained over the years to gradually realise the full vision. The design process ranges from deciding the thickness and the twisting method of the yarn, the number of yarns, the weaving method, to the number of rotations of the loom and sometimes even developing new yarns. The unique and precise designs of these textiles that are produced by Japanese advanced

processing techniques, is not only high quality, but also imparts a new yet traditional feel.

Sustainability

With growing awareness of global environmental protection, the excellent characteristics of wool as a "natural" and "eco-friendly" material are being increasingly



recognised. While there have been changes in the production of fibres over the years, Nikke has continued to introduce the marvels of this earth-friendly fibre since its establishment.

Sheep thrive in the natural world's ecosystem - growing under the sun, water, earth and fresh air. Wool shorn from sheep is a purely natural gift from nature. Wool returns to the soil since it is made of protein and is completely decomposed by microorganisms in the soil. Sheep grow wool every year so this is a sustainable cycle that is all natural and continuous. Nikke is committed to promoting and developing wool and we support activities that contribute to a sustainable society.

We have purchased your superior wool - many thanks for the introduction from Motohiro. ASWGA's high quality wool elevates the Nikke brand to promote and develop our product globally as well as locally.



Above: examples of the beautiful fabrics made from superfine wool

Below: Nikke's Innami Mill built in 1919. It is made from English red bricks.





SHAN DONG NANSHAN ZHISHANG SCI-TECH CO. LTD

Shan Dong Nanshan Zhishang SCI-TECH Co. Ltd is a state-level high-tech enterprise integrated with intelligent manufacturing and brand operation. Its comprehensive equipment ranks among the most advanced in the same industry in the world and is one of the few large-scale production bases of worsted compact fabrics in the World. It's also one of the leading production bases of modern suits in China. The overall strength of the company ranks top in the competitiveness of China's textile and garment enterprises.

At the beginning of its establishment, Nanshan Fabric & Garment Co. Ltd vigorously promoted the strategy of international development. With the strategic orientation of "based on China and global distribution", the company focused on establishing a globalized modern enterprise. Now it has global resource research and development, marketing, an operations department and formed an international talent training system and the international information resources integration platform for the modern enterprise architecture.

Shan Dong Nanshan Zhishang SCI-TECH Co. Ltd industry chain encompasses Australian high-quality wool supply from combed wool processing to spinning, weaving, dyeing and finishing of the worsted system. From fabric, through to advanced clothing, complete product development, production, marketing, service apparel system and sound spare yarn stocking and rapid order delivery response system, to provide customers with one-stop efficient service.

Our company has a complete product development and technological innovation system, with national laboratory, national high pure wool product development base, provincial engineering technology research centre, provincial industrial design centre, wool textile research institute, institute of professional attire and the international wool innovation center high level innovation platform. Companies from Italy, Japan,

Britain, the United States use the skills of the technology team of experts within Nanshan fabric and garment industry to provide advanced technical support and guarantee customer satisfaction.

Our company has established the stable integration of production, study and research cooperation relationship with Xi'an Engineering University, Beijing Institute of Fashion Technology, Donghua University, Wuhan University of Textiles and well-known textile colleges such as Yantai Nanshan University. In cooperation with the international wool bureau-established wool innovation center (WDC), we participate actively in wool textile technology projects at home and abroad.

Shan Dong Nanshan Zhishang SCI-TECH Co. Ltd always adheres to brand development strategy, depending on its solid strength established by ODM global division, MTM (custom) global group, electrical group and Beijing Investment Beta Fashion Co. LTD. We have diverse operations including NANSHAN (NANSHAN fabric), Dellma (mar, professional garment association), PAUL BETENLY (beta), BosaMagine (Po sayin) and many others.

Company targets creating the international first-class enterprise has passed ISO9001 international quality management system certification, ISO14001 environmental management system certification, OHSAS18001 occupational health and safety management system certification. In recent years, the company has won provincial and national honor and recognition, a National Enterprise Management Innovation Prize, the National Textile Industry Award, "The National Quality Standard", the First Through The "Green Factory" Authentication Enterprise, Textile Technology Innovation Demonstration Enterprises, China's leading enterprise, Chinese Popular Fabric Business Attire Design Contest Gold Prize, in Shandong Province Scientific And Technological Progress First Prize, and obtain the China Textile Industry Association Of Science And Technology Awards.

NANSHAN brand worsted fabric and DELLMA professional clothing brand have been awarded the well-known trademark of China. Worsted production, based on Internet of things technology and large data application technology of worsted intelligent management project, as well as clothing high-end customization for the "2017 ministry of intelligent manufacturing pilot demonstration project" and one after another for the 2012 London Olympic Games, APEC leaders meeting in 2014, and 2014 golf national duty Rio Olympics and world leaders, the team is full of famous people, from all walks of life, to provide custom service. Nanshan fabric brand is an important partner of global luxury brands and famous brands.

Shan Dong Nanshan Zhishang SCI-TECH Co. Ltd always adheres to green, intelligent manufacturing as the foundation, technological innovation as the driving force, brand management as the core and capital operation used to leverage a sustainable, healthy development philosophy. Adhering to the core values of "responsibility, integrity, quality, innovation" and "scientific leadership and sound development", we provide high quality products and services for global consumers.



ASWGA FLEECE COMPETITION WINNERS 2019-20

Congratulations to *David and Angie Waters of Tarrangower of the New England Region* for their win in three categories of the ASWGA Fleece competition, the class 80s quality along with first place in the New England region and the big one, the “Cleckheaton Grand Champion” Trophy for the best overall fleece.



Dave and Angie Waters, Tarrangower Merinos

“We were excited and honoured to receive the news that we had won the 80’s section, the New England region and the Cleckheaton Grand Champion Trophy in the ASWGA Fleece competition this year. Given the challenging growing season and the high calibre of competitors, it came as a huge surprise and an achievement of we which we are very proud of.

We would like to thank the sponsors, Bendigo Woollen Mill and The Australian Yarn Co, for their support of the competition and to everyone who contributes to making it a success. Congratulations to all placegetters and we wish everyone a favourable season and that international sentiment and wool prices soon improve.”

Congratulations to all winners of respective regions and quality classes.

There were sixty-plus fleeces entered in this year’s competition and the results were very close.

A huge thank you to our sponsor Bendigo Woollen Mill and The Australian Yarn Company for the grand trophy and to AWTA for arranging transport of fleeces for judging. We would also like to thank Roberts Ltd, Australian Wool Network, Schute Bell Badgery Lumby and Nutrien Wool for collection and transportation of the members fleeces.

A special thank you to the fleece committee and Ray Moroney and Bob Menzies, our foot soldiers. The actual judging is made easier with the organising, delivery and storage of fleeces and judging space made by Mark Hedley and staff of AWN, not only for ASWGA, but also the Zegna judging. It was a huge effort and greatly appreciated by the Association.

Finally, thank you to judges Greg Andrews of Schute Bell and Lachie Brown from Elders.

Funds raised from the sale of the wool entered in the competition will go back to the Association.

PLACE	SCORE	WINNERS
Grand Champion Fleece	95.5	David & Angie Waters of Tarrangower - New England NSW
90’s	94.6	Carol & Allan Phillips of Glen Stuart - Tasmania
80’s	95.5	David & Angie Waters of Tarrangower - New England
74’s	95	Lesleann & Mark Waters of Riverton - New England
70’s	95.25	Ed Hundy of Windradeen - Mudgee
Albury/Wodonga	88	Andrew & Stuart Drinnan of FibreFine Merinos - Albury/Wodonga
Ararat/Barunah	93.6	Heather & Geoff Phillips of Currawong - Ararat/Barunah
Goulburn/Yass	94	Megan & Danny Picker of Hillcreston Park - Goulburn/Yass
Hamilton	94.05	Victoria & Bradley Venning of Kilmarnock - Hamilton
Mudgee	95.25	Ed Hundy of Windradeen - Mudgee
New England	95.5	David & Angie Waters of Tarrangower - New England
Tasmania	94.6	Carol & Allan Phillips of Glen Stuart - Tasmania
Western Australia	90.4	Faye & Jim Pepper of Mumballview - Western Australia



Gus Hundy with Mudgee Region winner Ed Hundy



Below: Danny Picker of Hillcreston Park winning the ASWGA Goulburn and Yass Regional Fleece Competition for 2020



Roland Ritson presenting Jim Pepper with his plaque for 1st place in the Western Australian region

AUSTRALIAN SUPERFINE WOOL GROWERS' ASSOCIATION: ANNUAL FLEECE COMPETITION

The fleece competition attracted 66 fleeces from 29 members across eight Australian Superfine Wool Growers' Association (ASWGA) regions (Table 1) with an average of just under three fleeces entered per participating grower. Mudgee had six members entering the competition, although Ararat-Barunah members entered the most fleeces - almost a third of the competition entries. Fleeces from each region generally fell within a common quality count range, predominantly 80's (28) and 90's (19) and a 100's entry for the first

time in a number of years. The movement to higher-quality count fleeces than the trend in recent years is possibly a reflection of the drier than average conditions. Most regions have a relatively wide variation in Quality range and the Score received by individual fleeces, with over ten points being relatively common, although Tasmania was more closely clustered. While seasonal conditions varied from region to region there is little evidence that variation in seasonal conditions hampered any region from producing high scoring fleeces, as

evidenced by the similarity in highest score for each region, although fleece weight range and maximum fleece weight varied across the regions (Tables 1 & 2).

The mean scores of the fleeces entered from each Region (Table 2) highlights regional variation. Fleeces from Tasmania and Mudgee consistently scored better across all attributes relative to the respective means, while Ararat-Barunah and Western Australia consistently underperformed, with Albury-Wodonga, Hamilton and New England performing variably. Table 2 also shows the overall ranking of the Regions with Tasmania ahead of Mudgee with Goulburn-Yass and New England coming third and fourth respectively. The other four Regions were below the mean Score.

Of the six attributes judged, the mean score for Yield received the greatest proportion of that possible (91.0 pc) closely followed by Weight (89.9 pc) while Excellence received the least proportion of the possible score (81.3 pc). Fleece weight of entries varies considerably (CoV=38.25 pc) in large part because of variation in quality count range. Evenness (87.8 pc), Uniformity (88.1 pc) and Trueness (86.0 pc) all received relatively uniform high proportion of the possible score (Table 2).

Table 1: Overall summary by Region of 66 fleeces entered in ASWGA Fleece Competition.

No	Region	Growers no.	Fleeces no.	Quality range	Weight range	Score range
1	Albury-Wodonga	1	1	90	2.15	88.00
2	Ararat-Barunah	5	19	74-90	1.75-4.40	66.40-93.60
3	Goulburn-Yass	4	7	74-100	1.65-3.85	81.90-94.00
4	Hamilton	2	5	74-90	2.00-3.50	79.40-94.05
5	Mudgee	6	14	70-90	1.60-5.10	82.60-95.25
6	New England	5	9	70-90	1.65-5.00	73.40-95.50
7	Tasmania	4	8	74-90	2.60-3.70	90.20-94.60
8	Western Australia	2	3	74-90	1.45-3.60	73.90-90.40
	Total/ Mean	29	66	70-100	1.65-5.00	66.40-95.50

Table 2: Mean attribute scores for each ASWGA Region and overall. Bold blue cells are above the average for the attribute and yellow cells are below the attribute mean - those unshaded coincide with the mean. The overall mean attribute scores are shown as a percentage of the maximum score possible for the attribute. The coefficient of variation (CoV) is also shown for each attribute.

Region	Fleeces (no.)	Weight (kg)	Weight (22)	Yield (10)	Trueness (20)	Uniformity (15)	Evenness (18)	Excellence (15)	Score (100)	Rank
Albury-Wodonga	1	2.15	17.80	9.2	18.0	14.0	16.0	13.0	86.80	5
Ararat-Barunah	19	2.97	18.95	8.8	17.0	12.9	15.4	11.2	83.86	7
Goulburn-Yass	7	3.14	20.74	9.2	17.1	13.3	15.9	12.6	88.84	3
Hamilton	5	2.66	17.88	9.2	17.6	13.0	15.8	12.8	86.29	6
Mudgee	14	3.16	20.99	9.5	17.3	13.2	15.9	12.5	89.48	2
New England	9	3.08	18.62	9.2	17.4	13.4	16.1	12.8	87.55	4
Tasmania	8	3.20	21.80	9.6	17.5	13.6	16.1	13.1	91.75	1
Western Australia	3	2.77	18.67	8.1	16.7	13.0	15.0	10.3	81.73	8
Total/Mean	66	3.03	19.77	9.1	17.2	13.2	15.8	12.2	87.24	
Possible (pc)			89.9	91.0	86.0	88.1	87.8	81.3	87.24	
CoV (pc)		38.25	16.04	9.6	6.30	5.71	5.57	14.95	7.37	



Taking the mean results for each Region, the six attributes judged were variably correlated to the final Score (Table 3). Weight ($r=0.820$) and Yield ($r=0.842$) were highly correlated to the Score while Excellence was least correlated ($r=0.625$), this is in contrast to the previous season where the difference between the highest and lowest correlation was much smaller and Yield was less correlated ($r=0.707$). These dual, but complementary correlations, are consistent with the purpose of the fleece competition, namely, to reward heavy cutting fleeces within their quality count class and not just the quality count per se. Together, Yield and Weight

combine to provide the heaviest cutting fleeces on a clean basis and together are the best predictors of a fleece's overall Score. Unfortunately, on the other hand, Excellence received lowest proportion of that possible (81.3 pc), thereby offering an opportunity for improvement for underperforming fleeces, this is also supported by CoV (14.95 pc) which is the highest for the attributes. This contrasts with the previous year and may be the outcome of a harsher growing season. All other attributes are relatively uniform in their variation as indicated by the CoV (Table 2) and correlation with the Score (Table 3).

The difference between the lightest (1.45 kg) and heaviest (5.10 kg) fleece was surprisingly large although the difference of 3.65 kg was very similar to that of the previous season (3.8 kg), however both being heavier. The extremes had quality counts of 90's and 70's respectively and, although from different Regions, smaller fleece weight difference could be expected. In addition, for most fleece weight intervals (Table 4) there is considerable variation in the Score received- an average of more than 10 points. As expected, there is a general increase in Score as fleece weight increases, peaking for 3.0-3.9 kg interval coinciding with the cap for most Classes. With the establishment of a fleece weight cap, the top scoring fleeces need not be in the highest weight interval. In fact, the fleece receiving the highest Score was only 61 percent of the weight of the heaviest fleece, although with a high-quality count (80's) it still exceeded the cap for its Class.

Table 3: Correlation and Rank of the Score with each of the attributes judged.

Attribute	Weight	Yield	Trueness	Uniformity	Evenness	Excellence
Correlation	0.820	0.842	0.704	0.725	0.733	0.625
Rank	2	1	5	4	3	6

Table 4: Comparison of mean Score and difference between minimum and maximum Score for different fleece weight intervals.

Weight (kg)	Mean weight (kg)	Min Score	Max Score	Mean Score	Score difference
1.0-1.9	1.75	66.4	82.6	76.2	16.2
2.0-2.9	2.55	79.4	94.6	86.3	15.2
3.0-3.9	3.46	80.9	95.5	90.5	14.6
4.0-5.1	4.32	82.4	95.0	90.6	12.6
Overall	3.04	66.4	95.5	87.2	29.1

Interestingly, the composition of the fleece entries has changed significantly over the last seven years. In 2013-14 the dominant class was 90's (49.2 pc), then a near even distribution across the Classes in 2014-15,

followed by 80's domination (46.7 pc) in 2015-16, then near even distribution again in 2016-17 before domination by 74's (55.7 pc) in 2017-18. This trend did not persist, in 2018-19 with 80's and 90's being the dominant entries, a trend

that was repeated again in 2019-20 and is no doubt due to the tough seasonal conditions across all regions.

John Ive, Talaheni, July 2020

Table 5: Comparison of entries by Class over the last seven years. The blue highlighted cells indicate a previous decrease in quality count of the dominant Class over five years followed by a reversal in recent years.

Class	2019-20		2018-19		2017-18		2016-17		2015-16		2014-15		2013-14	
	No.	Pc	No.	Pc	No.	Pc	No.	Pc	No.	Pc	No.	Pc	No.	Pc
60's							1	1.4						
70's	2	3.0	5	6.2	11	13.9	13	18.3	7	6.5	7	12.3	12.3	4.6
74's	15	22.7	17	21.2	44	55.7	18	25.4	25	23.4	16	28.1	28.1	9.2
80's	29	43.9	29	36.2	22	27.8	22	31.0	59	55.1	19	33.3	33.3	36.9
90's	19	28.8	29	36.2	2	2.5	17	23.9	15	14.0	15	26.3	26.3	49.2
100's	1	1.5							1	0.9				
Total	66		80		79		71		107		57		65	



ASWGA FLEECE COMPETITION ROLL OF HONOUR OF PREVIOUS WINNERS		
YEAR	WINNER	REGION
2013/14	Glen Stuart- Carol & Allan Phillips	Tasmania
2014/15	Avington Merino- Noel & Lyndsay Henderson	Ararat/ Barunah
2015/16	Kelseldale- Penny & Russell Hartwich	Ararat/ Barunah
2016/17	Windradeen- Ed & Jill (dec.) Hundy	Mudgee
2017/18	Edington Partnership- Mark & Lesleann Waters	New England
2018/19	Oak Hills- Irene & Daryl Croake	Mudgee
2019/20	Tarrangower- Angie & David Waters	New England

NATURAL CAPITAL ACCOUNTING: A NEW PERSPECTIVE ON PROFIT

New ways of thinking are changing how we can better understand and measure Farm Profit.

