



*Performance Report*

**Wool Research, Development and Promotion  
Trust Fund**

**October 1, 2009 - September 30, 2010**



**American Sheep Industry Association**



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## Executive Summary

### Background

With roots dating back to 1865, the American Sheep Industry Association (ASI) is a federation of 45 state associations representing sheep producers nationwide with a common goal to promote the well being and profitability of the U.S. sheep industry. From the East to the West, farm flocks to range operations, ASI works to represent the interests of more than 82,000 American sheep producers.

In 2000, the U.S. Congress established the Wool Research, Development and Promotion Trust Fund to support wool activities. Aimed at increasing the competitiveness of American wool, ASI established the American Wool Trust Foundation (501c5 corporation) to implement the wool programs. The foundation delivers programs and services via contract with ASI, which has the most extensive leadership, communications and program delivery infrastructure in the U.S. sheep industry.

**ASI oversees the funds that support the three primary Wool Trust Program interests:** quality improvement, dissemination of information and development and promotion of U.S. wool. For the fiscal year (FY) Oct. 1, 2009, through Sept. 30, 2010 – the year covered in this report – the Wool Trust Foundation was awarded \$2.25 million. Additionally, the

U.S. Department of Agriculture approved a new Memorandum of Understanding with ASI for wool programming during the FY 2010 fiscal year.

### U.S. Market Situation

Domestic wool-apparel production in the United States over the past decade has been relocated into other lower-cost countries, as is the trend with all textiles. Exports now account for 60 percent to 70 percent of domestic wool production.

### Objectives Addressed by the Wool Research, Development and Promotion Trust Fund

- ✓ *Development and promotion of the wool market*
- ✓ *Improve the quality of the wool produced in the United States, including wool production methods*
- ✓ *Disseminate information on wool improvements to U.S. wool producers*

This fiscal year, the strong military wool demand has been critical to U.S. wool producers in light of the international wool market, which had taken a hit due to the worldwide financial crisis.

The U.S. military uses 20-25 percent of all U.S. wool and announced several large clothing-related contracts this fiscal year that have or will use a significant amount of American wool.

Although orders were lower during the armed conflicts in 2007-2008, the U.S. military continues to be a major U.S. customer for wool apparel. Fire-resistant wool apparel has become a popular product with the military, as synthetic materials burn easier when exposed to heat and can even melt onto a soldier's skin, causing them harm and making those fabrics less desirable than fire-resistant wool in war zones. The purchase of shrink-resistant treatment equipment that allows low-cost treatment that renders wool machine washable and dryable in the field environment with little to no shrinkage is expected to facilitate the use of U.S. wool for the military.

Survival for the domestic textile industry lies in the development, production and marketing of new products.

Leading manufacturers have introduced new concepts such as embedding treatments directly into fibers or coating fabrics with chemicals that bond to them on a molecular level, providing fabrics that are antimicrobial, washable and fire resistant.

Also, the markets for fashion and sports clothing have started to emerge as greater innovation is seen in the specialized sports goods arena. There is a clear message that consumers will pay more for innovative products.

Several outdoor apparel manufacturers have continued to utilize wool to meet consumer demands for a natural, high-performance fiber, and FY 2009/2010 saw that trend continue as numerous other companies began manufacturing products for the wool-apparel market. Wool has moisture-managing, temperature-regulating, fire-resistant and odor-resistant properties that make it perfect for any outdoor apparel, such as cold-weather base layers, biking jerseys and socks, just to name a few.

Also, wool is a fiber of choice year round not just for cold weather. For example, companies like Ibex, Icebreaker, Patagonia and Smartwool have outdoor wool apparel lines, and many are also offering casual, lightweight wool products for everyday wear in summer months.

The consumer demand for sustainable products that are environmentally friendly and come from renewable resources has continued to grow considerably in this past fiscal year. Naturally, as wool is a sustainable fiber, it is becoming a go-to fiber for environmentally conscious manufacturers and consumers. As part of ASI's objectives, it has continued to research new ways to meet the demand for a safely grown and manufactured product.

