Pyrenean wools: how improving the organisation of the upstream and downstream sectors in the massif

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https://www.morenoconseil.com

http://atelierpurelaine.com/laine-brute/

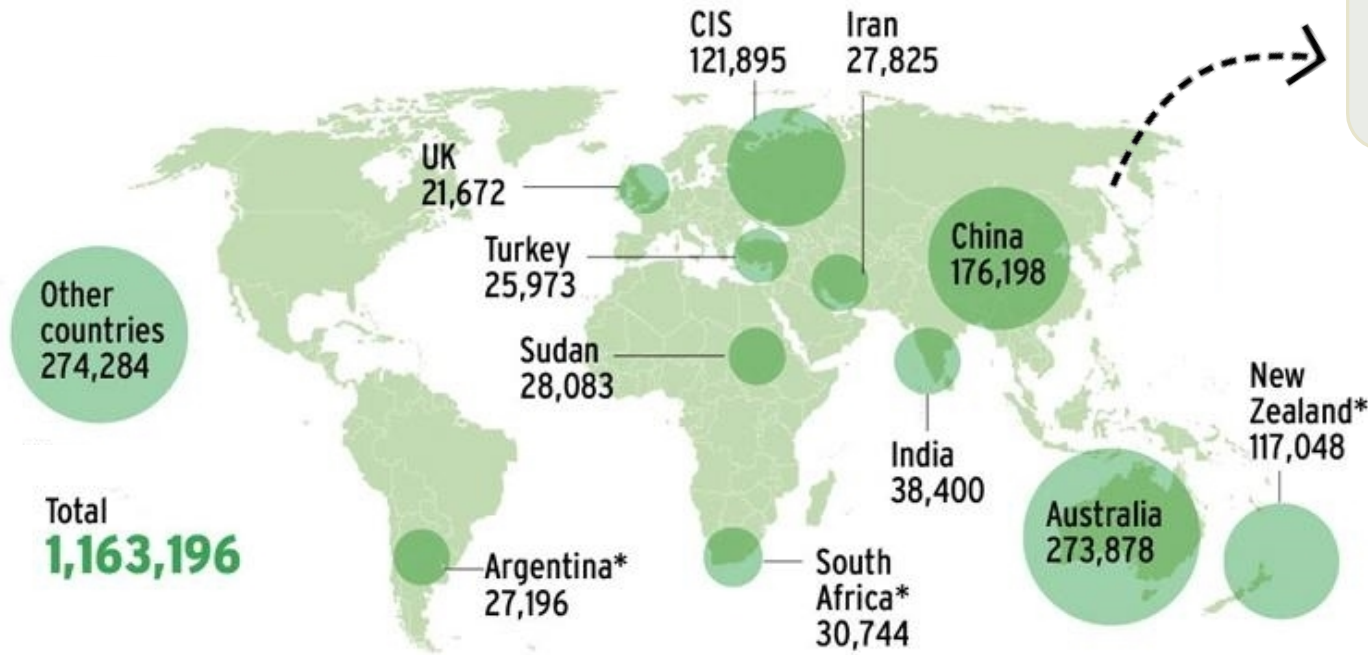https://www.toutagri.fr/article-mieux-connaitre-la-tarasconnaise/

A sector under pressure due to globalization

Map of the word production of wool (tons).
*Production saisonnière. Source : IWTO Wool Statistics 2015

China

- Leading importer of French wool
- Covid closes borders

Australia and New-Zealand

- 33% of world wool production
- Main wool breeds: Merino

Merinos

https://www.dormeuil.com

A crisis situation: price of sheep's woll falling around 0,10€/kg. Closure historic markets (China, North Africa…). Shearing cost are not covered. Wool not even collected in some farms…

An action plan: identify the factors that influence wool production (volume and quality) in order to improve its market value and guarantee better remuneration for breeders?

Pyrenean wool: which breeds are raised in the Pyrenees and what are their characteristics?

Production factors: what factors influence the characteristics of wools?

Pyrenean livestock farming: where are the production basins and what are the farming practices?

Markets: what outlets exist and for what types of wool?

Study governance and working hypotheses

1 technical committee (23 members)

3 working hypothesis

1 **Pyrenean wool has a wide range of characteristics and qualities**, reflecting the diversity of Pyrenean territories and farming systems.

2 - **Strategies for adding value to wool vary;** breeders suffer from a lack of visibility in the short, medium and long term, and sometimes even from a lack of outlets.