With some 80% of the investment in a farm tied up in the land base, it makes good sense that we incorporate the measurement of the condition of this important business asset into our thinking on farm profit.

There is increasing consumer demand for wool produced in an environmentally sound manner. The capacity to provide evidence for good environmental management, through Natural Capital Accounting, will give growers a sound basis to supply into this market.

Natural Capital Accounting can be useful from both a farm profit and a marketing perspective.

Natural Capital (or Environmental) Accounting helps us assess the natural capital that is present on a farm and can complement existing financial measures of profit. Doing this will allow the manager to clearly see any relationship between farming practice, environmental impact, and farm business performance and to track changes in Natural Capital over time, in the same way we do for other forms of farm capital.

Incorporating Natural Capital measures to complement existing financial measures, can give a broader view to assessing end of year farm profit and returns.

This means that decisions around investing in improving the condition of natural assets can now be based on measurable on-farm results and trends over time.

This article overviews a recently completed study, funded by Australian Wool Innovation,

which applied a Natural Capital Accounting and Environmental Profit and Loss approach to calculate impact of natural capital on Farm Business Performance for 11 case study farms across Eastern Australia.

The study was the first of its kind in creating farm level natural capital accounts and the results were very interesting.

Understanding Natural Capital Accounting:

Natural Capital (Environmental Economic) Accounting is a new knowledge field for Farm Business Management. It is in the early stages of development.

To prepare a Natural Capital Report on their businesses, growers contribute farm operational information and have a rapid and targeted farm assessment undertaken by an ecologist, which takes around three hours.

Additional data on the farm is collected from Satellite using the Farm Map4D program. This includes the capacity to go back in time to examine historical measures, such as ground cover.

A detailed report can be prepared for each farm to assess the Natural Capital base.

A farm natural capital can be presented in several ways. In this study, and based on published research and using industry standards, a farm's natural capital was presented as Ecosystem Services (Outputs) across 12 criteria, Ecosystem Type, Use and Capacity, estimated Carbon Storage.

A detailed Environmental Profit and Loss statement covering key criteria was also

undertaken, and the published Kering methodology was used. Groundcover assessments using the FarmMap4D program allowed for historical measurements to be made for up to seventeen years.

Having clear information on the change in condition of the major business asset (Land) across a broad range of criteria, along with financial performance, can give a broader view of Farm Profit.

It can also provide a measure for each grower as to their farm's "environmental footprint" when producing wool.

This study was the first of its kind. Over time, we hope benchmarks of natural capital will start to emerge and become available, in the same way that industry financial benchmarks are in use.

Results from the eleven case study farms:

The eleven case study farms were in the grassy woodland biome and the sheep wheat zone across eastern Australia. Five were in NSW, three in Victoria and three in Tasmania.

They were selected to cover a diverse range of climates, production systems and landscapes.

Natural capital accounts and environmental reports were prepared for each grower.

The report found that most of these farms, as an outcome of their normal management practices, may be conserving and in many cases, regenerating the iconic Grassy Woodlands. Between them, the case study farms were conserving more than 30,000 ha



of healthy grassy woodlands and native pastures, protecting their soil and keeping water ways healthy. This is a positive story for the industry.

The levels of long-term groundcover in the study were high and rarely dropped below 80%. They were also consistently higher than local farms.

The rates of CO₂ emissions and sequestration varied greatly depending on the farming system used and the type, extent, and condition of vegetation. It is likely that many of the farms captured more CO₂ than was emitted, and more work to validate these initial calculations continues.

Over time, and with more farms contributing, benchmark levels for the above can be prepared.

A surprising outcome:

Kering developed the Environmental Profit and Loss (EP&L) methodology to help their business understand their environmental impacts and to reduce them. In the past, EP&L has been calculated for an industry, using general/generic information. You can read more about their approach here: <https://www.kering.com/en/sustainability/environmental-profit-loss/>

This study prepared inputs to the Kering EP &L methodology using actual farm data to estimate the environmental impact of each farm's operations on the environment, across the range of criteria.

Interestingly, all farms in the study all had

substantially lower impacts on the environment than had been previously published by Kering using their generalised industry EP&L methodology. This was particularly the case for Greenhouse Gas Emissions (per kg of clean wool) and impact on ecosystem services.

This study, while small in sample, suggests that the generalised Kering EP&L findings could overestimate the impact of woolgrowing on the environment, particularly for growers who have restoration of the environment as part of their management goals.

This is an area that needs more work to ensure that the environmental impact of the wool industry is accurately calculated and represented.

Practical uses for Natural Capital Accounting:

There are many potential benefits from including Natural Capital Accounting as part of normal farm business management.

The farm decision makers can now be provided with measurements of the condition of their major asset, the land. They are now able to assess a change in environmental condition over time across a range of assessable criteria.

In the short term, Natural Capital Accounting can be used by interested woolgrowers to communicate the outputs of their management. There is a growing industry segment which is seeking to source wool from growers producing in an environmentally conscious manner. Natural Capital Accounting can clearly document the impact of

management decisions on the farm's Natural Capital base. Additionally, the information contained in the Environmental Profit and Loss statement presents this information in the language which is familiar to industry.

In short, it can create direct feedback to industry, in language they understand. This may be a business opportunity for the grower.

In the longer term, there is potential for this information to be valued for management purposes. Changes in Natural Capital may become part of the farm business's end of year reporting. A change in Natural Capital could be valued and treated in the same way as other forms of farm capital, such as Land, Plant, Machinery and Stock for internal reporting purposes.

Conclusion

Natural Capital Accounting may have an important role to play in future farm management.

Measuring changes in Natural Capital over time could provide complementary information to the range of existing measures of farm financial performance measures currently in use – to lead to a broadened view of farm profit.

It may also open significant business opportunities for those growers who wish to pursue them.

Mark Gardner
Vanguard Business Services



ASWGA: A GLIMPSE AT THE FUTURE



The Superfine wool industry is again being challenged by the changes rolling through the world. We happen to be in the forefront of changes in the fashion industry.

Watching the continued fall in the Superfine wool prices while seeing a changing of the dress/fashion trends underlying this move is distressing. We have a change of fashion trend, with suiting fabrics out of favour in some quarters, which is yet to be balanced by an increase in interest from the sustainable recyclable sector of the market. This was compounded by the continuing trend for faster and cheaper clothes. All the favourable qualities of wool that we accept as woolgrowers are being recognised by a small but growing market.

The market has hit the wall with the advent of the COVID-19 pandemic. People are questioning the production chain for the fast fashion industry. To seek control of the production line for wool appears beyond our capabilities since the major dismantling of Australia's processing capabilities 20 or so years ago.

Not only have we lost control of production, we've lost the language appropriate to our industry as the marketers have taken the words relevant to wool and applied it to artificial fibre. To allow terms such as fleece to be applied in the same sentence as natural acrylic, show how far our language has degenerated. We could have learnt a lesson or two from the French, when they regained control of the language around their wines. We can regain the language and re-enforce the woolmark in its position as one of the world's most recognisable logos, with the will and effort required.

An interest in utilising the genetic tools now available is being discussed. With millions of lambs each year, there are bound to be genetic oddities that will be of future use in the industry. Our president, Danny, has already

identified a woolgrower with one sheep with a bare breech a Stud Ram owned by Tom and Kate Kirk of the Bundemar Stud. This should be of use for genetic modification. It would be valuable if a tailless or reduced tail lamb was identified as the source of genetic material to avoid having to dock tails. This docking process will probably be the next big thing, after mulesing, for animal rights activists to focus on.

The appearance of legislation that will ban the use of mulesing was to be expected. We have ignored the examples in our industry of Superfine breeders who have bred the need for mulesing out of their flocks. To believe we will succeed by using pain reduction methods doesn't stand up to logical thinking.



Fig. 1 Natural bare breech and scrotum.

Turning away from cutting edge science is a further field that is a worry. Chinese researchers have mastered cloning but more importantly, from a development point of view, they are mastering the use of gene

editing. Using CRISPR cas9 technologies they have removed a gene from the genome of both goats and sheep that has resulted in increased fibre production from the animal without sacrificing fibre quality. Do we even try to catch up? With more than twice the sheep numbers that we have and the mastery of cloning, is it only time before they produce significant volumes of the wool they need without looking elsewhere?

The present disarray in the Italian market, where suffering is real and ongoing, mirrors the changing fashion scene. Luxury garments once so heavily reliant on elegant wool products has changed. Will the emerging markets pick up on the fundamental properties of wool demanded by the sustainable market. Will it also pick up the luxury end? That requires a crystal ball that we don't have.

Perhaps the most positive development has been the surge in farm related marketing with woolgrowers marketing their own value-added products or being featured in the marketing of processors garments. The power of developing an identity in the marketplace places pressure to perform but has long lasting effects. We hope this applies well past the current impact of the COVID-19 pandemic.

Ian L. Gill,
Jemala Pty Ltd

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COLIBAN PARK - JESS & DUNCAN BARBER

Winners of the Vitale Barberis Canonico wool excellence club award and Farmer of the Year 2019

I guess I had the lucky advantage of always knowing what I wanted to do when I was a young fellow, except for a short period of time when I thought that I should become a pirate, apart from that I always just wanted to come home and work with my Dad. I left school when I was 16 and returned home. I was lucky enough that Dad thought it a good idea that I should spend some time working for other people as well, so he sent me off every now and again for short stints on other people's properties. He always said that you only needed to learn one good idea and you had paid for your day. Thankfully I learnt many a good idea from him.

We are very fortunate that the sheep here on Coliban Park have a history going back to the 1850s when William DeGraves brought the foundation sheep from John Aitkens flock and moved them up here. DeGraves then purchased sheep from other noted flocks and also imported rams and ewes from Adolph Steiger, Lentewitz, Saxony and also from the Royal flocks at Rambouillet. DeGraves had entrusted the sheep management to a very competent man by the name of Robert Oliver.

Mr Oliver managed the sheep and the sheep classing until DeGraves' Estate was wound up and Coliban Park was sold, in 1886, to Mr. W. H. Davidson who bought the place w.i./w.o. For the next thirty years the Davidsons oversaw the management of the sheep and adhered to the style and breed, with rams being purchased from Wm. Gibson of Scone in Tasmania, as well as rams from John Taylor, Winton, Tas.

In 1917, my Great-Grandfather, Anthony Barber, purchased Coliban Park which at that time was 15,293 acres. Included in the purchase



Top: Robert Oliver Snr, and Robert Oliver Jnr, 1869.
Middle: Sale pamphlet for Coliban Park, 1917.

was 13,000 sheep, 32 horses and 4 cattle. He maintained the same bloodlines by buying in rams from the Saxon flocks of Tasmania.

One ram in particular that gets a lot of mention throughout the books was a ram from Winton called Young Nationalist. According to the books he was used to great success

in the stud for many years. In 1927 the reins were passed once again, this time to my Grandfather, John (Jack) Barber and his Brother Tony. Coliban was reduced in size to 12,000 acres in the thirties and then again after the second world war to 6,500 acres to accommodate the returned servicemen, under the compulsory acquisition scheme. The sheep were kept on and were still being adhered to the same breeding.

In 1944 a bushfire cut a path through Coliban, burning a lot of the stock and all the outbuildings, including the original woolshed that was built in 1859. Replacement sheep were sourced from the flocks of Tasmania once again. It was my Grandfather's turn to purchase a ram that got a lot of mention. Once again, the purchase was from Winton of a Ram called Baldwin. He was used for many a year in the stud. I can still remember Grandpa talking of him.

My father left school at age 16 near the end of 1956. According to my father it was around shearing time and he said to Grandpa, "We must be shearing soon are we?" to which Grandpa replied "That's for you to work out." Grandpa then got in his Rolls and headed off to one of the other properties. That was when father took over. Dad and Mum did a great job of running Coliban and maintaining the flock and its history. They took it upon themselves to market the wool in both Italy and Japan, going over on occasion to sell direct to the mills. They had wonderful relationships with mills from both countries and we looked after many of their guests. Rams were purchased from Tasmania and also from the mainland. Sierra Park played a great role and father adored Lin Crawford, from whom he gained a lot of knowledge.

Sixteen must have been the magical number to leave school because that is when I left and returned home. I was lucky that I got to work alongside Dad for six years before he was



diagnosed with Non-Hodgkins disease. For the next ten years he managed the bookwork while I did all the outside work. He still pointed me in the right direction but gave me the run of the place. In 2005, after Father passed away, was when Jess and I officially took over the full management of Coliban Park.

The sheep haven't changed much while under our stewardship - the one thing that has changed is that the frame of the sheep is bigger. There is a photo of grandpa holding onto a ram back in the 1930s and the ram only



Loading wool from original shed, 1869.

just coming up to his knees. Now the sheep are a lot bigger but with the same style of wool that has been produced on the place for the last 161 years.

Jess and I were honoured four years ago when we were asked to become members of the Vitale Barberis Canonico wool excellence club. It has been one of the best things that could have happened to us. Under guidance we have strived to make sure the end result in the woolshed was classed to a higher standard to suit the expectations of VBC. We were thrilled to receive the top honour for production and quality at the 2019 annual dinner for the VBC wool excellence club members. Unfortunately, due to current circumstances, we were unable to take the trip to Italy to see the wool being processed - hopefully next year.

Last year Jess and I were nominated for the Weekly Times Farmer Of The Year awards for the sheep section. There were three finalists for this category and then in March this year the winners of all categories were announced. Jess and I won our section which was exciting for us both.

Jess and I have four children and I hope that one or all of them want to be part of the

business. If none of them wants to be then I'm fine with that also. I always tell them - come home because you want to, don't come home because you think you have to.

Below: Duncan & Jess Barber

Bottom: Vitale Barberis Canonico's Phoebe Croyle and Davide Fontaneto, Coliban Park's Jack Barber, VBC's Alberto Barberis Canonico and Jess and Duncan Barber - Photo courtesy of Stock & Land



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ASWGA WELCOMES NEW MEMBERS - MYNDARRA

Owners Aaron and Rebecca Rowbottom moved onto the 97-acre "Myndarra" property just three years ago and while being new to running their own property, they have been around the ultrafine Merino and sheep production industry for quite some time.

While Rebecca grew up in the town of Peshurst in southwest Victoria, well surrounded by Merino studs, Aaron grew up at his parents David and Susan Rowbottom's "Rowensville" ultrafine Merino property. The couple met in the town of Warrnambool while Aaron was finishing a trade apprenticeship

and Rebecca was working in aged care.

After the birth of their first child, daughter Ally in 2006, Aaron returned to work on the family farm taking in the vast knowledge David has acquired over his many years in the industry. With the extra help, the family was able to venture into housed sheep wool production. After many years supplying sheep to other sheds this was a long-time goal and has been a challenging endeavour for the whole family, requiring considerable long-term commitment for Aaron, Rebecca and their growing family with their son Jensen arriving in 2012.

The "Myndarra" property is full of history, but has been mostly downsized from its original large acreage, once part of the 18,600-acre "Dunmore" station, which was divided among the Baulch family after the First World War. The Porter family ran "Myndarra" for three generations until it was again divided, with the Morgan-Paylor family purchasing the homestead property with over 1,000 acres.

During the Morgan-Paylor's 37-year ownership, "Myndarra" was again reduced with a large amount of land being sold to blue gum plantations, so when the Morgan-Paylor family decided to retire, just the 97 acres surrounding the homestead and buildings remained. One of the remaining buildings was a specially built Ram stud shed for preparing sale Rams during the Porter ownership. It is this building that has given the Rowbottoms the opportunity to run a small number of housed ultrafine Merinos, specifically to enter the Ermenegildo Zegna Vellus Aureum fleece competition, with a second placing in 2019 and a third in 2020.

Success aside, Aaron and Rebecca still believe they are feeling their way into the sheep production world. After fourteen years working in the industry and three years running their own property, there is still much



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to learn. The ever-changing industry has new challenges ahead with Aaron and Rebecca managing their own property while being involved with the future of the Rowensville stud - and aims to continue the low micron un-mulsed bold crimp wool genetics for generations to come and with a very eager 7-year-old Jensen following his grandfather's every move, he is already telling everyone at school how to farm. Aaron and Rebecca are looking forward to the future and hoping for a speedy recovery from the challenging times we are all facing this year.



Above: Rebecca & Aaron Rowbottom with their Ermenegildo Zegna award. Below left: Ally Rowbottom helping out on the farm. Below right: ASWGA President Danny Picker with Rebecca & Aaron Rowbottom and Paolo Zegna. Right: Jensen - keen farmer in the making.



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NATURAL TASMANIAN WOOL

An Exciting New Collaborative Marketing Initiative from Roberts Ltd



Since returning from the launch of Natural Tasmanian Wool in China in December, the Roberts Ltd Wool Team has been working tirelessly to best position the ground-breaking collaborative wool marketing initiative for long-term sustainable success.