One example has been ASI's work with Maine-based company Ramblers Way, which with several years of ASI's assistance, has been able to identify the wool it needed, meet and directly contact growers to access this wool and create a line of 100-percent wool underwear garments.

## World Wool Situation

ASI programs have been successful in achieving significant interest and purchases from major wool-processing countries around the world in recent years.

The past several years have seen some significant changes in the wool market, but by the end of FY 2010, the market was on a significant upward correction from years past. The financial crisis beginning in 2008 triggered a drop in most currencies against the U.S. dollar and the sale of virtually all commodities. Overall, the continuation of the effects of the 2008 financial crisis was felt in the wool markets heavily until around March/April of 2009, when wool prices began to improve; however, while prices improved, a weak trading environment remained until September 2009, when prices and trading appeared on an upswing. As FY 2009/2010 progressed, the weak international demand for wool began to improve significantly, and despite the weakness of the U.S. dollar, prices for U.S. wool reached 13-year highs in U.S. dollars in late 2010.

Importantly to the wool industry, while the textile industry is typically a leader into recession they also are a leader out of it. The positive trends in both the economic status of major wool-consuming countries as well as growth in textiles, including wool textiles, are both looked to as a positive indicator for continued economic improvement in the upcoming year.

The world wool supply has decreased. In 2008/2009, the largest wool producing country, Australia, saw its sheep population fall to the lowest numbers in decades. The decrease was blamed on a harsh drought that caused the liquidation of many sheep flocks for the past several years. New Zealand, another large wool supplier, has experienced similar reduction in sheep numbers in recent years, due to both drought and conversion of sheep farms to dairies. However, internationally strong lamb and wool prices have encouraged several countries, the United States included, to re-build flocks to take advantage of the markets.

As the wool industry has taken a more positive turn from the past years' financial crisis, ASI's International Marketing Program continued to be on the forefront of expanding foreign market access for U.S. wool. The maintenance of a diverse market has been a key to minimizing the effects of the financial condition by keeping markets open in a variety of countries.

The improved market conditions and ASI's aggressive work to expand international markets translated to increased exports for FY 2009/2010 over the previous fiscal year by 37.8 percent. As with years past, China continued to play a big role this fiscal year in the wool processing and manufacturing sectors, buying 5.6 million pounds of clean U.S. wool in FY 2009/2010, representing a 34.6-percent increase over last fiscal year. However, renewed interest from Europe and India is credited as a major factor in the renewed strength in the wool market.

India is shaping up to become a major player in the wool-textile manufacturing industry. It continues to be



the second largest importer of U.S. wool behind China, buying approximately 2 million pounds of clean wool in 2008/2009, representing a 30.1-percent increase over the previous fiscal year. The country's growth into this industry is expected to continue and is seen by ASI as one of the important markets to balance the influence of the Chinese market. Marketing programs for U.S. wool were also carried out in Western Europe, South America, Mexico and Canada.

## Summary of Achievements

It is important to note that the domestic textile market remains an important customer, and partnerships with this market segment helped U.S. growers realize higher wool prices.

**Objective:** Assist U.S. wool producers in the development and promotion of the wool market (domestic market)

- Domestically, ASI continued to build its knowledge and resources to gather information about the United States' largest domestic customer, the U.S. military. Over the past year, ASI worked with and expanded its contacts with military agencies, their textile suppliers and industry groups to educate and promote the use of wool.
- This year saw several wool-related projects take shape:
  - ASI worked closely with the Sheep Venture Company (SVC) in the purchase and installation of a wool shrink treatment production line at the Chargeurs Wool USA Inc., top-making mill in Jamestown, S.C. The new line is expected to begin delivering shrink treated wool to customers in January 2011 and is available to all domestic worsted spinners and mills.
  - The U.S. military, in particular the U.S. Army, has seen the value of wool for the soldier's safety and comfort and are interested in ASI and SVC's efforts related to wool shrink treatment resulting in the funding of Phase I and Phase II Small Business Innovation Research grants. The Phase I grant, to research and implement a shrink treatment process, completed in July 2010. The Phase II proposal is expected to be granted in 2011, and this project will allow production of new, innovative garments using washable wool from the new line to be developed for the Army's Extended Cold Weather Clothing System.
  - For the first time in over 50 years, wool returned to Army field gear through inclusion in the Fire Resistant Environmental Ensemble. The Army and manufacturers alike sought ASI's



Top: The Wool Treatment Production Line, Superwash, in construction at Chargeurs Wool USA Inc.