3 - Farmers are keen **to find outlets for this product**, and are willing to commit to quality improvement initiatives **if remuneration is forthcoming**.
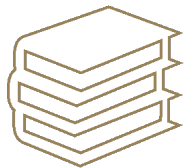
Objectives and methodology

Current situation

Characterisation of wool areas

Diagnostic of practices and typology

Bibliography

Expert interviews
n = 10

Maps

ARSOE

Statistics

Survey
n = 175

A diversity of breeds

Ewe Aure et Campan

Ewe Castillonaise

Aries Lourdaise

Aries Tarasconnaise

Charmoise · Suffolk · Rava · Caussenarde · Mouton de Ouessant · Rouge du Roussillon · Manech Tête Rousse · Barégeoise · Scottish Blackface · Romane · Mourerous · Solognote · Bizet · Tarasconnaise · Aure et Campan · Berrichon · Croisée · Lacaune · Corse · Brigasque · Basco-Béarnaise · Manech Tête Noire · Lourdaise · Montagne Noire · BMC · Mérinos · Charollais · Clun Forest · Thônes et Marthod · Castillonnaise · Ile-de-France

Word cloud showing the breeds of Pyrenean breeders
and their proportion.
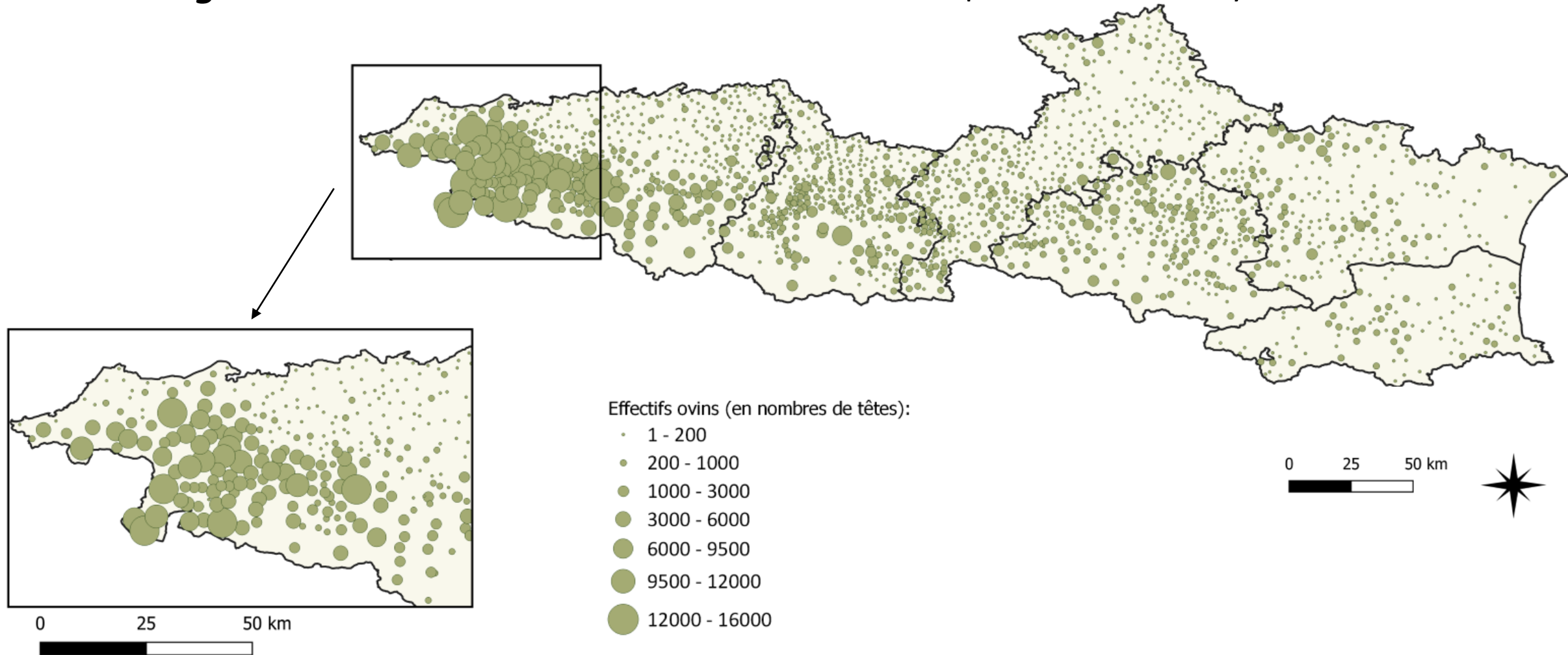Source : Online questionnaire