More than 130 Chinese wool industry executives and decision makers attended the Natural Tasmanian Wool unveiling at the Shanghai History Museum, applauding Tasmanian wool growers' commitment to ethical and sustainable excellence.

Australia's Consul General to Shanghai, Dominic Trindade, was joined by the Hon. Guy Barnett, Tasmanian Minister for Primary Industries and Water, as part of the brand launch.

Twelve Tasmanian wool growers also attended the event, as well as participated in a week-long Tasmanian Government Trade Mission to visit a range of processing mills within a three-hour radius of China. The growers included:

- Simon Foster, Fosterville
- Shelley Saunders Cocker, Barega
- Lucy Headlam, Oakbank
- Anna Cotton, Kelvedon Estate
- John and Isabelle Atkinson, Maitland
- Eve and Antony Gunn, Forton
- Di and Marcus McShane, Dalmene Park
- Will Eddington, Richmond Park
- Tim Gunn, Gunston

Growers said it was invaluable to meet industry leaders and mill owners at Meng Di Group, Zhejiang Linglong Textile Company, New Chuwa Wool Co, Zhejiang Xinnao Group, Jiangsu Sunshine Group and the Schneider Jiangyin Yuanda Wool Co.

Roberts Ltd Tasmanian Wool Manager, Stewart Raine, said repeatedly we were told there has never been such strong demand for ethically and sustainably produced and fully traceable wool from the farm to the fashion house.

"Buyers of woollen products, whether made-to-measure suits, high-performance active and adventure wear, or luxurious home furnishings,

want to connect with the farmers who produce the fibre", Mr Raine said.

"And that's why Roberts Ltd, part of global agribusiness Nutrien Ag Solutions, has invested so much time, energy and resources into the development of Natural Tasmanian Wool. Our focus is to give our wool growers every opportunity to achieve the best attention and price for their precious fibre."

Within one month of returning from China, the first order for Natural Tasmanian Wool was secured.

Natural Tasmanian Wool differentiates growers who produce wool across a range of breeds and microns and who are independently quality-assured and commit to the Natural Tasmanian Wool Grower Charter.

Roberts Ltd recently informed its highly-valued woolgrowers that the Natural Tasmanian Wool Grower Charter would be further tightened to guarantee global best practice. All farmers will need to be independently



audited and accredited under the rigorous Responsible Wool Standard, as well as The Schneider Group's Authentico Integrity Scheme. This means that only non-mulesed, or ceased-mulesed wool will be part of Natural Tasmanian Wool.

The Company is also investigating world-first technology to enable wool to be traced from the farm to the fashion house to prove provenance and better tell the stories of our innovative growers and enable lifelong connections between consumers and farmers.

Mr Raine said growers had readily embraced the strict brand requirements to guarantee global best practice.

"I have been incredibly inspired by the positivity and unwavering commitment of our growers to ensure Natural Tasmanian Wool is recognised globally as the world's best", Mr Raine said.

"We are in one of the toughest wool markets, with so much uncertainty surrounding global

trade and consumer confidence, but our growers are preparing to work through the Responsible Wool Standard accreditation process, stop mulesing and ensure their clips can be marketed as part of the Natural Tasmanian Wool brand.

"We are confident that the wool market will rebound, and our Tasmanian wool growers will be ready."

Shelley Saunders Cocker, who with her husband Chris, produce 15.5 micron Merino wool on their Nile property, said Natural Tasmanian Wool had been extremely well received by the Chinese wool sector during the Trade Mission as the brand clearly met the demands of all facets of the supply chain.

"The growers sincerely thank Roberts Ltd, Nutrien Ag Solutions and the Tasmanian Government for the incredible opportunity to learn, listen and liaise with some of the world's leading wool processors", Mrs Saunders Cocker said.

"Applying a global focus to our wool production businesses is essential and all growers returned to Tasmania with a united passion to grow and market Natural Tasmanian Wool to global consumers."

Stuart Raine
Roberts Ltd

Opposite page: Mr John Tuskin, General Manager Tasmania, Stewart Raine, State Wool Manager, The Hon Guy Barnett- Tasmanian Minister for Agriculture. Top: China delegation.

Above: Tim Gunn, Lucy Headlam, Isabelle Atkinson, John Atkinson, Di McShane, William Eddington



CELEBRATING TASMANIAN SUPERFINE WOOL PROPERTIES IN THE ZEGNA TROPHY COMPETITION

Since 1963, Tasmanian Superfine wool growers have entered the Zegna Fleece Competition, which was open to entries from 'all around the world.' The Midland Agricultural Association and the Tasmanian Fine Merino Breeders Association ran this 'International Merino Fleece Competition.'

Due to timing for shearing and the need for fleeces to be one season's growth, Northern Hemisphere countries found it difficult to compete. Entries to be received could only be sent by sea and consigned to Melbourne for quarantine, which also deterred these overseas entries.

The Tasmanian owned trophy was donated by Count Aldo Zegna of the Ermenegildo Zegna Company of Trivero, a well-known Italian Company in wool manufacture. The Company had been purchasing Superfine wool in Australia for many years. The first viewing of the trophy was made with the presentation of the cabinet key to Major Ralph Cameron, President of the TFMBBA by the Italian Ambassador to Australia, Conte Reato Della Chiesa d'Isasca (in 1963). The trophy was later presented at a function arranged by the Deputy Chairman of the then Wool Board, Sir Donald von Bibra, in the Wool Board Room in Melbourne, to Mr Reg Taylor of Valleyfield, a well-known Superfine wool grower in Tasmania, who represented the MAA and TFMBBA.

This new award was to develop into a prestigious Tasmanian Competition and lead to a long association with the Zegna family.

In the first year of competition there were twenty-seven entries including ten from mainland Australian States. The first winner for the award was Mount Morriston, the estate of the late Raymond Scott. This property, situated at Ross, was managed at the time by Mr Sam Wigan. This award was a highlight of the MAA show with accolades and praise for the contribution it made to the island State.

There was great rivalry between the top Superfine clips in Tasmania and the mainland. In 1979 the Zegna family promoted a separate trophy from the original Tasmanian award. The dual Zegna competition then ran for almost thirty years until 2008 when the earlier competition ceased. This new Mainland competition was received well with increased entries.

From a Tasmanian perspective, most Superfine wool growers in the island State had become members of the ASWGA which had been established in 1971 with members entering both competitions.

There have been significant changes in the production of traditional Superfine wool since the first Zegna competition was introduced. Production of this wool type declined. To encourage members of the ASWGA, in 2016 the Zegna Company changed the format from a single fleece competition to an award for one to five bales of high quality Superfine wool. Most of the bales entered are of 16-17 micron and less and judged on a points system.

Tasmanian wool growers have always done

well and include entries from Patterdale, Glen Stuart and Kingston properties. These three properties are typical fine wool growing properties in the Deddington and Nile region of Northern Tasmania where most of their land is mainly hilly and light timbered country of native pastures. The winning top ten bale clip entries are predominantly Saxon and Merryville-based flocks run on native country.

Snowhill and Koorunga properties in the Fingal Valley also utilise timbered hill country where the three- to five-year-old wether sheep also graze on native pastures. Rose Villa a property on the Isis River tucked under the Western Tiers and Macquarie Hills situated nearby on the Macquarie River have also featured in this award.

Dry seasons in recent years have presented challenges to the successful management and production of Superfine wool. Generally these properties shear their wethers in Spring which best suits their management. Local wool classer Alister Strickland has classed four of the successful entries and prepared many 1PP bales since the 1980s.

The second-placed entry for 2019 with a 14.9 micron bale and a staple strength of 46nkt was a great result for Allan Phillips, followed by his first place entry with a bale of 14.6 micron and 56nkt in 2020. Allan is a meticulous and passionate farmer who with his wife Carol has been dedicated to Superfine wool production and has been well rewarded.

At Kingston, Simon Cameron employs an

Allan Phillips at
Glen Stuart



enthusiastic team including an outstanding wool classer Evelyn Archer. The Cameron family obtained sixth place in 2019 with a 15.6 micron and 42nkt bale and second place in 2020 with a bale measuring 15.2 micron with 45nkt.

In recent years Patterdale has had notable success in the Zegna competition with fourth place in 2017, sixth place in 2018, fifth place in 2019 and seventh place in 2020 entering a total of ten bales over those four years which is a commendable effort.

The Rose Villa property has been a recent entrant in the competition though Rob Freeman has been a Superfine wool grower following on from his father. In 2019 the 15.7 micron bale entry achieved fourth place with staple strength 49nkt and in 2020 a ninth place was awarded for his 15.4 micron bale with 42nkt.

Ian Thirkell-Johnston operates Macquarie Hills single-handedly. His classer Alister Strickland has successfully classed the clip for over thirty five years. The Macquarie Hills entry for 2019 was a fine 15.2 micron 42 nkt bale and was rewarded a top ten place of eighth in the competition.

Richard Gee of Snowhill and Kooringa has also done well in this award. The family property achieved second place in 2011 for a fleece entry and in 2019 their bale entry was placed seventh. Richard appreciates the opportunity to enter the Zegna competition in an arena where he can benchmark with the "best wool growers in the world" and form "valuable friendships with a common bond of understanding". Other comments from Tasmanian place getters were :-

"A great honour to be in the top ten as we are judged against the top Superfine growers in Australia." "A fantastic outcome for all people who make it happen - the classer, the stockman, the shearers, the wool handlers".

"Recognition and acknowledgement of all the hard work put into preparing the clip."
 "A positive incentive' and 'encouraging."
 "Fantastic and quite unbelievable, given the competition we are up against. Great for our wool as well as gaining a premium price for the hard work put in over a long period of time."

Tasmanians are rightly proud of the success of the six mentioned wool growers who are maintaining a legacy of almost 200 years of Superfine wool growing in the State.

Compiled by John and Vera Taylor

Below left: Rose Villa award winning bale in the Zegna Superfine Wool awards. Below right: Classing at Kingston. Bottom: L/r: Simon and Anne-Louise Cameron, Kingston. Vanessa and Ian Thirkell-Johnston, Macquarie Hills. front Carol Westmore, Patterdale Middle back Allan and Carol Phillips, Glen Stuart Amanda Grey and Rob Freeman Rose Villa. Sharon and Richard Gee Snowhill and Kooringa at the Zegna dinner in 2019



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ASWGA PHOTOGRAPHIC COMPETITION WINNER FOR 2019/20



Megan Picker of Hillcreston Park, NSW

"The Border"

This photo is of 900 one-year-old sheep coming in for shearing. Although quite cold, we use cover combs and shed our sheep out of the cold when needed.

Having spent all my life working on farms, I love sheep and working with their beautiful soft wool. Working on the wool table at shearing gives me great satisfaction and enjoyment.

I have been taking photos for most of my life and I am very keen on telling the story of a Superfine wool breeder.

We work for perfection and do our best to produce the best wool possible that climatic conditions will allow. I hope to spend the rest of my time in a rural environment.

I love the life of a wool grower and I love Border Collie dogs and Dachshunds.

Megan Picker

THE AUSTRALIAN YARN COMPANY IS WORKING THROUGH THE PANDEMIC

Business for The Australian Yarn Company has been extremely busy with the unexpected demand in these unprecedented times.

Having had to close our mills to the public in March as a safety precaution, our mail order, phone and internet sales increased rapidly. The shop at the mill closed in mid-March, as we believed it was not wise to encourage people to leave home to visit our outlet. The visitors to our shop travel from all over Australia.

The digital segment of our business has taken off and additional staff were employed to ease pressure in the phone sales call centre. The current COVID-19 crisis has given consumers who always wanted to knit but didn't have the time, the opportunity to take up the craft. As well, people who have not knitted or crocheted for a while have taken on crafting now they have extra time. Australia Post is collecting six to eight crates daily of customer order parcels.

Additional staff were employed to meet demand and our staff is working tirelessly, for extended hours six days a week, 24 hours a day, to produce yarn to meet our customers' needs.

The volume of orders that have been received since the beginning of April is the equivalent of five winter seasons worth, i.e. excess of 35,000 orders.

To work our way through the large volume, staff relinquished public holidays and worked longer hours. We are producing between 1,800 and 2,400 kg of yarn every single day through our mills..

Our sales and product development team are currently working on the Winter 2021 range. The design team is developing patterns which are an inspiration to use our yarns. We are so proud to be able to produce the majority of our range here in Australia at both our Bendigo and Wangaratta Mills.

We are truly fortunate that the products and services we supply are helping so many people to cope during this challenging time.

Wayne McMahon

Right: Wayne McMahon, National Sales Manager working in his "civvies" packing yarn in the factory





* Father
Husband
Authenticity Grower
Climate Hero

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JANET BELL

Countrywide Wool Testing

My passion for Superfine wool started twelve years ago when I came to live with Neil Carey and work beside him on the Superfine wool property “Kashmir” in Wee Jasper in the southern Tablelands of NSW. I had arrived in Wee Jasper after purchasing the “Stables Tavern and Restaurant”, a quaint, if not quirky Wee Jasper drinking hole, handy for thirsty farmers and tourists, and I ran this successfully for four years.

The farm “Kashmir” is 9,000 acres in a beautiful valley, with Superfine wool being the main enterprise and with irrigated river flats for fodder. Kashmir has been using micron testing of its hoggets for 25 years and the quality of the wool and sheep are testament to this. The breeding program and the use of micron testing has resulted in it proudly being awarded 1PP bales for two consecutive years.

I grew up with my two younger sisters in a small country town in NSW, where we could roam the town and outskirts, creating our own adventures, sailing, bushwalking, bicycling and riding horses. My teenage years were spent on a girlfriend’s farm, working in my holidays helping with their sheep and cattle. I also worked three days after school as a dental nurse for another girlfriend’s father.

After finishing school, I commenced my nursing career which has led me down some amazing paths and I still love my job to this

day. Nursing has allowed me to work in many disciplines, such as IVF, neonatal intensive care, midwifery, community nursing and aged care, all over Australia and overseas.

I have two children, both remarkable men who have made wonderful and successful lives out of the International Downhill Mountain Bike industry. My eldest, Bryn, lives near Seattle in the US and raced in the world Cup circuit with his wife until retirement three years ago. He is now a professional photographer within the industry. My youngest, Rhys, builds award winning tracks and is currently in Cairns project-managing new tracks from Palm Cove to Port Douglas. He and his wife have two delightful and active girls.

I pride myself as being someone who rolls up her sleeves and is willing to put my hand to anything. The farm is a busy place as we all know, with an endless list of tasks and emergencies to deal with.

I learnt to drive old and new tractors, starting on “Old Sally” (having limited steering capacity) rolling behind Neil in “Sally” while seeding the paddock, graduating to loading bales on semi-trailers. I mustered the “Hills Of Glory” by foot and quad bike, and I was always the last station on the lamb-marking cradle, with my sensitive bedside manner reassuring the lambs and explaining to them the process of the vaccinations and post-op period! We also coated sheep, aka “sheep wrangling”, three to four times a year.

Shearing and crutching were also new to me, with getting to know the shearers and their

wonderful idiosyncrasies and language always interesting. I enjoyed learning how to throw and skirt a fleece and mucking in with the shed staff.

In 2014, the industry was in a slump with prices and the market fickle. Re-evaluation of goals was needed and Neil and I took up an offer to teach sustainable farming in Tanzania. Whilst there, I worked as a Midwife and Nurse in the dispensaries (Clinics). It gave me great insight into how a major percentage of the World’s population lives and also how they face great tragedy and difficulties and yet have an amazing outlook on life, enjoying the moments, with singing, dancing and laughter. It put a different perspective on our struggles here in Australia.

Having worked with the annual testing of our hoggets for many years, the owners of the OFDA 2000 Fibre Testing machine, Paul and Lorna Vallely, became close friends. I was offered a chance to work part-time as a data technician, analysing the measurements of the wool (the machine being developed by a very smart cookie in Perth). His company has a number of machine types and he has since sold a prototype to Elon Musk for the space business. Mark, the owner is a great resource for me, providing me with advice and technical assistance.

The Vallelys relocated to Ireland in 2018 and I became the proprietor of Countrywide Wool Testing in Mid-2019. Alongside acknowledging the benefits of scientific wool analysis as a tool for the farm’s breeding program, I have become passionate about the ability of the OFDA 2000 to accurately measure wool. My ability to interpret the results gives wool growers another means to enhance their breeding programs and achieve a better clip.

The wool industry and Countrywide Wool Testing have given me the opportunity to meet some wonderful people, make good friends and, in return, they have taught me farming, wool and sheep. I love working in the sheds knowing that I am value-adding to the overall farm performance.

I have seen firsthand the vagaries of the industry, the highs and lows, exposure to the fluctuations of markets and the lack of ability of the growers to assert prices that they deserve for growing the most beautiful product. I have also seen how the industry has become more efficient, with the use of technology such as electronic tagging, apps, software, study of genomics and of course, fleece measurement.

I am proud to be part of the wool industry and am looking forward to being involved in its future successes.

Janet Bell



LESLEANN WATERS

Edington, NSW

I have been asked to write about my life as a woman in the Superfine wool arena. Oh dear, this is where everyone finds out all the things I don't know about the industry, since my role in our partnership, Edington Merinos, has definitely been a "behind the scenes" one.