Bottom: Pieces of the U.S. Army Extended Cold Weather Clothing System.

expertise in all areas of wool processing during the Research and Development and Low Rate Initial Production phases of this billion-dollar contract.

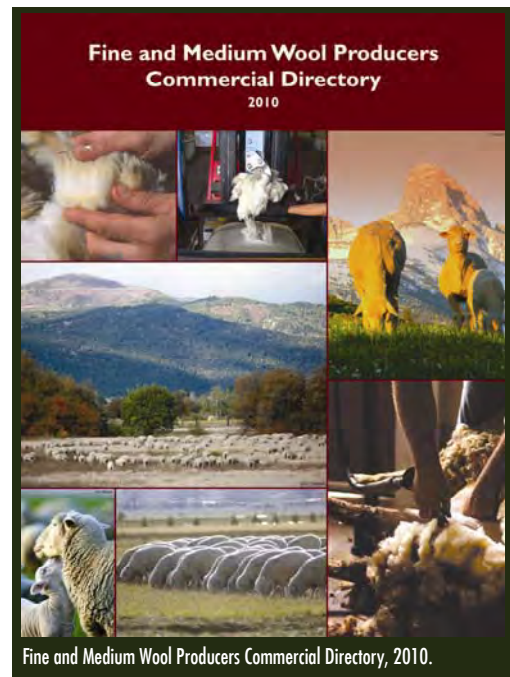
- Partnerships continued with military and commercial interests to develop anti-microbial treatments for wool that will qualify for mill trials.

ASI is now recognized as the innovative U.S. leader in wool product development by military offices and industry alike, and representatives are very active in promoting wool products at conferences and meetings for different services.

**Objective:** Assist U.S. wool producers to improve the quality of the wool produced in the United States, including improving wool production methods

### New Technology and Wool Quality Improvement

- ASI continued to improve the quality of the wool produced in the United States through the continued investment in and education on the use of the Optical Fiber Diameter Analysis 2000 (OFDA2000) equipment, staple length meters, a staple breaker, grab sampling equipment and also facilitated bringing wool presses to U.S. wool pools and warehouses.
- Warehouses and buyers have been trained to use the Australian Wool Exchange Description (AWEX-ID), used for appraisal and description of non-measured characteristics of greasy wool by major international wool buyers, which helps producers understand the value of their wool clip and international buyers better understand U.S. wool quality.
- Participated in state shearing forums to encourage quality improvement. Wool warehouses reported that positive results in the quality of the wool were seen as soon as one day after the forums were held.
- Producers and growers continue to adopt the practices and procedures of the Certified Wool Clip Program for shearers and wool producers. Voluntarily, producers, sheep shearers and several industry supporters participated in the program in the fiscal year and sent in the documentation for listing.
- ASI continued to update its sheep shearer database and formulated plans for advanced shearing schools to be held in 2011.
- ASI printed a directory of fine- and medium-wool producers as well as wool contacts to encourage genetic advancements in the U.S. wool industry.
- ASI held preliminary testing trials regarding the use of paint and chalk brands applied to wool on live sheep for identification purposes to allow producers a chance to adjust management practices to keep wool the highest quality possible.



### Quality Assurance

- Worked with industry and academic representatives from Australia, New Zealand and the United States on the prioritization and implementation of sheep genomics research.
- Continued the implementation of the national Sheep Safety and Quality Assurance program for producers. Several hundred producers have been trained and certified in SSQA Level I, and trainers are working with producers in several states on SSQA Level II processes.
- Participated in the National Animal Health Emergency Management Steering Committee (now a committee under the U.S. Animal Health Association) - a group of federal and state government officials, as well as industry representatives who are coordinating a strategy to more effectively and efficiently deal with animal health emergencies.