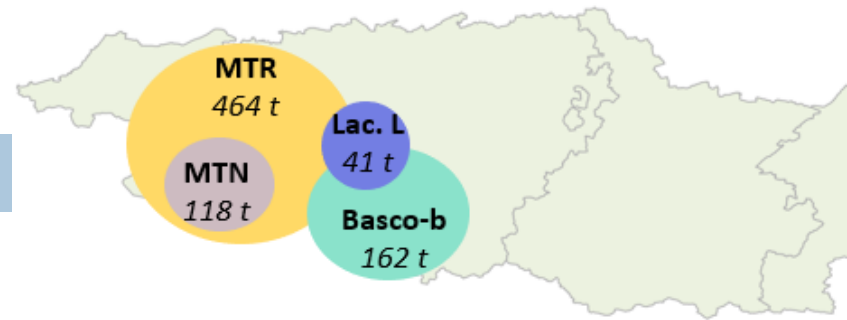# Present throughout the Pyrenees, but in heterogeneous areas

Distribution of sheep numbers in the Pyrenees in 2021

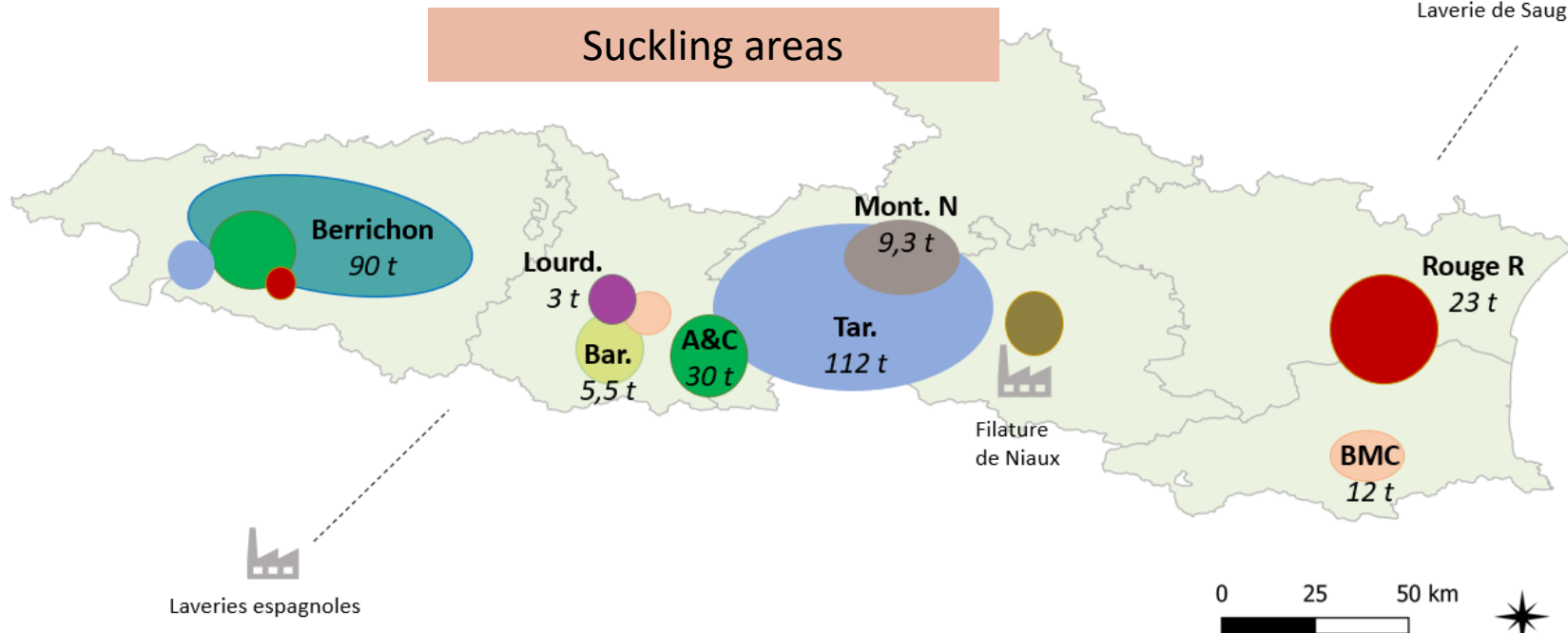Effectifs ovins (en nombres de têtes):
- 1 - 200
- 200 - 1000
- 1000 - 3000
- 3000 - 6000
- 6000 - 9500
- 9500 - 12000
- 12000 - 16000