When I was young, I was known to declare to my siblings that when I was grown, I would never marry a farmer. Growing up on the land with six sisters and two brothers, our family seldom had a holiday. My parents owned a farm in the Southern Tablelands of NSW raising sheep and cattle. Dad was also a shearer and a potato grower whilst Mum assisted and raised the children. My parents encouraged us to be educated and independent. I trained as a nurse and specialised in Midwifery. I currently work two part-time positions for Hunter New England Health, in the Armidale hospital maternity ward and as a midwife in the community. This role is a specialised position providing antenatal and pregnancy care for Aboriginal families.

Mark and I married in 1989 at which time I was working at the Armidale Hospital. At that time Edington was quite different to what it is today. Mark, his brother Brett and his parents, Ken and Deirdre were partners in the business. The Merino flock was from local bloodlines with a small Border Leicester Stud.

Breeding Merino sheep to produce ultrafine wool is not exactly a skill that I have mastered. It is my husband, Mark, who has dedicated his life and career to develop the flock and Edington Merino Stud. To say it is an obsession would not be wrong. It has taken Mark a lifetime of hands-on learning, handling sheep and fleeces, to know what ram is needed to join with what ewe to produce offspring that will grow a fleece of quality. It is definitely a speciality skill.

In the mid 90s the flock was transitioned to follow Dr. Jim Watts SRS methods (and as a consequence the use of Glanna bloodlines), with the purchase of fifty stud ewes, to begin our current Merino Stud. During this time, I was enrolled in a TAFE Rural Office Management course as I took on a greater role in the accounting side of the business. Shortly thereafter, the existing partnership was dissolved following a long Family Succession process, endeavouring to satisfy the needs of all partners. Mark and I retained the Edington Stud which Mark has successfully continued to develop until this date.

I consider this period of my life to have been the most stressful due to the above pressures, drought, high interest rates, the GST



introduction, the birth of our three children, 2 mid-pregnancy miscarriages, major head and neck surgery to remove a parotid tumour, whilst still trying to work and keep the farm accounts not to mention keeping my sanity, marriage and sense of humour. I am sure this is a life that many rural women can relate to. Farming is a great lifestyle, but is extremely hard work and can be stressful on a family. As a stress relief, I indulged my passion for gardening and plant propagation at every opportunity. As the children grew, to increase my agricultural knowledge over a number of years, I completed a Diploma in Organic Agriculture.

I always smile when I hear it said - that to be a successful farmer you need to be backed up by marrying either a schoolteacher or a nurse. I must admit that in all the years of our marriage, we have more than once had to rely on the cashflow of our off-farm income to survive. The recent prolonged drought utilised more than three times my total annual wages

from Nursing, just to provide fodder to keep the flock alive.

As Mark's success and prize-winning Superfine fleeces increased, so did the associated social and travel opportunities which we have enjoyed together. The opportunity to promote wool and wear quality woollen garments has encouraged my hobby of clothing design and creation. I must admit to enjoying the challenge of sourcing quality wool fabrics to sew a new outfit for each occasion.

Farming life is fulfilling, ever-changing and somewhat unpredictable. Even given the most recent drought, bushfires and my breast cancer diagnosis, all of which we have survived, we would not change our choice of lifestyle. We are proud and grateful that our partnerships both marriage and business have endured these hardships and rewards.

Lesleann Waters

SUSTAINAWOOL: SUPPORTING EXCELLENCE

SustainaWOOL continues to grow and develop.

The apocryphal curse is 'may you live in interesting times'. For all of us in the Australian wool industry, the combination of widespread drought, bushfires, Talman ransomware attack and COVID-19 made for an 'interesting' twelve months since publication of the 2019 ASWGA Annual.

It is against this challenging backdrop that we can report that SustainaWOOL Integrity Scheme has continued to grow and develop, in the service of both buyers and sellers of wool who wish to celebrate excellence.

Building on the tremendous foundations laid by SustainaWOOL's founders - Successori Reda, Vitale Barberis Canonico and New England Wool - much has been achieved in the past twelve months of industry operation through AWEX.

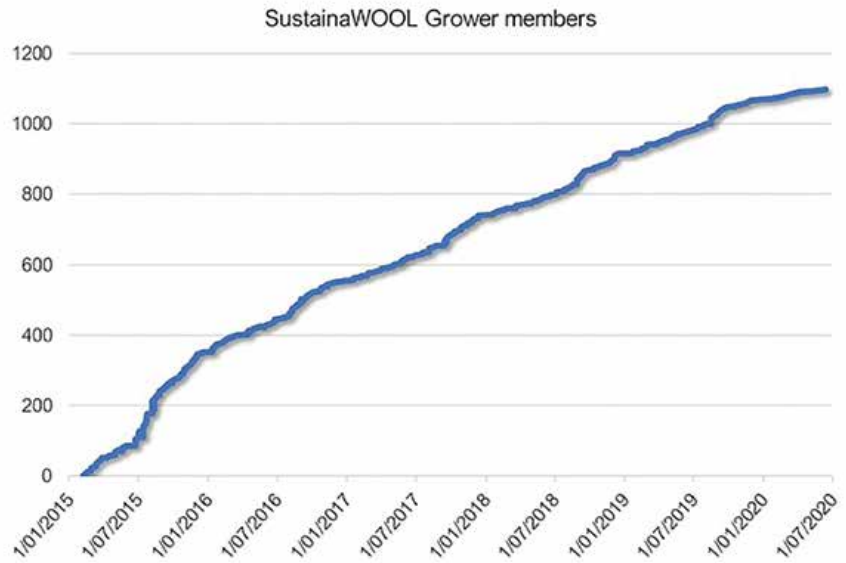
Industry ownership – the transition from private to industry operation has been successfully completed and SustainaWOOL is now operating on a cost-recovery basis through AWEX. The introduction of fees for growers has come at a difficult time for many and we have lost members who refuse to pay for the service, or who object as they confuse AWEX with AWI – which does receive the wool levy!

ISO Certification achieved - On 15 January, AWEX achieved ISO9001-2015 certification for SustainaWOOL through Global Compliance Certification Pty. Ltd.

This is a key element of assuring the integrity of the scheme and supporting international recognition.



Continued growth – SustainaWOOL recently welcomed the 1,105th successive grower member and our 18th Supply Chain partner. 65% of new grower memberships in the past 12 months have been SustainaWOOL GREEN accredited (non-mules/ceased muled operations).



Higher standards – As part of our drive to improve our quality systems, we have intensified our farm auditing rate to 20% of accredited grower farms inspected each year. However, this is weighted so that new members have an 80% chance of inspection in the first 2 years of accreditation.

Improved traceability – in April we completed development of the new SustainaWOOL Content Claim standard. This has been an important development to provide the needed guidance for partners wishing to use the Scheme logo to describe or promote their products.



SustainaWOOL™ Content Claim Standard | 1.0

Improved digital accessibility – since October, the SustainaWOOL website (<http://sustainawool.com.au>) has been the readily accessible hub for all things SustainaWOOL. Readers can use this site to download forms, access news, see our expanding number of supply chain partners, and renew accreditation.

New Stencil - our supply of the original stencils ran out at Christmas time, and we've designed and sourced a new Australian-made version – thicker and more durable (1.9mm vs 1.4mm), and simpler and more legible (consisting of the 'swirl' over the word 'supplier').



New developments in train

While much has been achieved, there is much to do in building SustainaWOOL, especially in terms of international recognition.

Firstly, we are in the process of establishing the SustainaWOOL Consultative Committee, comprising a small number of accredited SustainaWOOL growers and Supply Chain Partners, as well as other experts. The Committee will provide an important review and advisory forum for the Scheme, assisting with planning and performance review and operate within defined Terms of Reference.

Secondly, we will soon be offering SustainaWOOL growers an opportunity for a higher tier certification, including annual farm inspection and audit. A number of members have already expressed interest, reflecting their individual business practices and ethos.

Finally, we will soon be releasing the next iteration of the SustainaWOOL Grower Declaration. In keeping with the need for transparency and also to deal with technological change, the updated version will allow growers to specify additional detail about their method for breech modification and for provision of pain relief.

AWEX WoolClip Update

WoolClip is a free, flexible and user-friendly App & web tool, which allows the user to create mob & wool bale details, specifications and NWDs on farm and distribute both data and pdf copies to their broker of choice.

WoolClip has an easy to use intuitive workflow, designed to reduce errors and workload and the smartphone app can be used to collect Mob and Bale details in the shed, even where there is no signal or data connectivity.

To the end of the 2019-20 season, WoolClip processed 67,070 bales and the cloud-based platform has experienced no downtime since going live.

WoolClip is also eBale ready, allowing for greater traceability from farm through the supply chain.

The feedback we are receiving from growers, classers and brokers has been very positive. WoolClip is gaining momentum by increasing efficiencies in the supply chain, by significantly reducing errors, increasing transparency and confidence in the integrity of wool.

With WoolClip you are in control.

New features

There are several new features that have recently been released, including a Farm to Warehouse Consignment Module, a National Wool Declaration update and an upgrade to the Wool Classer Clip Inspection and Classing Activity Summary.

WoolClip Training and Support

User training is available 7 days a week and is usually performed over the phone. Training is free, and provided to classers, growers, brokers, and shearing contractors.






To learn more about WoolClip, or to organise a WoolClip training session, contact AWEX by:

Phone: (02) 9428 6170
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ALBURY WODONGA REGIONAL REPORT

What a difference a Year makes. We have seen so many changes occur since our last Annual that it is difficult to know where to start. But it seems to me that we have had four major factors that were outside of our control to consider.

Firstly, we have seen considerable volatility in prices being paid for greasy wool. Overall, the prices had been a bit better, but future wool prices are far from secure. Global trade disputes are not helping us here.

Secondly, during the second half of last Year, our region was still very much drought effected and then came the fires. Thankfully, our branch members appear to have escaped being burnt out, but we were all "on our toes", as there were several significant fires in our geographically

Below Stuart Drinnan of FibreFine Merinos - winner of the ASWGA Fleece Competition in the Albury/Wodonga Region



extensive region; near Albury, through North-East Victoria and of course, Gippsland. The smoke became a constant feature

Thirdly, this Year we have had some positive news; most areas of our region have seen some significant rainfall totals. At Benalla, we have had the best Autumn break in my memory and with less run-off than expected, we have even had some recharge to sub-soil moisture; about time. Too late to save some of our trees, but most welcome nevertheless

Fourthly, as we all know, the disruptor of all disruptors emerged; a global pandemic, in the form of COVID-19. The immediate effects have been drastic and it seems as if, moving forward, all bets are off. What the short-term, medium-term and long-term ramifications will be are far from certain. One positive that has come from the pandemic, is that there seems to be more and more people that are seriously examining their future as consumers and there is a significant proportion that are moving away from fast-fashion, one of our nemeses. Any moves in this direction can only benefit our industry; let us hope that this move continues.

I must congratulate Andrew and Stuart Drinnan and families, from Fibrefine Merinos, who have again won first place in the ASWGA Fleece Competition for the Albury-Wodonga region. Stuart is photographed in front of a memorial to Eliza Furlong, co-founder of Saxon Merinos, near Euroa. I would also like to congratulate

all winners from all regions, as well as the overall winners. Well done to all concerned.

Our branch AGM was small in number and was conducted via teleconference. We have come to the sad conclusion that because of the difficulties we encounter due to the peculiarities of our region, we are not sustainable as a branch and that we will disband the Albury-Wodonga branch of the ASWGA, with our members choosing which existing region they will join once we have officially disbanded. I am confident that our branch members will be welcomed with open arms and I hope that they enjoy interacting with fellow Superfine breeders.

Given that we have made a decision to disband, the Albury-Wodonga branch of the ASWGA decided to leave our office bearers unchanged, to oversee the transition process. Once again, I must thank our President, Danny Picker, for the effort he has put in, the support he has given me throughout the year and his help with what has been a difficult decision making process.

Finally, I want to again express my gratitude to Melissa Mulley, whose ongoing help I have found invaluable, both as regional chair and as editor of this Annual. Thank you Melissa; you make the very difficult easier and the improbable possible.

Dr J. W. Gill
Albury/Wodonga Regional Chair

MUDGEE REGIONAL REPORT

As with most regions, this last year has been very trying for members, with devastating droughts, bust fires and COVID-19. By February 2020, there was little to no water in dams and no paddock feed, so livestock was handfed. Luckily, we started receiving good rain from February. The rain was a great relief as now dams are full and we are not worrying about how to transport water to the stock. Paddock feed is starting to grow - however, it's very slow. Most have ceased handfeeding with a few still feeding lambs.

Ongoing issues which are affecting Merino numbers in our area and which we have seen over many years is that properties have been sold for recreational blocks. New owners no longer stock Superfine Merinos and thus there has been a steady decline in our area. We also see problems with exotic breeds roaming wherever they want, with absentee owners not keeping up maintenance to their properties. Wild dogs are still an ongoing concern with

sheep loss to dog attacks still occurring regularly. Wild dog control is still strongly maintained.

Wool from last season was mostly sound and VM fairly low. Sheep in our area look to be in good condition, with wool having little VM and we cross our fingers that most wool will be sound, though it's hard to tell yet.

With everything that is happening around the World, the wool market, unfortunately, does not look like it is going to be in the wool grower's favour. As well, with the high price of sheep for mutton etc and re-stockers, there has been a tendency for growers to unload stock to survive financially.

The future isn't looking too rosy for wool growers at this stage.

Murray Price
Mudgee Regional Chair



Feeding sheep through the drought

ARARAT BARUNAH REGIONAL REPORT

The past twelve months have seen the Ararat Barunah region enjoy very good seasonal conditions. We have been fortunate by the season breaking at the end of April last year after a very dry Summer. With good rains continuing, this enabled good Winter growth, which continued on into the Spring with good feed levels generally across the region. The Spring allowed good rains giving good feed levels into Summer. The level of feed has proved very helpful in off-loading stock in good condition and for those breeding or selling fat lambs.

The crops in the regions provided good amounts of grain which was helpful to those selling and also provided good levels for feeding. Although patchy at first, from February on, rain started to drift across the region and by March/April a general break had occurred allowing good growth through the Autumn. On many properties a much smaller amount of hand feeding has been required than usual though continuing to grow through June as the Winter sets in.

It has been a very strange year with the world turned upside down with COVID-19 crisis. In many ways, we have been fortunate to have life continuing with some normality in its quiet way on our individual properties while many in the world have had tumultuous changes to their lives. In the end though, the effect will drift our way even if only in the market level for wool.

Congratulations must go to Noel Henderson who was successful in his election to the Board of AWI. It was a wonderful achievement to attain this position and is obviously a reflection of the respect and regard Noel is held in across the wool industry. We wish him all the best as he helps the AWI Board navigate the journey ahead and indeed set a course where wool can flourish.

Duncan and Jess Barber from Coliban Park have certainly enjoyed a very successful year. Earlier in the year they won the prestigious Barberis Clip Award. This is in recognition of the type of wool they are producing which is regarded by the Barberis Company to have all the attributes of quality and performance that lead to a superior fabric being produced. It is a wonderful effort to have a member from our region leading the way in wool production across Australia.

This was further reinforced with the Barber family winning the Farmer of the Year Award and once again, based around their entire farming enterprises, the productivity, production, quality and management of their operation. No doubt a wonderful achievement and our sincerest congratulations go to Duncan and Jess.

It was pleasing to see our members doing well in the Australian fleece competition. Russell and Penny Hartwich of Kelsedale winning the Extra Ultra Fine section and Stephen, Heather and William Reid, of Kooringa winning the 14.5 micron and finer section. The Reid family also enjoyed success in the Vellus Aureum Zegna Competition, finishing a very credible fifth, which is a wonderful achievement.

On a sadder note, this year has seen the passing of two of our founding members in Robert Beggs AM and Graeme Phillips. Both men have served the Ararat Barunah Branch for a long period, always with the best interests of Superfine wool at the forefront. Robert served as National President and on Council for many years with Graeme one of the staunchest members in the Ararat Barunah group. Their passion and love for our Association will be sadly missed and our thoughts are with their respective families.

The market is continuing to find its own level

amid the current crisis that has engulfed the world. We can only trust and hope the quality of the fibre allows it to end up in a position that allows a justifiable reward for its attributes. The current price for meat continues to be very, very helpful.

Thanks to Russell Hartwich and Tom Spielvogel for acting as our Representatives on Council throughout the year and to Penny Hartwich for administering our Region. As always, I would like to thank Melissa for her continued efforts within the whole Association. They are integral to its continuation. Thank you to Danny Picker for his leadership during his term as President. Danny is highly regarded and respected across the industry and this has helped him steer a steady path through many situations.

Geoff Phillips
Ararat/Barunah Regional Chair



Russell Hartwich presenting Geoff & Heather Phillips with their plaque for 1st Place in the Ararat/Barunah region in the ASWGA Fleece Competition.

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GOULBURN YASS REGIONAL REPORT

The Southern Tablelands and Monaro have had, like so many other areas, a varied year to date. At the present, many parts of our region have encountered the best autumn break in many seasons. Winter feed crops are getting away and now being fed off as I write. However, the less fortunate areas have received a very ordinary start to the Autumn and the Monaro is still feeding again after four years of doing so. The weather forecast is for an above average wetter Winter than usual across our region, which is happening as I write.