### Wool Outreach

- The Wool Outreach Program expanded the reach of ASI's wool improvement and marketing activities by spurring state entities to develop wool programs. It is notable that with this tenth year of wool outreach funding, many states with prior participation are expanding their activities and conducting more projects with the same amount of funds. They are also carrying out a broader range of programs, which are more innovative.

### **Objective:** *Disseminate information on wool improvements to U.S. wool producers*

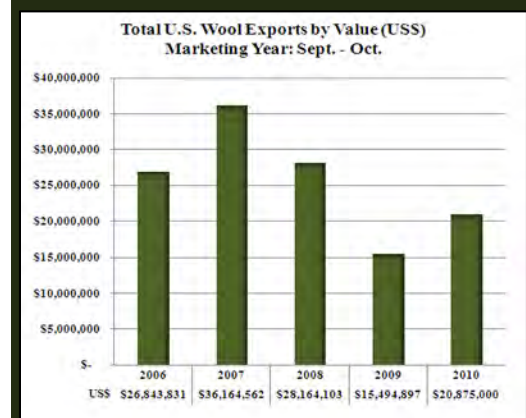
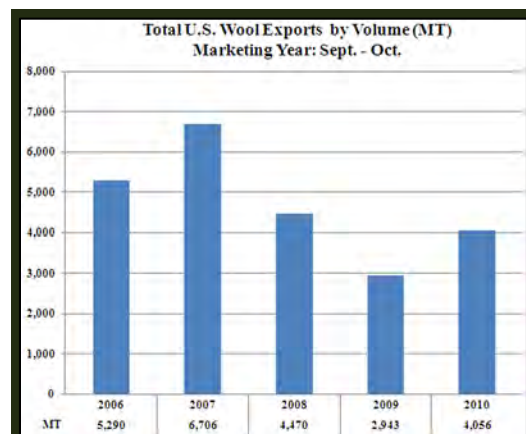
- General areas of producer communications included wool quality improvement methods, new wool industry technology, animal health issues and their effect on wool, information on pricing and marketing opportunities.
- Producer communications included the production of ASI's monthly tabloid, the *Sheep Industry News*; the *ASI WEEKLY*, the association's weekly newsletter; press releases and other materials that were disseminated to producers and/or the public and media. Articles from both the publications were routinely reprinted in livestock- and agricultural-oriented publications. In addition, this information was spread via the ASI and *Sheep Industry News* websites and the social media networks, Twitter and Facebook, which were incorporated in the communication plan to further disseminate wool- and industry-related information.
- Several media pieces were created to inform the wool and sheep industry of ASI programs.
  - Wool *Fast Facts* were updated to reflect the most current information as reported by the U.S. Department of Agriculture (USDA).
  - As part of strategic planning, a panel of industry experts participated in the RFD-TV LIVE program where they discussed the high prices the industry has experienced in the wool markets and encouraged others to raise sheep. The ASI LIVE show was viewed by 93,000 households and 118,000 adults age 18 and older.
  - Articles and information for the Certified Wool Program and genetic improvement were published in the *Sheep Industry News* to encourage more producers to manage the quality of their wool.



**Objective:** Assist U.S. wool producers in the development and promotion of the wool market (international market)

- Programs are showing a significant return on investment in an improving global economy following several years of a financial crisis. The creation of a more marketable U.S. wool clip is a huge endeavor and one that is long term in nature. The industry has successfully found new sales outlets while U.S. quality improvements are paying off with increased buyer interest. This speaks well for the long-term impact of projects carried out under the Wool Trust programming.
- As the economy improves, the new customers and new sales developed by ASI's program provided continue to support U.S. exports during the year. For the first year in several, U.S. wool exports have seen an increase in demand. From October 2009 to September 2010, wool exports were 8.97 million pounds clean, a 37.8-percent increase compared to the previous year (statistic source: USDA).
- This ASI program is successfully achieving its objective of redistributing the U.S. wool sales base. Rather than having one or two large companies – in the United States and abroad – purchasing U.S. wool, there is now a diverse customer base from many countries. For example:

