



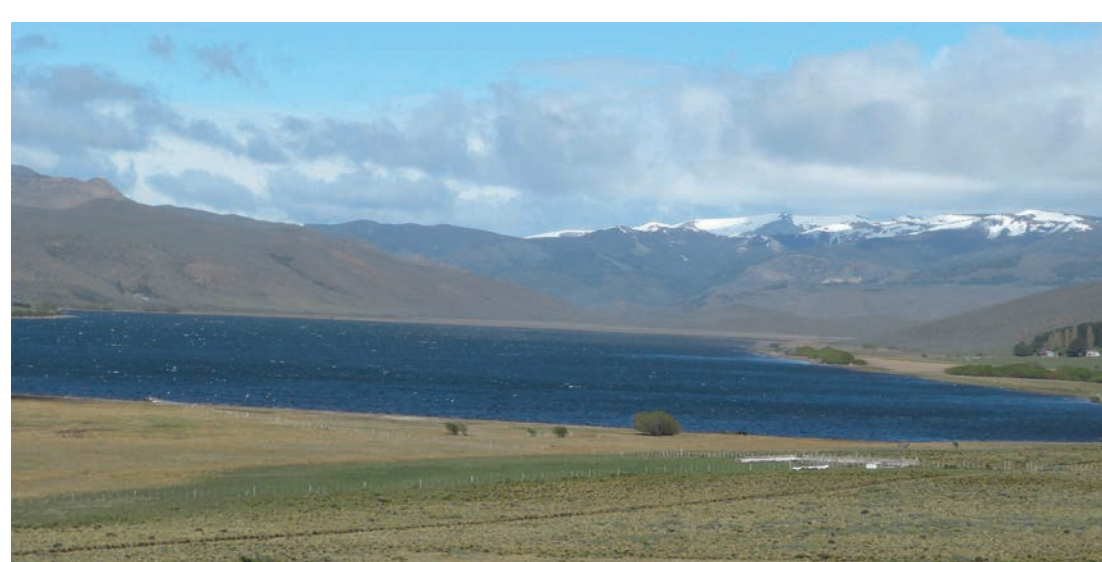
Organic opportunities and challenges: The next generation of the wool industry

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ORGANIC MARKET

➔ The market for organic food and drink is growing worldwide with a global value of \$72 billion in 2013¹; organic textiles represent less than 5% of this market.

➔ Organic cotton is the most important fibre in fashion, apparel, household and personal care products. Organic wool provides a growing opportunity.

➔ There is increasing consumer interest in and awareness of sustainable, ethical, and environmentally sound processing in the textile and fashion value chain. Organic sheep and wool production represents an opportunity for growth in the global wool sector that responds to this interest.

➔ Wool has many valuable properties that are useful in fashion, leisure and sports wear. Many businesses are successfully supplying organic wool products into a range of markets around the world.



ORGANIC SHEEP PRODUCTION

➔ Around 1% of the world's sheep are organically managed with a total flock in 2013 of almost 12 million² (see Table 1). More than half the sheep are in Asia and with almost all in China (data from China has only been available since 2013). In Europe, 4.4% of the sheep are organically managed as are 3.5% of the sheep in the UK. A 10-15% premium for organic wool can be achieved over non-organic prices.

➔ Organic sheep production standards require high welfare systems. Organic feed, good husbandry and permitted veterinary inputs maintain health and allow economically viable production.

➔ Internationally, standards based on common organic principles set by IFOAM-Organics International³ are implemented through regulation in Europe, USA, Canada and around the world⁴. On farm organic sheep production is inspected and verified by independent organic certification bodies⁵.

ORGANIC SHEEP NUMBERS – GLOBAL ²

Region	Sheep (million)	% Total
Africa	0.01	0.08
Asia	6.30	53.41
Europe	4.45	37.53
Latin America	1.05	8.90
USA & Canada	0.01	0.08
TOTAL	11.82	100



FUTURE PROSPECTS AND CHALLENGES

➔ Organic sheep production provides a good-practice example of a sustainable and animal welfare-friendly system. On-farm, specific challenges relate to the implementation of the organic system with regard to veterinary management and feeding according to established organic standards. Effective methods are available, and these provide confidence to farmers considering conversion to organic, enabling them to exploit the opportunity for organic wool production.

➔ GOTS provides detailed processing standards that can contribute to environmental protection during the processing of wool⁶. With new techniques for processing that can further reduce the environmental impact, the future prospects are good for the production of wool products for fashion, apparel, baby wear and home textile products. GOTS has recently introduced a tool for monitoring water and energy use during processing – offering the potential to benchmark and reduce the environmental impact of organic processing.

➔ Developing the market for organic wool products and communicating the benefits of organic production and processing of organic wool is both a challenge and an opportunity for businesses keen to invest in high quality and differentiated products that respond to consumer demand.



➔ Producing high quality and traceable organic wool products that are attractive to consumers meets a growing demand for organic textiles, and represents an opportunity for the wool industry worldwide.

REFERENCES

¹ FiBL and IFOAM (2014) World of Organic Agriculture – Statistics and Emerging Trends. See <https://www.fibl.org/fileadmin/documents/shop/1636-organic-world-2014.pdf>

² Data Source: Research Institute of Organic Agriculture (FiBL), Organic Sheep Numbers Global 2011-2013. FiBL, Frick, Switzerland. See www.organic-world.net. Last updated: 17/02/2015

³ IFOAM – Organics International Principles of Organic Agriculture. See <http://www.ifoam.bio/en/organic-landmarks/principles-organic-agriculture>

⁴ IFOAM – Organics International Family of Standards. See <http://www.ifoam.bio/en/organic-landmarks/ifoam-family-standards>

⁵ IFOAM – Organics International. Global Organic Certification Directory. See <http://www.ifoam.bio/en/global-organic-certification-directory>

⁶ Global Organic Textile Standards - Version 4.0 March 2014. See <http://global-standard.org/the-standard.html>