The wool produced in our region has again been of the best quality, although some lesser yielding lines due to the drier year have still met strong competition at auction. There are concerns among the local growers about the Autumn break – this may have a detrimental effect on the tensile strength of this year’s clip.

Prices for quality stylish lines were off the highs of the previous year levels, however they did meet with growers’ reserves at auction. As the selling season moved past the New Year, a number of growers have quantities of their best lines of wool in storage awaiting better prices to return – then COVID-19 hit the market.

A number of issues affecting this region have been exacerbated by the virus shutdowns, the bushfires, the ongoing drought, high feed prices and the variable wool prices. All these have placed pressure on the specialist woolgrower. The COVID-19 issues have hit the Italian wool processing area hard and has raised local growers’ concerns about the pending spring selling auctions. Together with the record high prices for mutton and lamb, many lines of future woolcutters are

being sold at SELX and Auctions Plus. The prices received for these young sheep are very high considering their possible returns for wool at the September Sydney sales. The record high prices for both lambs and mutton is placing pressure on the long-term viability of a specialised woolgrowing enterprise. It is expected that the Spring Superfine Merino Ram sales will be very difficult under the current industry issues.

To the highlights of our region;

- John and Robyn Ive of Talaheni winning the ASWGA Goulburn Yass Regional Fleece Competition 2019
- Neil Carey and Janet Bell of Kashmir receiving a 1PP accreditation for a bale of Ausfine Ultra 14.2 um achieving 5070c/kg greasy. This bale achieved the 2020 seasonal record greasy price.
- Brett and Sue Picker of Hillcreston Heights received two 1 PP accreditations, one bale 15.1um and a second bale of 15.4 um. Both bales went to the Reda Contract with New England Wool being the buyer.
- Danny and Megan Picker of Hillcreston Park winning the ASWGA Goulburn and Yass Regional Fleece Competition for 2020
- Danny and Megan Picker and their son David and family achieving 2nd and 4th places in the Zegna Vellus Aureum Trophy 2020.
- Brett and Sue Picker of Hillcreston Heights gaining 8th place in the Ermenegildo Zegna Wool Trophy 2020.
- Brett and Sue Picker of Hillcreston Heights were the successful applicants for funding of water infrastructure on their (omit the) property at Bigga - from the Zegna Company. The bore has been drilled and piped and is delivering much needed water to the property.

Then to the lows of this report where one of our member’s property was burnt out during the January bushfires on the Monaro, with total loss of their stock. The grass has since returned but the recovery will take a long time.

Social events

Late November saw a gathering of membership to Euralie near Yass for a Sunday afternoon luncheon of many dishes provided by members and a few wines and a friendly talk. A great afternoon was had by all. Many thanks to Paul Simons and Lyndall Eeg of Euralie for their kind hospitality.

The evening of Saturday, 19 November saw a large number of members of the Goulburn Yass ASWGA and Authentico members met in Goulburn to meet Schneider’s CEO Jeffery Losekoot and the other Schneider Group members for an update, drinks and refreshments. A most enjoyable evening was had by all who attended.

Then in late January Tim Marwedel hosted (along with Danny Picker) a delegation from Japanese Wool processor Nikke Japan. The group travelled to Neil Carey and Janet Bell’s “Kashmir”, Wee Jasper for a property inspection and then on to Danny and Megan Picker’s Hillcreston Park property the following day. The Nikke Group has now joined the ASWGA.

This season has shown that growers of this elite fibre must have adaptability in their toolboxes to be in a long term financial position to grow Traditional Superfine wool and make a profit.

Neil Carey
Goulburn/Yass Regional Chair

Paul Simons, Lyndall Eeg and David Simons sporting their new ASWGA “Euralie” workshirts.



L/R Danny Picker, Lorna Vallely, David Bell, Paul Simons, Barbara Bell, Ian Cathles, Helen Cathles, Lyndall Eeg, Janet Bell, Neil Carey, John Ive, Robyn Ive & Aidan Stannard





Above: Andy Raeber of New England Wool and Simon Hogan of Elders with 2 1PP bales from the Linke Family

HAMILTON REGIONAL REPORT

The Western Districts of Victoria had a good Spring in 2019 leading into a hot January and a cool to mild February-March. Some areas had rain in the end of March, leading to an early Autumn break. The areas further towards the South Australian border had to wait until mid to late April for their break. The cropping programs in the area were completed on time and are looking very good with no water logging, and spraying programs were completed on time with urea going out with ease in the dryer than normal conditions. Pastures are growing even though Winter has been colder than normal with more frost but we are not waterlogged which has made a big difference. Some pastures are showing nitrogen deficiency but with some warmer weather and rain in the Spring this will grow out.

The sheep are doing well in the area; our wool cut from our Spring-shorn sheep look like they will be the best we have had for two or three years, and the dust has not penetrated as far as it had in the last four or five years. The nkt are still unknown, but the Autumn-shorn clips were not as sound as they have been in recent years. Autumn lambings are going well, with the amount of feed around the growth rates should be good, leading to some heavy 1st and 2nd cross suckers in November. The number of Merino to Merino joinings around Hamilton are continuing to fall, and the amount of 70s and finer rams would be falling even quicker. Winter lambing xb ewes lambed well with some very high percentages.

COVID-19 has had a small impact in late April and May, changing the way we get supplies and interact with employees and contractors (I did not have to teach the 6 and 8 year-olds for six weeks - thanks Vic). The second lockdown and compulsory masks in July and August are causing more problems especially in sale yards for store sheep sales, abattoirs and

ram sales. All field days have been cancelled along with sheep shows, and there changes to wool auctions. Shearing in the Spring in Victoria may be a problem with few shearers coming in from New Zealand or other States.

The members in the Hamilton area have had good success this year with the

- Linke family (EML Glenholme) having two bales classified as 1PP.
- Photo of Linke's bales
- David and Susan Rowbottom (Rowensville) taking out the Vellus Aureum Fleece competition for the sixth time, and third place to Aaron and Rebecca Rowbottom as well.
- The Venning family (Kilmarnock) won the Hamilton region of the ASWGA Fleece competition with the second-placed 80's section fleece.



Sam, Will & Mitchell Venning with fleece comp plaque

Thank you to Danny Picker for his work running the Association for the year and to Melissa for her oversight.

The future of Superfine wool??? The meat price has been high for a number of years now.

The wool industry had three years of relatively good prices (for which we are very thankful) and have been trending down now for two years. In this area, wool is uncompetitive compared with all other rural industries. We have been getting good meat prices to help support the wool income, but a prime lamb enterprise will return 30% more gross profit than a wool enterprise per Ha. So more people are turning more Ha over to prime lambs. In the 2008 Annual, Merv Mibus wrote about the changing trends in the sheep and wool industry - a lot of it has come to pass. In our region, there are less family farms running Superfine sheep and preparing the wool to the standard of even twelve years ago. Like the loss of 21 to 24 micron wool in the 1990s, will the 2020s see the loss of production of 15 to 17.5 well grown and prepared Superfine wool? Will anyone care? In Giovanni Schneider's presentation to the IWTO in May this year, he made a statement about the cost of a woollen sweater in a retail store some fifteen years ago and this year - from \$450 to \$1000. The mark up between the sheep's back and the consumer's back on a \$1000 sweater is large, something the wool industry needs to look at. If we cannot grow the wool at a profit, sooner or later we stop growing it and then it cannot be processed.

On a positive note, wool growers in the Western District of Victoria may have an easy time meeting carbon standards with our longer seasons and wetter climate. In closing I hope the ASWGA can work together to bring a unified and profitable industry into 2021. We can all stay safe until a vaccine is found for COVID-19 and the world moves on from the pandemic.

Bradley Venning
Hamilton Regional Chair

SOUTH AUSTRALIA REGIONAL REPORT

To say the last year has been interesting would be a huge understatement. In many ways South Australia has been no different from the rest of Australia, but it still has a local impact.

2019 goes down as one of the driest years as far as rainfall goes; depending where you live has a little to do with how we all fared. For us in the Adelaide Hills, it was about timing of the rainfall. After a terrible Autumn, the season got off to an OK start and we enjoyed good growth whilst the ground still warm. Lambing went ok for us as we lamb a fraction later than many in the area in late May and the feed offered a little more to the ewes. Unfortunately, a lot of properties did not enjoy great percentages.

The Winter was not overly wet and we all failed to catch water for the second year in a row, which saw a lot of low dams. This meant that many farmers were forced to cart water onto properties quite early into the summer. Hay cuts, however, were up on the previous year for a lot of us - ours nearly four times, more from good fortune than anything, 20 mm rain days after applying hay boost fertilizer did the trick and thickened the hay right up, thankfully as most of us were nearly out or right out as thousands of tons of hay trucked in to the State during the year. Some decent crops were also appreciated. Prices were also firm for stock sales and wool which helped lift morale.

December then saw the devastation of bushfires - Adelaide Hills and Kangaroo Island were the two prominent ones in SA. Heartbreaking stories all over the country and no different here, many houses and

thousands of animals perished, really hit home to many people. The fires also affected the grapes due to smoke taint and very poor crops in the Barossa and other regions also not helping. Seeing people helping each other clean up and start the rebuilding process gave heart. Unfortunately, we are still hearing stories of battles with insurance claims etc many months later.

Christmas had a different feeling, that's for sure. Then not far into 2020 COVID-19 makes its mark on our lives and we all know about that. One thing I will say is on farm, things as per usual, only when you step off farm you notice it e.g. having kids home off school etc. One thing I did enjoy was not having to go out at night - got very used to that.

2020 season-wise has been - again not overly wet yet, but not overly cold either so seeing some decent growth. Lambing is going well - numbers good, lots of multiples, seems to be the usual comment around the place. Unfortunately, don't have to go too far to see the other side of this. Some pastoral properties have had hardly any rain and devastating lambings, so hoping this can change.

With a bit of luck, the Winter will be wet and we can fill the dams and get some decent rain around the State, get some normality back to life and see wool prices climb by Christmas. Also, that we can return to some kind of normal.

Nick Seager
South Australian Regional Representative

TASMANIAN REGIONAL REPORT

In these challenging times and the 73rd year of the Tasmanian Fine Merino Breeders Association, I am pleased to present the region's report.

Before any other comment is made, we need to recognise two larger than life characters of the true Tasmanian wool industry who recently died. Between them, they must have clocked up about 150 years' contribution. Firstly, Des Manning, Mienna, in the Southern Midlands, always a believer in "Saxon" Merinos, and who at the age of 90 (with a bit of help from his family) took out the VBC Wool Excellence Club Award. Secondly, Tom Talbot, who commenced in the industry in 1947 and continued his involvement until shortly before his death. Tom classed sheep and wool for two generations in my family's case and possible three for some others. Like his knowledge of wool, his enthusiasm for our industry was surpassed by few. Des and Tom will be missed by family and friends alike.

The year just completed has been unlike any other in the life of the Association - drought, fire, rain and pandemic. In spite of this there were some very notable achievements.

I nominate Allan and Carol Phillips as the most decorated growers of the ASWGA this year winning the Ermenegildo Zegna Superfine Wool Trophy Award, producing four 1PP bales (out of ten for the whole of Australia), and in the ASWGA Fleece Competition winning the 90's Category and the Tasmanian Regional Section. Sam Nicolson, Bonneys Plains, won the Reda Future Project Award for the clip of the year, for best quality and most quantity. Shelley Saunders-Cocker and Chris Cocker, Barega, have developed ground-breaking links with the new American online women's wear venture, Another Tomorrow. Anna Cotton continues her impressive involvement with the wool industry and was featured in a recent IWTO publication on "Young Professionals". Vera Taylor is again putting pen to paper on Tasmania's rich wool history. Georgina Wallace continues to excel with the Grand Champion Superfine Merino ram at the Australian Sheep and Wool Show. In addition to Glen Stuart, Patterdale, Rosevilla and Kingston were Ermenegildo Zegna finalists. The list goes on.

Before COVID-19 curtailed activities, the TFMB was able to provide members with a meeting with George Shen (owner of the wool processing company Diyang Merino) and Jimmy Jackson. We were also active in supporting the Roberts/Schneider/Authenticco



function in Launceston. In November, we hosted a dinner for Emanuela Carlotti from Loro Piana and Claudio Lacchio, from Italian wool trader CL7. This function allowed Emanuela and Claudio to meet growers who had not been included in the broker schedules and reinforced the direct communication between TFMBA/ASWGA and the Italian wool industry.

Luke Rapley is representing the Stud Merino Breeders Association of Tasmania on AWI's Wool Grower Consultation Group (WCG). The Group's main project, Wool 2030 – A strategic plan for Australian woolgrowers is to be finalised by November 2020. I am also, via the TFGA, a member of the WGC.

Based on AWEX data, Tasmania is leading the nation in terms of the number of clips that fit the non/ceased mulesing category. The State now has about 13 RWS-accredited growers, with at least three members, Barega, Bonneys Plains and Winton, amongst their ranks.

Three properties, Fosterville, Bangor and Kingston (two TFMBA members and one former member) participated in a natural capital report pilot program. In all three cases the assessment was well below the industry benchmark for greenhouse gas emissions - a tribute to their enterprises and land management systems. Lower greenhouse gas emission production may be another feature of

wool grown in Tasmania that we must turn into a customer benefit.

There are also more sobering matters that need to be highlighted. The State's wool industry continues to shrink. The uncompetitive position of wool, compared to other agricultural enterprises, has not helped. Based on AWTA data, Tasmanian production declined by 16% to about 40,000 bales for FY20. This decline is in addition to 12% the previous year. It now represents 2.4% of the total Australian clip. On the positive side, its quality as measured by yield, VM, staple strength and hauteur, continue to lead the country.

The price for our fibre, already shaky, went into freefall in March and is now half what it was in August 2018. The collapse in the price will test even the true believers. It is up to us to focus on making our product more competitive than wool from other sources, to maximise our position in a difficult market.

It is important to note that Tasmania is fortunate in having an increasingly competitive broker environment and one that has embraced the importance of customer communications. In a very short time, newcomer Wool Solutions has won a significant market share. It is also supporting our industry through assistance to TAFE for wool classing training and working to improve

access to the Responsible Wool Standard (RWS), the accreditation system that is now delivering a price advantage to growers. Roberts/Nutrien, with its Natural Tasmanian Wool initiative and link with Authentico, is offering to help growers add value to their clips. I would urge members to make sure they are able to access the best their respective broker is able to offer. AWN has its channels to assist growers as well and I believe we will hear more in the near future.

In closing I would like to thank Marie Boadle for her work as secretary and the other members of the committee who assisted when called upon to do so and represented the Association from time to time. I would also like to thank those members who have supported the ASWGA by participating in events such as the Ermenegildo Zegna competitions and its own fleece competition.

Simon Cameron
Tasmanian Regional Chair

Below: Melanie and Sam Nicolson of Bonneys Plains, winners of the Reda Future Project Award for the clip of the year, for best quality and most quantity with Francesco Botto Poala (left) and abrizio Botto Poala (right)



NEW ENGLAND REGIONAL REPORT

The past year in New England has been one of massive contrast. The first six months saw a combination of the drought which could be described as catastrophic and relentless. It covered all of 2018 and 2019 and according to most old timers, it WAS the worst ever. Areas around Walcha, Uralla and Armidale measured under 200 mm for the year where the previous lowest recordings were above 400 mm.

Many bushfires started in the Spring, mainly in the east. Much damage was caused to fences, sheds, yards etc but very few ASWGA members were affected. If the wind blew from the east, we were enveloped in thick smoke but if the wind blew from the west, we only got thick dust. Unfortunately, most of the dust was caught in the fleeces.

Then the change!!!!!! Good rain in January and March (although our slightly-to-the-west members didn't see the rain until February – with January being one of the hottest and dustiest months on record, straddling a very wet February. (A few growers had measured more rain by Australia Day than they'd received for all of 2019.) This led to phenomenal grass growth and recovery due to constant rain, extended natural fallow and very low stock numbers. And with the grass came the weeds...

Feeding continued for the rest of 2019; same as for 2018 with breeder numbers further reduced. Lambing percentages were mostly terrible with a few exceptions. The amount of money spent on food/grain was huge. Combine this with most growers having less than half normal stock numbers means the

recovery from drought will be very long and difficult. It may take many, many years for numbers to get back to pre-drought stock numbers and cash position.

Now we have the COVID-19 pandemic to work through. This has affected many lives, businesses and ways of life. The faltering wool market is just one of these, and it will put more pressure on SF numbers. COVID-19 has also resulted in the cancellation of the Sydney Royal Easter Show as well as Australian Sheep & Wool Show in Bendigo and SheepVention in Hamilton, all of which are well supported by the New England members. Social activities such as the Zegna Competition presentation was cancelled. The Annual Dinner/Seminar/ Farm Tour was to be held in Mudgee – postponed, and possibly even cancelled. We are probably frustrated with this situation and can't wait to do the simple things – Field Days, Ram Sales or simply a BBQ.