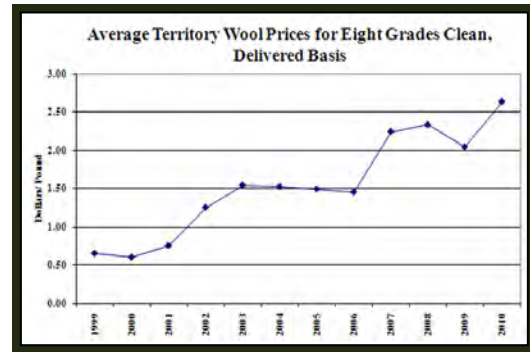
- China continues to be the largest customer for U.S. wool. This fiscal year, China increased its purchases of U.S. wool from 4,165,000 pounds last fiscal year to 5.6 million pounds this year. Greasy wool purchases continued to dominate, and 99 percent of all exports to China were in this form. Last year, three new buyers from China purchased U.S. wool for the first time. ASI placed a Chinese language advertisement in a major Chinese wool textile magazine to support the international advertising campaign to increase the awareness of U.S. wool.
- As part of the wool-type diversification strategy, ASI introduced a short wool program for China to promote China's use of woolen system wools. This has been a factor in the increase in the exports of short wool types to China and, in turn, increasing total U.S. wool exports to China.
- India continues to be a bright spot, increasing its U.S. wool consumption by 30.1 percent over the previous fiscal year. This has improved ASI's



ASI extracted Mexico wool top figures from the final numbers, as the top is imported into the United States from Australia and then re-exported to Mexico.

contact and service in India and was key in ASI being able to conduct a new market segment trial (shawls) completed in 2008 and now being used as an example to show other shawl makers the potential of U.S. wool.

- Another factor that made these export achievements possible was the availability of valuable programs from USDA's Foreign Agriculture Service and the assistance of this agency.



It should be noted that the major strength of all of the programs in this report is synergy. All projects were carefully designed to address crucial points of the wool industry throughout the production and marketing chain. Thus, the overall program owes its strength and measurable results to the way each element supports and builds upon the others.



## Program Expenditures

### Summary

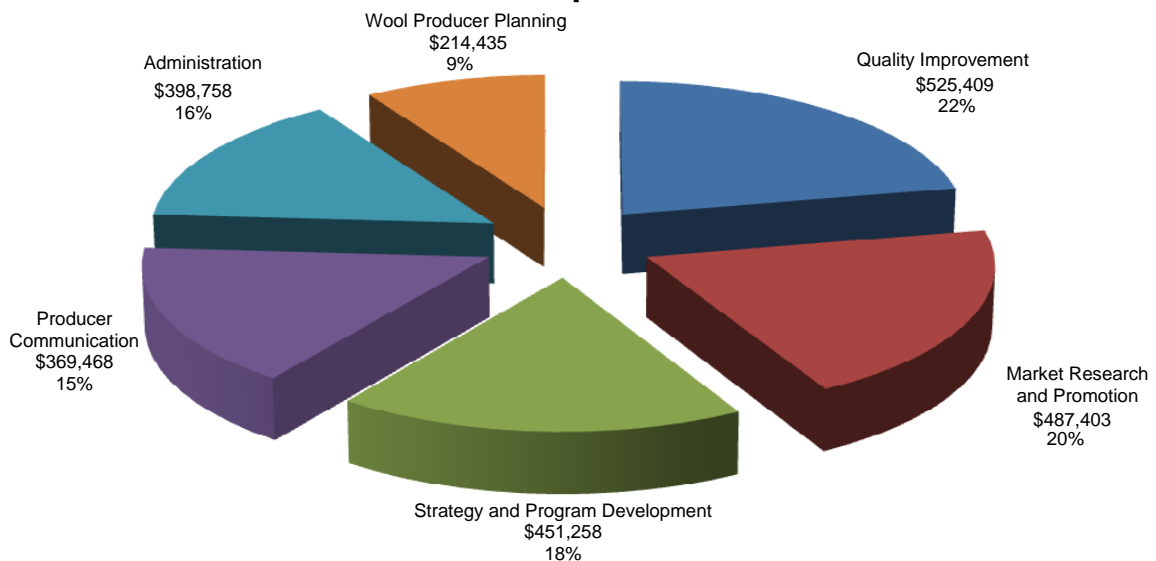
As in prior years, the majority of funds were spent on programs that directly impacted U.S. wool quality and marketing. The budget funds focused in either quality improvement programs or programs that sought out new markets and uses. Together, these two types of programs helped to develop new market options for U.S. wool growers and improve quality. Additional programs, such as communications and planning, provided essential support without which the overall program could not be conducted. The

following chart shows Wool Trust expenditures this past financial year.