Present throughout the Pyrenees, but in heterogeneous areas

Dairy areas

Suckling areas

MTR
464 t

Lac. L
41 t

MTN
118 t

Basco-b
162 t

Laverie de Saugues

Berrichon
90 t

Lourd.
3 t

Mont. N
9,3 t

Rouge R
23 t

Bar.
5,5 t

A&C
30 t

Tar.
112 t

BMC
12 t

Filature de Niaux

Laveries espagnoles

0   25   50 km

Schematic location of the basins of the various breeds present in the Pyrenees in 2021.
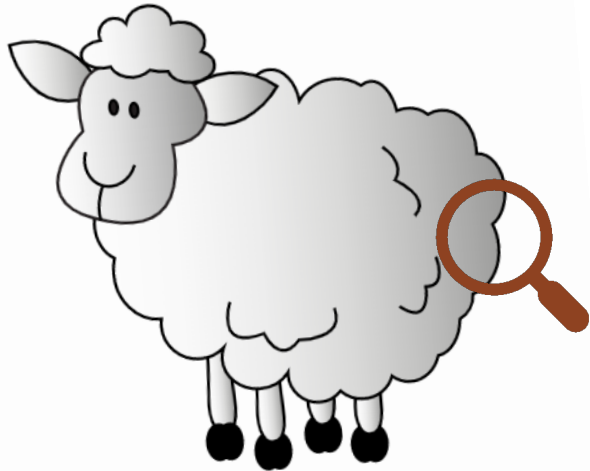
Personal figure, not exhaustive.

Fleeces with a wide range of characteristics

Overview of Pyrenean breeds (16)

Fleece color:
White, Saffron, brown, beige, russet

Fiber length:
4,5cm to 30 cm

Fiber diameter:
23μm to 40μm

Fleece weight:
750g to 3,5 kg

Example of Manech tête noire

Fleece color:
Saffron

Fiber length:
22 cm to 30 cm

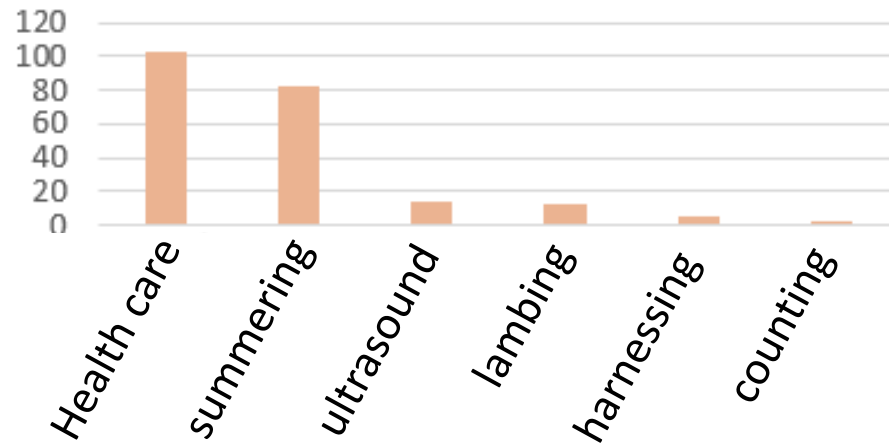**Fiber diameter:**
38 μm

Fleece weight:
1,7 kg

https://www.morenoconseil.com

Varied practices

Ewe marking (n=175)

Who?

150 breeders (86%)

For ?

(Bar chart, y-axis 0 to 120)
- Health care
- summering
- ultrasound
- lambing
- harnessing
- counting

How?