Ram Sales in the Autumn were quite subdued. Clients still have rams but fewer ewes. Most sales reported a reduced clearance and sale average. Although poor results for Stud Breeders, some growers managed to collect some pretty handy rams at below market value prices. Stud rams reached \$11,000 at the Armidale Stud Merino Sale.

The Zegna competition winners were announced and David and Angie Waters were awarded 4th place and Clive and Margaret Smith placed 6th. Both families are to be congratulated for their performance in a very challenging year.

The ASWGA Fleece competition winners were to be announced at the Dinner/Seminar weekend in Mudgee. This event was cancelled due to COVID-19, so all the winners were presented with their awards at regional level.

New England growers David and Angie Waters exhibited the best 80's quality fleece which was also the best for the New England region. This fleece ultimately won Grand Champion fleece with Mark and Lesleann Waters winning the 74's quality class. Congratulations to all.

Cathy Hayne & Mark Waters
New England Regional Chair & Councillor



Above: Mark & Lesleann Waters - winners of the Class 74's in the ASWGA Fleece Competition
Below: Congratulations to Angie & David Waters for taking out the "Cleckheaton Grand Champion" Fleece trophy in the ASWGA Fleece Competition



WESTERN AUSTRALIA REGIONAL REPORT

The wool growing areas of WA have been through a very long dry Summer after a year of very low rainfall. Summer feed was short but of good quality, resulting in the sheep being in good condition, providing supplementary feeding was adequate. Hand feeding has almost ceased in the Southwest, but rains have been patchy further East and North. Feed reserves are now running very low and will be critical in some areas.

Huge dust storms at the end of April mainly affected coastal areas, but some wheatbelt locations had devastating wind erosion when rain did not come before the wind storms. Some freshly seeded paddocks lost a few centimetres of loose topsoil along with seed and fertiliser and needed reseeded.

Areas between Albany and Esperance have been very dry for the last three years and many farmers are carting water. However, on 3 August, good rains fell in this area, the best for three years and more is forecast - a huge relief for the most drought-affected part of Western Australia.

The dust storms in late April and early May

made wool from Autumn shearing extremely dusty, with very high VM. Good rains in May gave good germination, but extremely low subsoil moisture caused very slow water penetration. Good rains for most in June and July have now got the feed growing well for the majority of growers.

The high dust content in wool is returning to normal as the shearing gets later in the year. Tender wool with high mid break is likely to be a problem in many Spring-shorn wool clips.

The Western Region is embarking on AWN's DNA project, where 10% of Superfine clips received at Dyson Jones will be processed to garment stage and marketed with our provenance stories and labelling, to gain more members for our Association. Profits from selling the remaining 90% are used to process the selected 10%. Under AWN's new arrangements, the garments under Merino Snug label, will be manufactured in WA.

We are still interested in supplying surplus sheep for re-stocking drought or bush fire-affected areas, with direct transport from farmer to farmer, at prices fair to both parties.

So far, we have not been able to co-ordinate any consignments but more sheep are becoming available as the season progresses.

Our AGM and a general meeting were held on 4 August. Roland Ritson was re-elected president, Jim Pepper is now vice president and Suma Reid is now secretary.

Roland Ritson
Western Australian Regional Chair

Image by Roland Ritson



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REPORT FROM THE UNITED KINGDOM

This has been a year to remember for Australian wool growers - for all the wrong reasons. Drought, bushfires then COVID-19 and the consequent crash in the global wool market.

Here in the UK our problems seem small by comparison, but still challenging. The wettest winter on record was followed by COVID-19 and lockdown, plus the driest April/May (our peak grass-growing period,) since records began. As we begin recovery, we have renewed concerns over BREXIT to deal with, plus our trade agreements with Europe and the rest of the world. Growing wool has never felt more global!

Our sheep year started in November with AI and ET from our new donor studs in Australia. We have a great vet team who come to the farm and a system which means it's a hitch-free day. The sheep were housed from Christmas, throughout a mild, very wet Winter which ended with the wettest February ever. The mud, rain and continual grey skies took its toll on everyone in our community, except the sheep who were dry and warm, with plenty of food and a deep straw bed!

Winter also saw us taking part in a Foot Rot survey. Birmingham/Warwick Universities are

conducting ongoing comprehensive research into virulent foot rot in UK flocks and we were flagged up by our sheep vets as the only flock known to them without FR symptoms and potentially free. They were sceptical, because it is universal in the UK, apart from occasional small hobby flocks. A team arrived, in full biosecurity gear which was changed between each mob of sheep. Every animal on the property was turned up and every foot inspected. Every fourth sheep was fully swabbed. They didn't say much but were clearly puzzled by a total absence of lesions

because our shearers were short-staffed without their annual influx of Kiwis. COVID-19 has caused nationwide problems for sheep flocks as we rely on young shearers from the Southern Hemisphere to fill summer demand here.

We have an Australian classer working with us at every shearing which is a great help to me as I continue to learn. We are lucky that our bulk wool crop has sold as usual to our retail partner of ten years. Their shops were closed and staff laid off, so we were not certain of

Our small flocks of Superfine sheep in Switzerland, Romania and The Netherlands are doing well, proving that with the correct genetics and good support, the right type of Merino can thrive again in Europe, where they began, 200 years ago.

or lameness. A second visit followed a few weeks later and then the results were in. We are indeed negative for virulent Foot Rot. The only commercial flock so far found in the countrywide study. Merino is unpopular in the UK generally and one reason is foot rot. I am delighted to tell people that the two do not necessarily go together, even in our wet climate!

We sheared the pregnant ewes in February, but the hoggets were delayed until May,

a sale. The rest of the UK wool industry has not fared so well. Prices are now as low as 9 cents/kg greasy. Some farmers have burned or composted wool on farm. British Wool, our AWI equivalent, is facing serious financial difficulties and the future will be challenging. We're fortunate that we sell our wool privately, outside the common system.

COVID-19 lockdown began here a week before we started lambing. Overnight I lost my lambing helper, who had to self-isolate. We lamb indoors because of the weather so



this was a blow. A vet friend on study leave stepped in and did some sessions with me, during which we developed a new protocol for pain relief when tailing and castrating. We got it right and saw our young lambs skip off pain free. Using the NumNuts device is currently not a legal option here, due to issues over timing and use of Lignocaine. So we must use alternatives.

Lambing distracted us from the grave situation in some other parts of the UK. We were unaffected on farm but our grown-up children fled home from London and then self-isolated for two weeks. It was good to have them safe here. Infection and death rates were alarming although not in rural Devon. Our Campaign For Wool Patron, Prince Charles, caught the virus and our Chairman was hospitalised and seriously ill, as was another council member – both important colleagues and friends of mine. Our Agricultural Machinery business was in limbo for a while, as we didn't know what the immediate or longer-term impact would be. Fortunately, we were able to trade as Agriculture was classed as Essential, but we furloughed about 10% of our 100+ staff. Lambing kept us grounded and busy. The beauty of our surroundings and of an English Spring were even more special this year. As were the lambs. New life and hope for the future were precious.

All agricultural shows and trade events were cancelled including the flagship event for the 10th Anniversary of The Campaign For Wool. This was a blow as months of work

and planning had gone into it and we were expecting a massive publicity boost for the Campaign. We have managed to roll it forward a year, so any ASWGA members coming to the UK next May, let me know and I will get you on the Invite list.

My work to encourage Merino in Europe has continued throughout the year. We even managed a sheep export in June, despite even more paperwork than normal. I gave a talk on the project at the online IWTO Congress 2020 which was well received. Our small flocks of Superfine sheep in Switzerland, Romania and The Netherlands are doing well, proving that with the correct genetics and good support, the right type of Merino can thrive again in Europe, where they began, 200 years ago.

As I write, I am reviewing our Breeding Objectives for next season and already planning the joinings. The passion does not diminish, although the energy flags a bit sometimes. We missed our trip to Australia this year, but hope very much to come in February 2021 – virus permitting – when I look forward to catching up with my good friends in our unique corner of the Merino industry.

Lesley Prior, Devon, UK
www.tellenbymerino.com



Below: Ram in Romania



NEW ENGLAND DROUGHT UPDATE

The last twelve months saw a continuation of the worst drought ever. 2018 was well below average, but 2019 rainfall was 40-60% below the worst year ever recorded across the whole of the New England.

This drought was relentless, very costly and very stressful. Lots of grain and hay were fed out and very little other work was done, apart from organising the sale of stock

Stock numbers were reduced by 60% for both sheep and cattle. Mostly females were retained, but not all the core breeders survived, as circumstances meant drastic measures had to be taken to survive.

The wool clip of 2019 was the least enjoyable to work with - ever. It was very dusty and short. It was also the smallest clip for forty years, because so many sheep had been sold.

To add to the drama, there were massive bushfires close to but not directly affecting us. Dust was a constant companion too.

Wild dogs were back to cause more havoc. They killed almost 100 grown sheep and we can only guess how many lambs were mis-mothered. The days already limited spare hours were now allocated to trying to eliminate the dogs. After around 3 months, we finally had a win and eliminated the dogs.

NEW ENGLAND DROUGHT MAP

EDINGTON

EUROPAMBELA

Before and after shots at Europambela. Photos by Nerida McNeill



Recovery

It was decided to breed our numbers up again, to keep our genetics, and not buy in replacements. This was decided from a financial point, and also to avoid lice, worms and weeds.

We needed to repair the farms soils and grass, which had been severely tested during the last few years. We wanted to get organic matter back in the soil and return to close to 100% ground cover.

When the season did break, there was an explosion of grass. This was due to very low stock numbers, a long fallow from the drought and well above average Summer rainfall.

We have so much grass now that we will easily get through Winter. We have joined every female on the farm and have our fingers crossed that they have lots of offspring.

Now that the financial drought is taking hold, this year will be one of survival and doing

simple repairs and maintenance. Big projects have been postponed.

The COVID-19 pandemic is further reducing income especially in the wool market.

It may take 3 years to return to normal stock numbers, and reasonable flock structure. But it could take many more to return to our financial position pre-drought.

Mark Waters & Peter McNeill



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DESMOND MANNING - MIENA

14 April 1925 – 3 June 2020

The Australian Superfine wool growing community lost one of its stalwarts with the death of Des Manning on 3 June 2020. Aged 95, Des was on his beloved property, "Miena" until the day before he died and was out around his treasured sheep the day before.

Born at "the Dee" into a Tasmanian central highland farming family, after seeing his father George blade shear an impressive St James Saxon Merino ram, Des decided his life's work would be to grow similar bright, soft and white wool.

After returning from service in the Korean war, Des was granted a 385-acre holding named "Miena" at Lemont in southern Tasmania. His initial holding was adjacent to two properties that would prove to be pivotal in Des's life and work. His future wife, Lois Burbury, was raised on the neighbouring "Birralee" and he and Lois met while Des was working on "Casaveen" that joined both properties.

With the addition of Lois's portion of "Birralee" to their initial holding, Des and Lois worked tirelessly to build their flock of Saxon Merino sheep and add neighbouring land to "Miena"; along the way having strategic holdings within the Oatlands district and on the east coast of Tasmania.

Des and Lois's children, Michael and Marie, would make substantial contributions to the progress of "Miena" for most of their adult lives, with Michael handling much of the mechanical and cultivation requirements and Marie (a wool classer) focusing on the wool aspects of the business.

Below: Lois & Des with their renowned Superfine Merino wool



Des was renowned and respected for producing quality Superfine Merino wool, usually being rewarded with eager bidding for his wool at auction. Despite periodic downturns in the wool industry, Des persisted with Saxon Merinos, moulding a genetic profile in his flock so that his sheep would do well on the sometimes harsh and dry land of the Southern Midlands.

In 2015, at the age of 90, Des was recognised by the iconic Italian firm, Vitale Barberis Canonico, as having produced the best clip in the previous season for their production of beautiful woollen fabric.

In addition to his love of family and consistently hard work on "Miena", Des was a major contributor to his local community, through over thirty years of service to local government and numerous community organisations.

While Des's passing represents the end of an era and a magnificent life, his legacy will endure through the next generations of his family continuing to farm Superfine wool at "Miena" and contributing to the Tasmanian community.

Below: Des Manning - dedicated to his sheep until the day he died



Below: Des with a bale of award winning Miena wool



GRAEME PHILLIPS - BROADACRES

14 April 1925 – 3 June 2020

'Farm as if you will live forever, live as if you will die tomorrow,' Graeme Phillips lived his life by this saying.

Family, faith, and farming. In no particular order, these were Graeme's life. He gained a love of the land and what it could produce growing up on the family farm "Broadacres" at Tatyoon Victoria. Getting up early to embrace the day, he saw the opportunities life gave and was grateful for all he had. We will always remember Dad as a kind and contented man.

Born in 1939 to Allan and Nellie Phillips, Graeme was the youngest of five children (Allan, Robin, Kenneth (dec. infant) and Dorothy). His childhood was filled with love, laughter, extended family and as it was in the 1940s – lots of hard work. He often spoke of his early years hand-milking cows, separating the milk and selling the cream - raising calves, rabbiting, and the end of the horse teams - riding horses, for stockwork or doing tricks (standing on the backs of two horses whilst they galloped along) - training dogs, playing music – he often woke us up Christmas morning playing Maryanne on the piano or piano accordion. Graeme and his brother Lal regularly performed music and stand-up comedy routines on stage. It was at the beginning of television in Victoria and they were approached to do a television show. Their father told them they had better make up their mind - 'Television Stardom' or the farm – naturally, they chose farming.

With the death of his mother in 1959 and all his siblings married by 1961, Graeme and his father continued living and farming together until his father's death in 1968. One of their favourite pastimes was training dogs, for farm work and dog trials - often training them at shearing time as the shearers were dog trial men too, heading out at smoko, at times becoming so absorbed in the training that the shearing was forgotten. Graeme was one of the youngest competitors to go to the National trials in Canberra and he won State Champion Pairs with Jan-Maree and Royal, something he was immensely proud of.

Graeme loved wool, best of all Saxon Superfine wool. He spoke often of the times he spent with Lin Crawford and others in the industry, of the hours they spent looking at and discussing the attributes of this ram or that ewe. In 1963, the Broadacres Saxon Merino stud was established with a combination of

sheep from Sierra Park and ewes Graeme and his father Allan, purchased at the West Cloven Hills stud dispersal sale. Graeme successfully showed sheep in the 1960-70s. Blade shearing the show team each year, imparting the enjoyment of the show scene to his four children - it was important to Graeme and his family, whenever possible to support fleece and sheep shows, making sure there was a good display on show for the people attending. In later years particularly, at the local Tatyoon Uniting Church fleece, floral and craft show. Graeme was a life elder at the Tatyoon church from 1972.

Having completed his wool classer training, Graeme left school at the age of 14. His keen interest in all wool was demonstrated as he tended to 'call in' to the Geelong wool stores, whether he was selling wool or not, looking over the whole catalogue. On many instances Graeme would join senior and junior brokers discussing the classification and valuation of each lot. He loved talking, debating, and sharing knowledge with his lifelong friends in the industry - wool growers, wool brokers, wool buyers and processors. How times change - once a large number of growers went to inspect their clip on the show floor, now only a few attend the sales. The woolshed has changed also. Stories told of pressing and capping wool, pressed into jute packs in the old Ronaldson Tippett hand-operated wool press. Now we use nylon packs in an automatic wool press. In recent years, Graeme received acknowledgment for being a registered wool classer for fifty years.

As children we remember spending the hottest summer days, or weeks, with Dad picking lamb's wool whilst listening to the cricket, making sure each staple was the best it could be for the top bale. Graeme and his brother won the 1970-1971 Carding-Text lambs wool trophy. Going over the fleeces at shearing, then laying them out again, making the top bales to be displayed in bales on the show floor. At the wool sales, he would look over the lines once more, reviewing and discussing how they could be made better. Graeme always wearing his trade-mark woollen suit and Akubra hat.

We often heard our Dad say it didn't matter what type of sheep or cattle you bred, as long as you could sit behind the mob walking back to the paddock and be happy with what you saw. Sure, there were always some things you could improve; breeding is a work in progress. He taught us to appreciate all good animals (or fleeces) regardless of the breed.

Graeme was an inaugural member of the ASWGA and attended the first meeting. He liked that the ASWGA bought together people passionate about the Superfine wool that they grew. Bringing together people from different regions, with different bloodlines,

different ideas, ways and techniques. That the ASWGA doesn't say one way or one bloodline is best; it just encourages members to strive to produce the best product that they can, a product to be proud of. Dad enjoyed entering the Zegna competition and later the ASWGA fleece competition. Proudly promoting and supporting the ASWGA whenever he could.

In 1970, Graeme met Bronwyn Impey, marrying in 1971. They had four children Barbara, Elizabeth, Penelope and Andrew. Mum joked that Dad went from training dogs to training kids and bemused that surely one of us would be her helper, but Dad was always happy for us to help him out. Naturally we chose farm work before house work. Even the grand children Ben and Oscar, Rachael and Jack, and Sophie all spent time with Grandpa in the ute feeding sheep, moving a mob, or checking the lambing ewes and calving cows. Our Dad loved all his family and his love for Mum was never-ending.