### Wool Trust Goal Addressed by This Project:

- ✓ *Development and promotion of the wool market*
- ✓ *Improve the quality of wool produced in the United States, including wool production methods*
- ✓ *Disseminate information on wool improvements to U.S. wool producers*

### October 2009-September 2010 Wool Trust Expenditures





# Market and Product Development

### Summary

Terms such as sustainability, green and low carbon footprint continue to dominate textile products and processes. So significant is this movement that influential retail chains such as TESCO, IKEA and Patagonia are disclosing the size of their products' carbon footprints on labels and hang tags. Even in the current recessionary times, consumers want to know where and how the products are made. Responding to today's eco challenges with sustainable solutions is driving new product ideas and innovations. Recently, the Australian Wool Innovation (AWI) has launched the Wool Carbon Alliance (WCA) to promote the environmental advantages of wool, and the position of wool in relation to other fibers continues to strengthen due to continuing innovations in wool products as well as strong market influence for green sustainable products.

This demand is particularly strong for specialized sportswear, active wear and defense-related products. Because of this wool innovation, domestic mills have found a new demand for their products. Current product developments focus heavily on

sustainability issues and in developing U.S. military programs.

### Achievements

The major developments for the FY2008/2009 have been in commercializing washable wool technologies, developing

**Wool Trust Goal Addressed by This Project:**

Development and promotion of the wool market

**Project Goals**

- ✓ *Work with U.S. mills and other appropriate U.S. Companies to develop new processes that position the U.S. wool industry as an ecologically responsive industry*
- ✓ *Develop new products that would overcome known deficiencies of the fiber, thereby creating a more modern image for wool*
- ✓ *Explore opportunities for wool products developed for the military in civilian markets*

antimicrobial treatments for wool and improving basic properties of wool fiber through chemistry and through fiber blends.

The success achieved in the programs described is due to careful selection of industry partners to address some of the crucial points of the wool industry throughout the production and marketing chain.

## **Project Description/Results**

All projects described here were carried out in conjunction with a commercial partner, and all projects that had the military as their target were carried out jointly with another Wool Trust program: Market Research/New Uses. Adherence to this principle allows not only rapid industrialization of new products but also saves much of the development costs.

- *Machine Washable Wool Products*

Machine washable wool received new impetus from users and manufacturers anticipating the acquisition of a continuous wool top treatment line, superwash, scheduled to begin use in 2011. Prefabrication of some of the military and wool-blend products have been planned for production as soon as superwashed wool is produced domestically.

In addition eco-friendly enzyme technology for machine washable wool and other commercial options using non-chlorine treatments are still being explored.

Today, both the enzyme process and the new oxidative Devan PPT process are now commercial in the United States. The enzyme process is used by one spinner for military wool socks, treating some 3,000 pounds of wool yarns for the U.S. Marine Corps, whereas the Devan process is used by one fabricator for a civilian customer with over 30,000 yards of all-wool fabric produced in three different single-and double-jersey constructions. The new product lines were launched for the current fall season using domestic superfine wools.

- *Antimicrobial Treatment on Wool and Wool-Blended Products*

Wool is naturally antimicrobial. Unfortunately, it does not meet the American Association of Textile Chemicals and Colorists (AATCC) 100 or the American Society for Testing and Materials (ASTM) 2149 test protocols for antimicrobial certifications. Antimicrobial properties are becoming increasingly important for combat military clothing as the garments tend to be worn continuously over a number of days in a combat situation.

