

Processing and commercial opportunities for European animal fibre producers

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Abstract

The challenge was to offer top quality woolen processing systems developed over many decades in the Biella textile District directly to the producers themselves. Apart from the more evident difficulties involved due to the necessity that the operating base is able to communicate in several languages, the cultural differences between a variety of producers from a predominantly agricultural background and the processors in the textile industry, which in most cases, they have never had any direct contact with. New consumer trends are offering opportunities to the European fibre grower to provide products which fully match today's up and coming demand for sustainable fashion. This demand can be satisfied by encouraging the producer to learn more about his fibre, to aid him in his promotion using by indirect social network approaches and providing him with a traceability system from farm to factory to farm.

Today's consumer market for the small agricultural producer

Recent changes in the global economical and ecological climate are having a positive impact on the marketing of quality agricultural produce and opening new opportunities for the small farmer.

Local quality food production is leading the way, the words "organic" and "biological" are commonly used as marketing tools and there is a growing demand for local products from the conscientious consumer. He automatically associates these words with wellness, and no human being on earth desires poorer health. Subject to there being clear guidelines of both supplier and consumer, the consumer is prepared to pay extra for this.

A small number of consumers are also requesting, amongst other things, a low carbon footprint, and a favourable life cycle analysis which narrows the options available to him, and certainly complicates mass globalised industrial suppliers and distribution systems, who however will always be able to count on the middle to lower class consumer for their sales.

The terms "Ecological" and "Sustainable", if used to define quality products, is not for mass produced multinational globalised production and distribution systems. It is for much smaller enterprises, quality suppliers for quality consumers.

Tomorrow's consumer market for the small animal fibre producer

The world textile industry on the whole is not sustainable, neither is it. Or will it ever be, ecological. The life cycle analysis results are often arguable. It is not difficult to imagine that mass textile production in third world countries, especially in garment manufacturing, is similar to that in Europe between 50 and a 100 years ago.

Presently the wool textile industry is mainly in Asia, and the bulk of the European wool clip is exported in the grease to India and China and other countries for manufacturing. Labour costs are many times lower, their governments encourage entrepreneurs financially to build new textile enterprises, often creating mass over production and the costs to the environment are for all to see. However the western consumer is becoming growingly aware of the situation, and has begun to put up resistance when making purchasing decisions.

Generally speaking, wool and other speciality animal fibres, grown on European farms are probably amongst the most sustainable compared to animal fibre from other continents. The wool industry in Europe is probably the most ecological, given the stringent health and safety regulations which have infested all sectors. However this industry has been decimated over the last 50 years, and more so in the last 15, when Asia became the world's manufacturing base. It is likely we are at its lowest level, and medium to long term there will be some return to Europe as costs in Asia inevitably rise.

It is estimated that a total of about 150 million kilogrammes of wool are produced in Europe every year of which approximately 30 million kilogrammes of British wool are collected by a central organization (British Wool Marketing Board). This is owned by sheep farmers with the aim of moving the wool from the farm gate to the market in the most efficient and economical way to maximize the income to the farmers. The rest is handled by several farmers associations but almost all passes through traditional merchanting channels which have been in place for hundreds of years. 35 years ago the farmer was still receiving an adequate payment for his wool, but today, in many cases, he cannot even cover the shearing costs. It is recognized by all parties (apart from local merchants...) that a similar central organization should be set up in many European nations. Should there be any growth in manufacturing, it is imperative that there exists a European wool collection network

Biella The Wool Company is proud of being the first company in Italy to launch a pilot scheme to encourage farmers to participate in such an operation. It is now in its third full year and has produced surprising results.

Consorzio Biella the Wool Company

A non-profit organization providing wool services, with 4 main objectives:-

- A. The creation of a wool processing chain for the small farmer, from the greasy wool to the final product, utilizing quality commission mills from the Biella textile district, located on the edge of the Italian Alps, that is recognized worldwide for the quality of its wool industry. There are still almost 1000 enterprises involved in textiles in this small city and surrounding areas. The farmer is then able to commercialize wool products to the final consumer with his own wool from his own sheep, and permits him to increase his revenue on the wool.
- B. A national wool collection centre, with regional collection points, for farmers who do not want to commercialize their own products but do not want to pay for the disposal of their wool as required by today's European legislation. This centre does not have to collect only wool. It could be organized to accept all animal fibres, including alpaca, angora, mohair, cashmere.
- C. Wool promotion, using modern communication systems to get the message to the general public that wool is natural, ecological, sustainable, and good for your health!
- D. Wool tourism. The renovation of a historic textile factory and its adaptation to be able to operate when today's demand is for less industry but more cultural and territorial know how.

More Positives

The International Wool Textile Organisation held its annual conference in June here in Italy and several “untraditional” speakers shine light on other aspects that will be important in the future.