Graeme with one of his award winning rams

As many farmers do, Graeme experienced hard times of droughts and fires (February 1977 & December 2013). In the 1977 Streatham bush fire, Graeme and Bronwyn were burnt out. The fire truck stalled with Graeme on the back as the fire front hit, he saved the house, but his lungs were damaged permanently. The only livestock that remained after the fire were the horses, some cattle and a few sheep. Losing years of selection, Graeme observed the best lambs he had bred were lost that year. With the support of family and friends they rebuilt, staying with the Saxon's. With little stock left most of the farm was sown to crop, and Graeme turned his hand to breaking his standard bred horses to cart and went racing. In 1983, they established Broadacres Poll Hereford stud. Graeme really enjoyed following the genetics of family lines, whether it be his sheep, cattle, horses, or dogs.

Our Dad always had time, even if he didn't. Visitors, agents, and relatives always had to stop for a cup of tea and something to eat, Mum is the best cook. If you stayed long enough you got to lend a hand, cousins came lamb marking, carting hay, it was fun working side by side, that way you always got to have a real good talk.

Many times, health issues impacted Graeme's

life; some would say he must be a cat with 9 lives. At age six, he fell from his horse 'Sunny Boy' on the way to school, unknowingly shattering his skull. Graeme continued on at school for a week, it was only when his head swelled up he was taken to Ararat hospital where he was treated for fly bite. Showing no improvement, his parents took him to Ballarat where they operated immediately. Being war time, crude penicillin was in short supply and it was smuggled from Sweden into the hospital for him to use. Surviving, Graeme had to learn to walk and talk again. Those who knew Graeme would remember the deep scar on his forehead where they continued to operate to remove bone fragments. At 18, back problems came with a diagnosis that he would be in a wheelchair by 19, but he worked hard to stop this being the case. Other setbacks included broken legs, collapsed lungs, dying and being revived whilst on the operating tables. Then at the end came a diagnosis of amyloidosis, with a life expectancy of three months, but lucky for us he always liked to prove the doctors wrong. He remained with us for 6 years, the final 7 months being a hard fight. In those final months, our cousin Christine hand spun and knitted a blanket out of his wool. Graeme kept the blanket on his hospital bed until the end, keeping the wool he loved near. Visitors commented on the blanket's beautiful soft handle.

Our Dad, Graeme Phillips, instilled in us a love of the land, of livestock, and of family. Showing us the power of kindness, how to make time for others, and the importance of being contented. He taught us that if you want something, keep trying, think sideways and you will get there, it might be hard, but you can do it if you really want to.

Graeme Alexander Phillips. Born 22nd February 1939 - Died 1st February 2020



The Phillips Family (Top) Graeme with broker Ted Wilson of Jacksons of Geelong (below)

MERINEO FINDS PARENTS LOVE SUPERFINE MERINO FOR THEIR BABIES

Three years ago, Merineo was born with the creation of a unique hospital-trialled newborn swaddling bag designed and proven to help babies settle better. Merineo has since grown to include a range of baby sleeping bags and children's singlets, tops and leggings.

Founder of Merineo, Claire Hausler, was delighted with feedback from parents about the 'softness' of the 17.5 micron Merino wool fabric used to make the swaddling bag, which prompted her to expand the range of products. "I think many consumers shy away from using wool because they believe it's itchy. It's been wonderful proving Superfine Merino is soft on baby's delicate skin, making it the ultimate fabric to use on babies."

When baby outgrows the swaddling bag, Merineo's larger baby and toddler sleeping bags are available for baby to transition into. The swaddling bag and baby sleeping bag have been assessed by the International Hip Dysplasia Institute as 'hip-healthy' in their design.

For babies in warmer climates or for those born in the summer months, Merineo offers sleep products in a lighter weight and highly breathable 'cool mesh' fabric, also made from 17.5 micron Merino wool. Claire reports that because many parents these days use central heating, the "cool mesh" products have been popular for use in cooler months too.

Merineo introduced child singlets into its range earlier this year. The idea to design and manufacture singlets came about through Claire's experience in buying singlets for her son Jack, now 5 years old. She found most singlets did not hold their shape after the first wash, and Jack would quickly grow out of them because they were too short. To overcome these problems, Claire designed singlets, sized 000 to 7, to be slightly longer in length and using a stretchy,



highly breathable 'beehive knit' fabric (also 100% 17.5 micron Merino wool). Claire believes the singlets make a long-lasting garment to be handed down to new junior family members.

In July, Merineo launched a range of long sleeved tops and leggings for babies, with unique design features including convertible cuffs on the feet of the leggings to keep baby's feet warm and cosy and cuffs on the hands of the tops which convert into mittens to prevent self-scratching.

To market Merino wool's benefits on babies, Merineo uses AWI's research proving that using 17.5 (or less) micron Merino helps reduce child eczema and that wool aids sleep. The research helps support the proposition that the health benefits of wool make it the fibre of choice to use on babies.

Obstetricians are showing interest in Merineo's products because of the health benefits of wool and the fact they are made in Australia.

Purchased to gift to babies they deliver, the products are a premium and useful keepsake gift. Claire says, "I'm pleased the obstetricians are happy for Merineo to also include an "Education Brochure" in the gift for parents to read about the health benefits of using wool on their baby."

Merineo offers all ASWGA readers and friends a special discount of 10% off everything at Merineo.com Use discount code "ASWGA20" at checkout. Offer expires 31 December 2020.



MICHAEL MANION WOOL INDUSTRY FOUNDATION - A GOOD NEWS STORY

When times are difficult, as they are now, it is nice to be reminded of the better things in life. The wool industry is full of them. One revolves around the late Michael Manion, who was a well-known and highly regarded wool buyer and exporter based in Melbourne. He was also a larger-than-life character. Michael was well known for his willingness to share his knowledge of the wool industry with new entrants to the trade. Sadly, Michael took ill with cancer in 2014 and passed away six weeks later in July of the same year. He was only 61.

The wool trade is well known for its generosity to charities. So it came as no surprise when a number of Michael's exporter mates in Melbourne wanted to do something to remember him and his contribution to the younger generation. It was also no surprise that it was decided to create a Charity in Michael's memory and called it the "Michael Manion Wool Industry Foundation". The Chairman is Michael's good friend, Ken Stock. The first Meeting was held on 16 January 2015.

The Foundation's vision is to raise funds that are used to support rural families who have hit a tough spot of any sort in their lives. Funds are raised primarily by auctioning bales to exporters that have been variously donated by wool growers, brokers, private treaty merchants, buyers and exporters. It is fair to say that the bidding is hectic and that the bales invariably sell for more than they would have at a conventional auction. The Foundation maximises the funds available for support by the Directors working on a pro-bono basis.

Becoming aware of rural people in need turned out to be as straightforward as first thought - rural people are very resilient in the face of adversity and are very good at supporting each other. Also the Foundation Directors are city-based. This was soon overcome with great assistance from the network of wool brokers, private treaty merchants and others based in the bush and

more generally by others as the Foundation's work has become more widely known.

Support has been provided in a number of ways that have included medical treatment, travel, the ability of families to take respite breaks and assistance to help keep a remote kindergarten open in Queensland.

The National Council of Wool Selling Brokers of Australia celebrated their Centenary of operations in February this year. Part of those celebrations was an auction at which the \$16,700 was raised for the Foundation.

Participation in the Foundation's activities has also brought reward its Directors and Advisors through seeing the appreciation of (and meeting) the recipient families. No one will forget the day that 8 years-old Annie Singe, who had already had over fifty operations at the time for a rare skin complaint, addressed members of the southern wool trade at a fundraising event in the Melbourne sale rooms.

The Foundation has evolved with time, as the Directors have now been joined by additional Directors and Advisors that extends the Foundation's coverage from Victoria to include New South Wales, South Australia and Western Australia; and to include brokers as well as exporters.

How you can support the wool industry's charity -- Support (i) direct donation (ii) purchase a 100% Merino Wool Sweater - The Swoolly (iii) share our stories. See website/Facebook for further details - our web site (www.mmwif.com.au) and Facebook (<https://www.facebook.com/MMWIF/>).

Peter Morgan
Secretary

Below: Annie Singe by Felicity Melton



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AWI: 2020 VISION IS A GREAT THING THE SAME CAN'T BE SAID ABOUT THE YEAR

2020 is proving to be one of the most challenging that our nation as a whole, and our wool industry in particular, has had to wrestle with.

At AWI we know woolgrowers are doing it tough and we are working every moment of every day to make things better for the Australian wool industry. Bushfires and drought were already bad enough and then along came COVID-19 which has smashed demand for our fibre around the World, with no clear time frame when things will get better.

When they do, we will be ready to make the most of it so more Australian wool is bought and worn all around the World.

The news hasn't all been bad there has been some welcome rain in parts of New South Wales. Unfortunately, at the time of writing, Western Australia, South Australia and Queensland have missed out.

AWI is working for growers on all these things and while we can't make it rain, or cure COVID-19, we are trying to minimise the downside and be ready for the opportunities when things improve.

Just know AWI is working hard for growers.

Whether it's training a new generation of shearers, improving the skills of today's shearers, working for a cure for flystrike, working on finding new markets for wool, AWI is proud to be owned by growers and dedicated to making our industry sustainable and profitable.

But more than that, we are listening to growers through the Woolgrower Consultation Group and will later this year release 'Wool 2030' – a long-term strategic plan for Australian woolgrowers.

The global coronavirus pandemic affects the wool industry in many ways, but the way that it affects most profoundly is in the reduced

purchasing of garments by consumers.

Due to social distancing and lockdowns in so many countries, people have simply been unable to get to stores to buy garments and many people do not have the spending power they once had.

Make no mistake, retail sales have been hit very hard indeed and it looks like overall consumer demand for wool will be weak for at least the next six months or so.

The pandemic has impacted some countries more than others. At AWI, we are looking to ensure that we identify markets and sectors that will recover quickly and drive demand as we come through this unprecedented disruption. China in particular has got the potential to recover most quickly, which would be great news due to the size of its economy and its importance for Australian wool, as it is both a big consuming and processing market.

While the US has been badly hit by the virus, it will be interesting to see how long it takes to bounce back.

Unfortunately, two of our biggest markets, the UK and Italy, have been badly hit by the virus and each had to impose severe lockdowns, which has badly reduced consumer spending there.

AWI must be smart about when, where, and indeed whether it is prudent to actually spend woolgrower funds – and this is especially the case with our marketing activities at the moment. There is no point spending money marketing a product if consumers cannot buy it.

Once we see the market recovering, we will deploy the marketing funds that we held back as quickly as we can and try to stimulate demand.

When the full impact of the coronavirus pandemic first hit in March, we switched our focus in the short term to retailers and brands

that have proven digital retail platforms, because online purchasing has not been hit as hard as brick and mortar stores. While so many people have been isolated at home, online shopping and social media has been key to our promotion and messaging to sell product.

Our marketing teams have worked hard to tap into what people are likely to purchase online while at home and identify opportunities for wool. We have tried to be in step with the mood of consumers and have been highlighting wool's health and wellness benefits, its suitability for comfort in the home and whilst exercising, its benefits for rest and sleep, and hand knitting for keeping busy and easing anxiety. We have also been promoting wool's natural eco-credentials.

Most of our on-farm R&D projects continue as normal and we closely monitor their progress and budgets. However, during the first half of the year, many face-to-face industry events and activities for woolgrowers have had to be postponed or cancelled due to government social distancing guidelines. AWI has responded quickly and made many of its own events available online instead. Examples include the Back to Business series of twelve webinars, that were originally scheduled as workshops throughout bushfire and drought-impacted regions. Another example is AWI's popular RAMPing Up Repro workshop, that was held online as a webinar in early April. All these webinars are recorded and made available to be viewed free at any time by woolgrowers, wherever they are in the country.

Thank goodness in recent times some in-shed training and wool classing workshops have been possible – may there be more.

Bring on 2021 and a return to better times.

Kevin Wilde -
Australian Wool Innovation



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MERINO LIFETIME PRODUCTIVITY PROJECT



The Merino Lifetime Productivity (MLP) project is collecting lifetime data across five diverse environments and several Merino types to help better understand and deliver Merino ewe lifetime performance outcomes.

The project is funded by AWI in partnership with site hosts, sire entrants, and is managed by the Australian Merino Sire Evaluation Association.

Of the five MLP sites across Australia, the New England site has the main Superfine focus (17 micron). This site is hosted by the site partner CSIRO at Uralla NSW and the New England Merino Sire Evaluation Association.

Each site runs two drops of ewes who are the daughters of industry sires that were specifically selected to be industry representative and relevant. Of the 134 sires used across the project, 20% of sires are from flocks of ultra and Superfine fibre diameter, with several of those being from traditional type flocks.

New England Update

The New England site includes a diverse group of sires specifically selected for entry

into the project to provide a mix of rams with/without ASBVs, show results and proven/unproven genetics. A number of sires were selected because of their fine wool production traits including low fibre diameter and traditional style.

Sires entered at the New England site are listed here:

After more than two years of drought, 2020 has brought welcome rain and the cessation of drought feeding. The CSIRO's dedication to the project through this prolonged period is recognised and appreciated, as is the drought funding support provided by AWI.

The recent COVID isolation measures have resulted in altered approaches to data recording, however the core project data remains on track for collection.

The ewe progeny of these sires will be displayed as part of the New England's 2020 Online Field Day via a dedicated webpage following their July shearing. The online field day will include ewe inspections in their sire groups alongside their previous and current results, plus provide a site overview, a showcase of associated New England research and other project information.

The online field day will be available on August 13 2020 at merinosuperiorsires.com.

www.merinosuperiorsires.com.au/newenglandfieldday and there will be an associated results webinar also held August 13, 1pm AEST facilitated by Sheep Connect NSW. Pre-register for the Results Webinar via <https://www.sheepconnectnsw.com.au/>.

Results Update

MLP results from each site and their drops are available via:

www.merinosuperiorsires.com.au/mlp-project-results.

In April 2020, MERINOSELECT commenced utilisation of repeat wool, growth and reproduction data from the project to provide greater depth to industry data for traits measured beyond the hogget age stage. Relevant project data now routinely flows into the MERINOSELECT analysis as it is collected.

Project Analysis and Reporting

AWI has recently made the project's analysis and reporting plan available for download via www.wool.com/MLP. Feedback is welcome to Geoff.Lindon@wool.com.

Visit for more MLP project information visit

www.wool.com/MLP or www.merinosuperiorsires.com.au/mlp-project

2017 Drop		2018 Drop	
Connemara Poll, 140257	Moorundie Poll, NE73*	Alfoxton, 150430	Hilltop, HT Poll 156
Conrayn, MVB123	Nerstane, 150073	Avington Poll, 160047	Karori, 150222
Cressbrook, 140055	Petali Poll, 150697	Bungulla, 160350	Nerstane, 150073*
Egelabra, HEK 1.36	Trefusis, 150282*	Clovernook Poll, 160095	Petali Poll, 160849
Grindon, 150017	Trigger Vale Poll, 140477*	Cressbrook, 140055*	Tallawong Merinos, 150280*
Karori, 140188	West Plains Poll, 110004*	Eilan Donan, 5145 (Harvey)	Wurrook, 130149*
Miramoonna, 140012	Yalgoo, 150313	Europambela, 120101	Yalgoo, 160070
Mirani, 21.2		Hillcreston Park Poll, 110143	*Link sire



L/R -Lesley Prior, Olivier Segard, Managing Director, Segard Masurel S.A.S., Jeannette Cook, IWTO Genady Fedotov, Wool Sourcing Consultant, KoFibres Ltd, Craig Smith, General Manager, Devold Wool Direct NZ Ltd, Dalena White, IWTO

ISPO 2020

ISPO Munich, held in January, is the world's largest trade fair for the Sportswear and Athleisure Industry. 2,800 exhibitors and 85,000 trade-only visitors over three days, make it the ideal place to judge mood, trends and reactions to current issues in this segment of the apparel wool market. I attended by invitation of IWTO and the European Outdoor Group, a Trade Body which represents the interests of the European Outdoor Industry.

Wool retailers and organisations were clustered around a specially designed Sustainability Hub in one of the largest halls. Special exhibits, talks, displays and seminars focused on key messages. The overall theme was "Be Responsible" with a sub theme of "Do Good And Talk About It".

I spoke to many of the important retailers of our wool - Devold, Patagonia, Icebreaker and some smaller brands. As soon as they realised I was a wool grower they were very keen to talk, to ask questions and to raise issues they have.

The overwhelming impression I got was that there was huge positivity towards wool. The message that it's the ideal fibre for the Outdoor Industry is getting through loud and clear. Brands were using it enthusiastically already, or wanted to use it, but had some issues with doing so. The three hot topics were Climate Change, Regenerative Agriculture and Animal Welfare. Corporate Social Responsibility (CSR) was driving much thinking in this area and also new Retail Models – moving away from Boards and

Shareholders, to more community-based funding systems, where consumers have even more influence.

Climate Change was a real worry. There was some eco-babble, some greenwashing, but also some serious and credible thinking. Anything showing how suppliers were addressing the issue was welcomed by brands.

Regenerative Agriculture was seen as increasingly important to combat Climate Change. Brands are as uncertain as the rest of us about what Regen Ag is and are relying on schemes to rubber-stamp good practice. They are beginning to realise there are too many schemes of variable quality and credibility. There is opportunity here for growers to seize the initiative.