This high priority program continues to be investigated with all major U.S. antimicrobial chemical suppliers. Trials for the antimicrobial-treated wool has shown promise on wool/Fire Resistant rayon blended fabric meeting AATCC 100 test protocol and this blend is supplied by one of the two fabric suppliers for the Fire Resistant Environmental Ensemble program. Work continues with all major suppliers assisting them with wool chemistry and process applications appropriate for wool and on all wool fabric where current chemistry has not passed AATCC 100 required protocol.

Much information is generated and offers confidence in meeting the military requirements. The industry partners have agreed to further trials at their facilities, and the treated fabrics will be duly evaluated using microbes as specified in the test protocols. In addition to all wool fabric

trials, trials are also planned using wool-blended fabrics. The latest wool-blended fabric is currently on order by the military on the understanding that the blended product will meet the antimicrobial requirement.

- Washable Wool Sweater

The fabric and garment specifications have now been written and once approved, will allow purchase of the item by the military. All partners in the manufacturing pipeline have initiated spinning and knitting to meet an early response to the expected order.

- Wool/Primaloft® Sweater

This wool product, one of the many that has been researched, most recently saw a 3,000-unit order from the U.S. Coast Guard.

- Wool/Nomex® Blended Fabrics

DuPont has agreed to participate with ASI and U.S. Army Natick Soldier Systems in the development of a long staple spinning system yarn with a view to overcome some of the observed deficiencies.

- Liquid Protein from wool

Recent trials in developing and extracting Keratin and protein segments have been analyzed and the research results published in three technical journals. The original work is now extended using wools from different sheep breeds to see if coarser wool varieties could offer desirable Keratin segments (a high concentration of disulfide bonds in the fiber is desired). Successful extraction will be used to redeposit the polymer after attaching variety of molecules to impart new and more desirable properties to wool.

## **Recommendations**

There is overwhelming evidence that the consumer of today wants a product that lasts longer, causes less harm to the environment and is ethically and sustainably produced. They are willing to pay more for such assured values.

Today's wool has extraordinarily diverse attributes – extra warmth, extra comfort, extra protection and extra style. It is worth that extra bit more.



## Market Research and New Uses

### Summary

ASI's Market Research and New Uses Program experienced significant accomplishments in FY 2009/2010. For the first time in over 50 years, wool returned to Army field gear through inclusion in the Fire Resistant Environmental Ensemble (FREE). The Army and manufacturers alike sought ASI's expertise in all areas of wool processing during the Research and Development and Low Rate Initial Production phases of this billion-dollar contract. When a potential fabric shrinkage issue threatened to disqualify the wool-blend fabrics developed for this program, it was ASI expertise that found solutions (short-term and long-term) to keep the program on track. FREE is now being delivered on time and on budget to U.S. soldiers all over the world.

ASI's collaboration with the Sheep Venture Company (SVC) resulted in two monumental successes for the U.S. wool industry and ASI. As mentioned in the previous paragraph, wool shrinkage, while an inherent characteristic of wool, is a significant challenge to wool's use in myriad applications. While globally technology exists that treats wool to reduce or eliminate shrinkage, making it washable, none of the required equipment was available in the United States. This lack of equipment and

the resulting lack of domestic manufacturing capability was a significant hindrance to U.S. wool competitiveness in both the military and commercial markets.

In particular, the Berry Amendment that requires all textiles procured by the U.S.

### Wool Trust Goal Addressed by This Project:

Development and promotion of the wool market

### Project Goals

- ✓ *Gather and maintain information relative to government/military use of wool*
- ✓ *Stabilize government/military use of wool products at current per capita levels*
- ✓ *Develop new customers within the DOD and other government agencies, to expand the overall use of wool by the U.S. government*
- ✓ *Research and develop new wool products to meet specific needs of government/military agencies and identify civilian marketing opportunities for these products*

Department of Defense (DOD) to be 100-percent domestic from the fiber forward, including all manufacturing processes, meant that chlorine/Hercosett shrink-treated wool could not be used for ANY applications within the DOD. In demonstration of ASI's commitment to U.S. wool, the association worked closely with the Sheep Venture Company (SVC) in the purchase and installation of a wool shrink treatment production line at the Chargeurs Wool USA Inc., top-making mill in Jamestown, S.C. The Chargeurs mill is the only wool top-making mill in the United States and also avails the process to many different companies and products, thus being the logical place for this equipment. The introduction of this technology into the United States has been met with significant enthusiasm throughout the wool industry. The new line is expected to begin delivering shrink-treated wool to customers in January 2011.