Pencil (38%) Paint (32%) spray can (30%)

Grazing areas used by farmers (n=175)

Number of farms by type of grazing area

(Bar chart, y-axis 0 to 200)
- Meadows
- Rangelands
- Moors
- Woods
- Vineyards / orchards
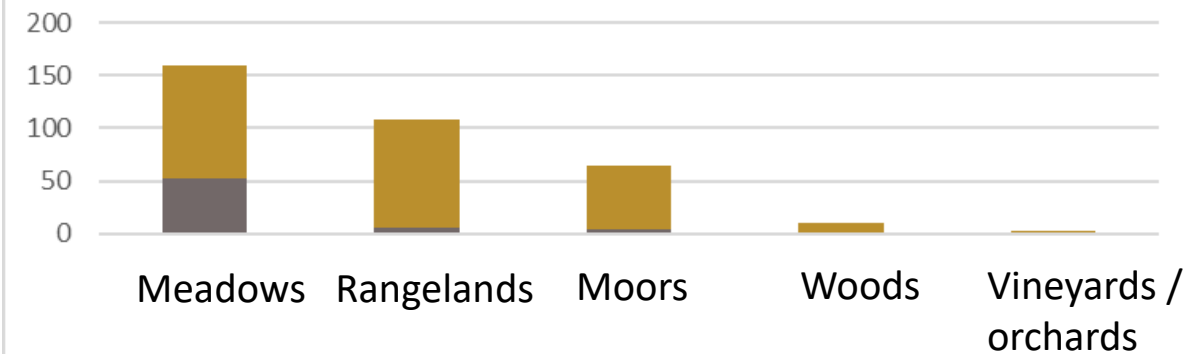
■ farms with various types of grazing area

■ farms with only one type of grazing area

Varied practices - but common expectations

Sold 13%
Given/gift 12%
Used 5%
Throw away 25%
Other uses 22%
Stored 23%
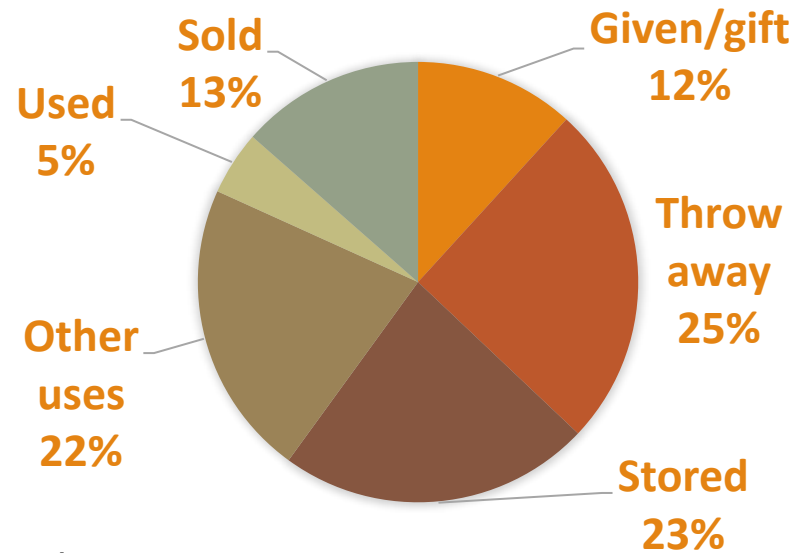
What happens to wool on the farm? Source : surveys

Actual and target prices for wool

Source : surveys

About a payment grid

Payment grid – 6 principles :

1. **Progressive price**
2. **A price range**
3. **2 types of grid**
4. **Detailed feedback to the breeder**
5. **Malus**
6. **Integration of thoroughly washed wool yield**

	Nb answers	Av.	Méd.	Min	Max
Current selling price for breeders who have sold their wool (€/kg)	36	0,63	0,4	0,05	2,6
Asking price for clean wool	104	2,23	1,75	0,4	20
Minimum price for wool harvested without constraints	105	1,32	1	0	10
Current shearing costs	172	1,8	1,8	0	6

Varied practices and situations: Introducing the 3 clusters

Used variables (9)
- Number of mowers
- Mowing deck
- Mower deck cleaning
- Sorting
- Selling price per kilo
- Interest-investment
- Minimum price for clean wool
- Evaluation of cleanliness level
- Evaluation of effort level

Illustrative variables
- Breed
- Shearing period
- Wool fate
- Transport
- Training
- Level of satisfaction
- Importance given
- Postal code
- Workshop location

Distribution of breeders within the 3 typological groups

Disenchanted breeders: (58 farmers)
- No wool training
- Little attention paid to wool cleanliness
- Assessing their wool as currently dirty, with a high level of effort required to improve it