Animal Welfare was a major topic. The number one issue was mulesing. I was very surprised by the detailed knowledge of many brands. Those who were nervous or very new, were sourcing outside Australia. News of my small flock in Europe was met with huge enthusiasm.

Just second to mulesing was tail docking. Again I was seriously surprised by the level of knowledge of techniques and options.

Building trust by direct engagement was seen as a key way around difficulties. Making connections with individual growers was hugely valued and those brands who had done it were really pleased with the results. Many brands wanted to connect but didn't know how to.

During my three days at ISPO it was obvious how valuable to both sides face- to-face

encounters were. Attending these events as a grower is, in my view, really important. I was representing myself only, but I was still able to answer so many questions and clarify basic misunderstandings. Brands want to understand all aspects of wool production – from sheep to garment.

So, the take-home messages were:

1. Wool is wonderful, exciting, good for the planet and Outdoor brands want to use it
2. Climate Change and Regenerative Agriculture are very important to this market and growers who can prove their credentials will have an advantage. BUT care needed on choice of scheme.
3. Mulesing remains a major issue - and tail docking is also on the agenda.
4. Direct relationships with growers are hugely valued and brands would like more and help in facilitating those.

Lesley Prior



IWTO AT 90

The International Wool Textile Organisation's mission is "to connect all parts of the supply chain in order to strengthen wool's credentials as the World's leading fibre. Membership encompasses the entire wool textile pipeline, from farm to retail."

Since 1930, the International Wool Textile Organisation has represented the interests of the wool textile trade worldwide. It is the recognised global authority for standards in the industry.

Projects are undertaken in the following areas:

- Sustainable Practices
- Product Wellness
- Wool Trade Biosecurity
- Wool Sheep Welfare

It provides industry-related publications (www.IWTO.org) and continuous positive messages about wool. In looking to the industry's future, it has the Young Professionals Program for those aged 35 and younger, to provide them with the opportunity to gain an insider's view of the global wool industry. (This is the program ASWGA sponsored Cameron Gall for last year.) Anna Cotton (Kelvedon, Tasmania), a 2019 participant, was profiled in IWTO's Wool Review magazine.

The annual congress provides an update to members and others on the industry generally and specific projects, as well as being a great networking and business development event.

Since 1930, the International Wool Textile Organisation has represented the interests of the wool textile trade worldwide. It is the recognised global authority for standards in the industry.

The 2020 Congress, a fully digital one, now has its presentations freely available either on its YouTube channel, or Facebook.

The presentation that has received most attention was given by Giovanni Schneider, the CEO of the Schneider Group - a great ASWGA supporter. He had harsh words for the fashion industry. "It is a broken system. It destroys everything it touches." He reminded the audience that wool's share of textile fibres has declined from over 2% in 2000 to less than 1% in 2020. We need to regain the customer and focus on what the customer wants. Decarbonisation, perhaps a bigger challenge than animal welfare, and circularity (re-use), are key issues and we need to work together to address them.

The opportunity is there. The world is looking to wool for more a durable, sustainable and authentic product. Post-pandemic, the demand will shift to quality, timeless goods. "We must be the change we want to see." To achieve this requires a change in mentality and

we need to stop fighting each other.

ASWGA member Lesley Prior presented at IWTO 2020. Her topic was "Bringing Merino Home" with, in this case, home being Europe. The presentation is on YouTube and well worth viewing. Lesley has been selling to European customers and has clients in Switzerland, Romania, the Netherlands and Austria. The advantages of a shorter supply chain are clearly evident, as is the place of Merino in regenerative agriculture.

Dr Steve Wiedemann, Chair IWTO's Wool Life Cycle Assessment (LCA) Technical Advisory Group (TAG), provided an update of TAG's work in relation to promoting a level playing field for wool and textiles with respect to environmental assessment. This means ensuring that comparisons are on "like terms" with the "right terms".

A full LCA for wool has now been completed which will show wool in a better light. LCA is of growing importance as consumers become more environmentally aware. It is the most common method for establishing and comparing a product's environmental footprint. It measures categories of impact, including greenhouse gas emissions, water use and resource depletion. Wool's position has been discounted because of the complexity of measuring agricultural production. "In use" factors, such as the longevity of woollen garments and lower washing frequency, have not been taken into consideration. On the other side of the ledger, the release of microplastics has not been taken into account when assessing fossil fuel-based textiles.

Dr Weidemann also discussed his group's current focus which is the EU Product Environmental Footprint (PEF). This is expected to become the most influential reporting system for environmental credentials. It will supersede measures such as the Higg Index that have given natural fibres a bad rating. The risk is that wool may still not score well and that this erroneous perception will be included on point of sale labelling.

However, there is work to be done as greenhouse gas (the area agriculture does not do well) is weighted heavily. The preliminary results show that farming is still responsible for about 50% of a woollen garments score.



Steve's success in shifting the dial on this will be critical for us.

Megan Meiklejohn, Sustainable Materials and Transparency Manager at Eileen Fisher, a US womenswear company provided an interesting brand perspective on sustainability and beyond. Back in 2015, the company set itself a five-year target. This went beyond the animal welfare standards we now expect to see. It included best practice in land management and supply chain transparency. The position had been well-researched and included an understanding of the role animals can play in providing sustainable solutions. There was an issue with the sheep types which illustrates that "a little knowledge is dangerous". Had the Congress been in its usual format this would have been able to be addressed.

Madame Peng Yanli, President of the China Wool Textile Association, had some chilling statistics on the impact of COVID-19. Wool product exports were down 31.1% in Q1. (The EU and USA were down 40.1% and 38% respectively.) The corresponding decline in raw wool imports was 17%. More than 50% of mills were not profitable. By May, there had been a resumption of operations by most companies, but with utilisation rates from 40% to 80%.

Madame Peng warned that the pandemic impact has resulted in a faster market decline than the GFC and may see companies fail. The recovery is likely to be less certain due to the declining supply of raw wool. In a comment that echoes Giovanni Schneider's call, she suggested that "the global wool industry needs to cooperate, strengthen exchanges and communication, and open up the industrial value chain to achieve positive development for all".

In conclusion, reviewing the presentations is interesting for three reasons. Firstly, the specific content; secondly, the attitudes to issues such as animal welfare, traceability and sustainability that come through the presentations; and, thirdly, the opportunities that exist for wool – if, as growers, we are willing to listen to and work with potential customers.

Simon Cameron

Below left; Lesley Prior presented at IWTO via the internet. Below; Giovanni Schneider of G. Schneider, speaker at IWTO



NEW ENGLAND WOOL: TO INFINITY AND BEYOND - THE WOOL INDUSTRY RESET

COVID-19 is no doubt the most disruptive and far reaching threat the wool and textile industry has experienced in its long and illustrious history. History has thrown up various wars, strikes, economic crises, trade issues, droughts, fires, over-supply and under-supply, changes in fashion, animal welfare issues and currency/finance uncertainty, just to name a few. But the worldwide ramifications of this current pandemic are hard to fathom and even more difficult to predict. Now that might seem like a negative or startling way to start an article? Where's the good news? For sure, the industry is faced with the need to reset. However, for those that are prepared to embrace change, the disruption that we face now will most likely bring opportunities in the future.

We are witnessing the reactions of a human race being forced to stay put, social distance and engage with the world remotely. The so called "normal" has been challenged and man has found new and novel ways to do what they do and live how they live. This crisis has also given people time to think about the world they would like to see as we emerge from our quarantine cocoons. Little or no air travel, working from home, Zoom meetings replacing face-to-face contact and a focus on what "really" matters will impact on the future living and purchasing decisions the general public will make in this forever changed world. This means the wool industry will need to reset in some way in response, but it must be remembered that with wool we have a fantastic toolkit that can construct a

future with less impact on the environment. It is sustainable, renewable, sequesters carbon, is high quality, can clothe a World that is increasingly being casualised, is beautiful, elegant and stylish. Not bad..... but only if the industry can effectively and credibly relay this wonderful story to the discerning consumer. I would like to share just a few examples of where the wool industry continues to work towards a sustainable future, in spite of the difficult commercial and social turmoil the COVID crisis has created.

Reda and Vitale Barberis Canonico are long-term customers of Australian wool, and companies who has taken leadership positions in enshrining sustainability into their raw wool sourcing practices and wider business operations. They have also been groundbreaking in inspiring growers to share those values and to tell their sustainability stories. There is no doubt that the sustainability/transparency tide is well and truly coming in and consumers and brands are riding the wave.

Reda has just qualified for the B Corp certification which validates its commitment and credentials toward the environment and a socially responsible business model. It is the first Italian textile firm to obtain such certification and among the few companies operating in the same sector worldwide. B Corp's community numbers more than 3,400 certified firms, 140 of which operate in the apparel and textile sector. Reda has been evaluated and successfully certified via a

questionnaire that measures degrees of social and environmental performance according to five categories: governance, people, community, environment and clients.

"It is fundamental that companies increasingly become places where we can share and promote values, visions and projects, beyond profit," said Ercole Botto Poala, chief executive officer of Reda. "Sustainable innovation is the first step toward creating value for the society, which is only possible if people are involved and seen as the true protagonists of change. We are proud that Reda is the first textile company in Italy to adopt the B Corp model, as yet another expression of its concrete commitment toward people and the environment," he added.

B Corp certification is bestowed on companies deemed responsible corporate citizens. It considers their impact not just on investors, but on employees, the environment and the communities in which they operate.

VBC recently released their 2019 Sustainability Report (the second of such reports) highlighting the important role of wool and wool growers in their responsible supply chain and cementing VBC's strong belief in sharing a culture of sustainability. This important document plays a significant role in tracing the steps already taken and in defining future steps, with a view to continuous improvement in the three fundamental areas: people, environment and product.

VBC interprets the idea of sustainability as the coexistence and interrelation of three principal aspects: economic, social and environmental. The connection between these three pillars enables the guarantee of sustainability in terms of the business, i.e., its ability to create value over time, a necessity for the survival of the company. During its long history, VBC has always been committed to sustainability, starting with its close ties to the region, from which it takes its principal resources and to which it is devoted to returning economic growth and support to the community, while always respecting environmental issues.

The concept of transparency is one of the most important VBC values which is evidenced in the manufacturing process by the traceability of the products. Vitale Barberis Canonico has invested resources which give the ability to follow and track the production chain of every individual piece, right from the origins of the bale of wool which make up the finished product. Not only does this traceability project respond to the requests from brands/retailers, it also aspires to contributing to a culture of products and processes, thus leading the end consumer to

Below: Reda CEO Francesco Botto Poala



Below: Alessandro Barberis Canonico, Chairman of Vitale Barberis Canonico



a type of behaviour which is both aware and responsible.

More close to home, Sheep Producers Australia and Wool Producers Australia have teamed up under a joint funding umbrella provided by MLA and AWI, for a new initiative across the whole Australian sheep and wool industry - the development of the Australian Sheep Sustainability Framework. I am currently part of a Steering Group representing different segments of the sheep meat and wool industries. The Australian Sheep Sustainability Framework represents the Australian Sheep Industry; for the first time taking steps to establish a collective vision, priorities, and acceptable metrics, for sustainable sheep and wool production practices over the coming decades.

The Australian Sheep Sustainability Framework is about setting clear goals and priorities at the level of the whole industry, not for individual farm business. It must be clear about the sustainability outcomes sought and how these are to be measured, and monitoring progress over time.

Importantly, the Australian Sheep Sustainability Framework is not a commercial 'scheme', nor a competitor to schemes. Rather, it may help foster an environment where these schemes flourish and where the values embedded in these schemes are more widely recognised at a whole of industry level.

Basically, the Framework should be a practical tool for the industry to show its sustainability credentials, find practical and meaningful ways to measure and monitor its progress and take ownership of areas to be improved. The Framework is concentrating on demonstrating positive and ongoing improvement, not perfection. Whilst not being a scheme (such as ZQ, SustainaWOOL, or RWS), it is hoped that it will blend well with established sustainability schemes and to share knowledge and data to alleviate duplication and assist the commercial world. The Steering Group is charged with collaborating strongly with all industry stakeholders from production, transport, marketing, processing, brand/retail and the final consumer on pillars such as animal welfare, environment and climate, people and communities and financial resilience.

Speaking purely of wool, it is true that confusion exists due to the multitude of commercial schemes and I am sure that "audit fatigue" has well and truly set in for many producers and businesses along the supply chain. However, the schemes and audits exist because of a vacancy that was left within the industry of a way for wool participants to tell their sustainability stories and confirm their

sustainability credentials, underpinned by "real" data that is independently verified. There is an increasing demand for compliance through the pipeline and a movement from not just sustainability, but towards a regenerative type of agriculture with the move away from "ticking boxes" to tracking positive change. No doubt the biggest change that the customer is looking for right now is a reduction, refinement and replacement of painful husbandry practices. The top of the list is obviously mulesing and to put this into a commercial sense, the only trading business that I have been able to finalise this year has been for "NM/CM" orders – and clients sometimes stipulating purchasing from countries other than Australia.

The active pursuit of a sustainable and regenerative future is the way of the world now, and not even COVID-19 will hold back this wave - in fact it has probably just made the wave closer, faster and larger. It seems now that COVID will accelerate the trend to casualisation and online retail, and we will emerge with increasingly digital-driven consumers, even more strongly reaching for trustworthy products incorporating quality, sustainability and traceability.

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Managing Director
New England Wool Pty Ltd



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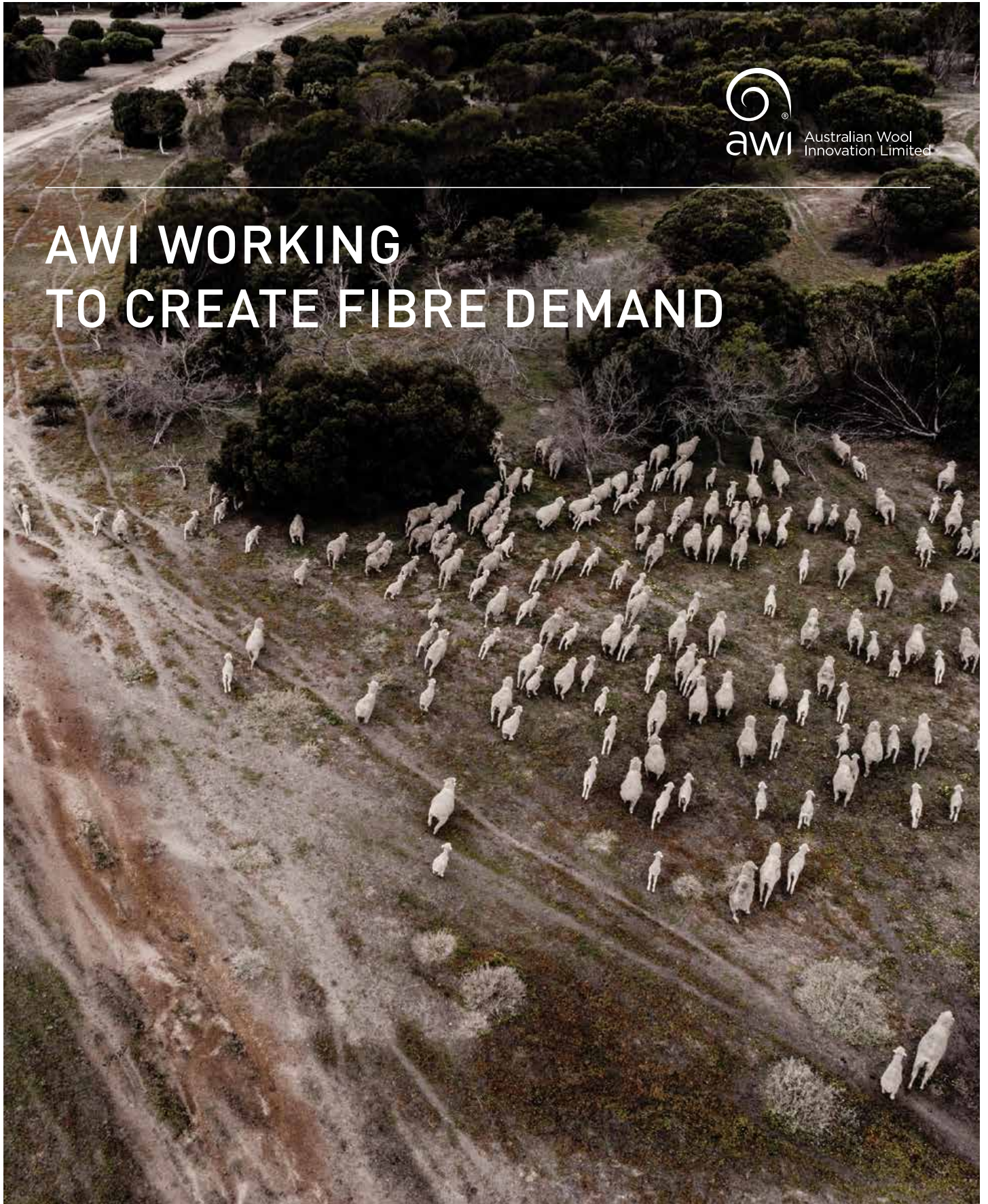
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