Improvements in animal welfare required by European legislators and the consumers continuous “search for the truth” is going to have a positive effect on the treatment of animals and indirectly the quality of the wool, if the correct guidelines are put in place. A more ethical approach to sheep farming is being encouraged, and this can be of further benefit to all. A good shearer, fully trained, is required to ensure the job is done satisfactorily.

Improvements in personal health are also being promoted at governmental level, especially with the prospect of an increasingly ageing but active society in all nations worldwide, and natural fibres are already playing active roles in this. Wearing garments from natural fibres, be they animal or vegetable, is good for your health.

A reduction in heating bills can be obtained not only by wearing wool garments but also by using wool carpets and furnishings. Wool Insulation panels for the home are already on the market.

The National Health and Textile Association has its headquarters in Biella. It embraces, trade associations, the National Healthcare System and consumer associations. It works in close cooperation with the Italian Ministry of Health on problems related to the relationship between textiles, wellbeing and health. Although not yet common knowledge, many imported textile garments contain chemicals which are not permitted to be used in European processing, and this is a legislative loophole that must be closed diplomatically, to avoid accusations of protectionism etc.

Conclusion

Europe can no longer afford to consider wool and other fine animal fibres as being a simple byproduct of the meat and milk industry. It is a resource which was highly valued and created untold wealth for cities and nations for centuries until the birth of synthetic fibres. Only 1.3% of fibre that is consumed today in the world is wool and it is important that the sheep returns to its former glory, supplying not only the meat industry but also the textile industry with a fibre that has many technical properties but is also natural, ecological and sustainable.



PROCESSING AND COMMERCIAL OPPORTUNITIES FOR
EUROPEAN ANIMAL FIBRE PRODUCERS

6° European Symposium on South American Camelids
2° European Meeting on Fibre Animals

Nantes 2013

Current situation on european wool fibre production

- Bulk of european greasy wool goes to Asia for processing, and returns to western markets as finished products.
- Farmers revenue from wool doesn't cover shearing costs in many parts of South Western Europe.
- Farmer receives neither financial incentive nor informed communication to allow him to make decisions on how to improve his wool and it's value.
- European wool textile industry no longer big enough to absorb quantities available. (most is totally unsuitable for high quality cloth and knitting)
- Mass of consumers do not care what fibre is being used.

Strong marketing words that can be applied to wool

- Organic (on the farm, not industrial processing)
- Low Carbon Footprint (if correctly interpreted)
- Favourable Life Cycle Analysis (if correctly interpreted)
- Ecological
- Sustainable
- Natural

Negative points

- Very few people, along the whole wool pipe line to the final consumer, knows this.
- Wool is classified as a category 3 byproduct, not a raw material . Psychologically damaging.
- Sporadic partisan wool promotion.

Tomorrows consumer market for the small animal fibre producer

- A growing sector of consumers desire Natural, ecological and sustainable products.
- The wool grower can supply these products.
- He needs a processing system for small lots

Remember that it is Impractical for large global industry/distribution to follow this niche market. Insufficient numbers to merit interest.



Non profit organization offering wool services to the animal fibre grower (wool, alpaca,cashmere,mohair, angora/other).

Founded in 2008, consists of Specialists in all stages of wool processing.

Commission Wool Processing

National Wool Collection Centre

Wools of europe /Friends of wool association

The Wool Box

Commission Wool processing

- From the greasy unsorted fleece to the final product.
- All processing takes place in the Biella textile district, reknown worldwide for the quality of it's cloth and yarn.
- Knitting or weaving yarn, hand knitting balls, natural or chemical dyes, scarves, blankets etc.
- 100% traceability

National Wool Collection Centre

Collection, selection, presspacking, testing, and sales.

Advantages for

- the farmer
- The animal
- The environment
- The buyer
- The final consumer



WOOL SELECTION

Wool Promotion

IF THE CONSUMER DOES NOT RECEIVE THE CORRECT
INFORMATION , HE WILL NOT BUY WOOL



WOOLS OF EUROPE EXHIBITION

FRIENDS OF WOOL ASSOCIATION

- To promote cultural , educative and sporting activities based on wool and wool production and the redevelopment of the Historic Fratelli Botto Woollen Mill, which closed in 1992.
- To promote the cultural and immaterial dimensions of wool traditions in the Cervo valley and other Biella valleys, using the expressive forms of art and innovative technological communication, both audiovisual and multimedial.



BOTTO WOOLLEN MILL

The Wool Race



Wool Stories



More Wool Stories



Further Positive Aspects

- International Wool textile Organisation.
- European directives on animal welfare.
- Energy saving – wear wool.
- National Health and Textile Association.

THE WOOL BOX

A commercial company selling autoctone wool for knitting, weaving and felting using the internet as a sales platform and teaching new generations how to work with wool, either as a hobby or for a small enterprise.

Conclusion

The consumer likes the product – natural, ecological and sustainable.

The grower has the fibre, year after year.

There is still wool processing available in Europe (though limited).

The large scale global wool industry has little interest in this sector.