Breeders mobilized but disappointed: (78 farmers)
- Good estimate of wool cleanliness, so little effort required
- No sorting
- No outlets, store wool
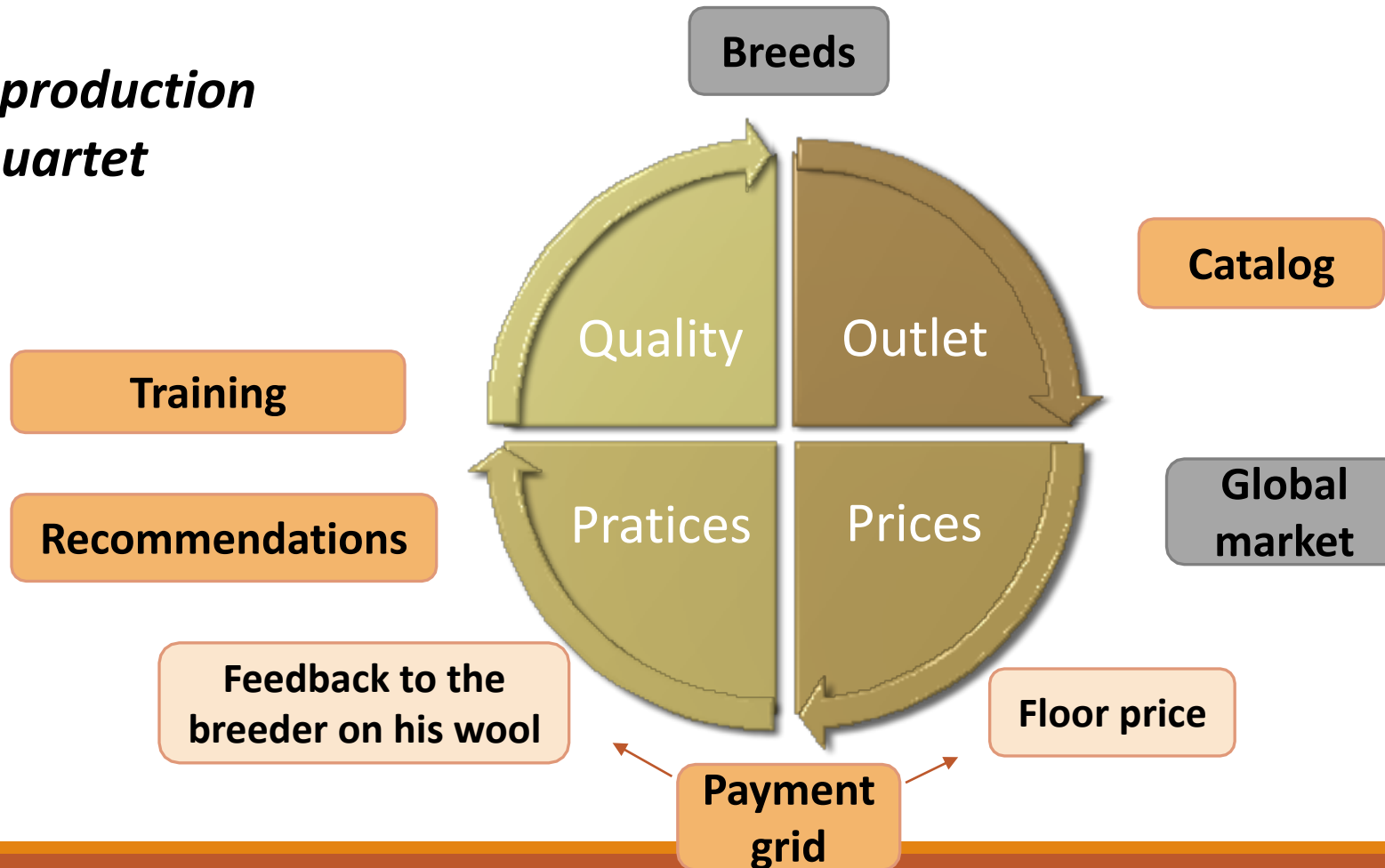- Generally dissatisfied with their situation

Committed and paid breeders: (39 farmers)
- Good mowing and sorting practices
- Give importance to cleanliness and take action
- Better value wool
- Are more satisfied

Conclusion

Ways to act on the factors that influence wool production (in terms of volume and quality) to enhance its value on the market and guarantee better remuneration for breeders

Wool production quartet

Breeds

Catalog

Training

Quality

Outlet

Global market

Recommendations

Pratices

Prices

Feedback to the breeder on his wool

Floor price

Payment grid

What role for wool in the future ?

Thank you for your attention

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