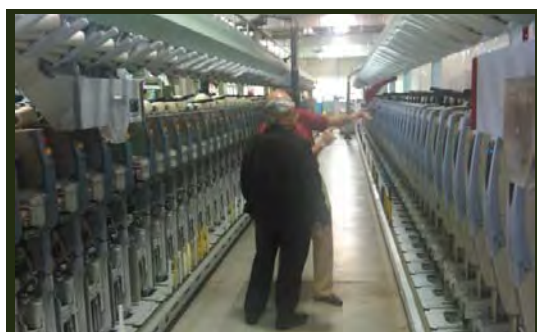
The second success in ASI's collaboration with SVC is directly related to the new manufacturing capability.

The U.S. military, in particular the U.S. Army, has seen the value of wool and of ASI and SVC's efforts related to wool shrink treatment. As a result, in 2009 SVC applied for an Army, DOD Small Business Innovative Research (SBIR) grant. SBIR awards research and development funds to small businesses to encourage new technology innovations that can be made available to support military needs as well as commercial needs.

The SBIR program consists of two phases. SVC's Phase I proposal 'Washable Wool Products for Individual Protection' was selected for funding in December 2009 with work beginning in January 2010. The six-month Phase I project was completed in July 2010. During Phase I, many shrink treatment methods were researched and their evaluation validated the selection of the chlorine/Hercosett process later installed at Chargeurs. Additionally, data was generated relative to the performance of shrink-treated wools that will be very useful in the future.

The Phase I results were readily accepted by the Army, and SVC was invited to submit a Phase II proposal to carry the project forward. The proposal was submitted in August 2010. The competitive selection process was completed in mid- October with the proposal receiving the highest score of all proposals considered by the U.S. Army Natick Soldier Research, Development and Engineering Center (NSRDEC). As a result, the proposal is also the number one priority for immediate funding by the Army.

The Phase II project is scheduled for two years. During the project, new, innovative garments using



Top: Compact spinning used in the SBIR project.

Center: ASI, SVC and U.S. Army representatives visit KentWool to support the SBIR project.

Bottom: Shrink treatment line installation in progress.



washable wool from the chlorine/Hercosett process will be developed and tested for Army use. The new garments will be developed for the Army's Extended Cold Weather Clothing System (ECWCS). It is anticipated that this project will lead to a significant increase in the use of wool by the U.S. military. The Army is committed to bringing wool to the U.S. soldier, supporting ASI and SVC's efforts throughout the SBIR process. Phase II is expected to begin in January 2011. ASI has supported SVC's work in the SBIR project wherever possible, ensuring its success.

## **Project Description/Results**

- *Information Gathering and Maintenance*

Continuous communication is required to gather and maintain information about U.S. military use of domestic wool. ASI's successful program provides the basis for most of its other successes within the military. Industry and government meetings, interaction with multiple trade organizations, attendance of trade shows, site visits and online research all play important roles in the gathering relevant information. In 2009, ASI continued to make use of the following opportunities for information gathering:

- **Outdoor Retailers Summer and Winter Markets:**

The Summer and Winter Markets of the Outdoor Retailers (OR) Association continue to provide ASI with some of the best opportunities to meet potential new users of American wool and discuss the latest product developments with established users. At each market, ASI representatives conduct over 20 individual meetings with industry leaders as well as all of the military services. The 2010 meetings included companies such as SmartWool®, Icebreaker, New Balance, Patagonia®, Wigwam Mills Inc., Albany International Corp., United Knitting, Goodhew LLC, KentWool, Burlington Industries, Woolrich®, Texollini Inc., and many others. ASI's meetings at the OR markets in 2010 resulted in collaboration between New Balance and Texollini that will result in a totally new wool knit fabric that will be introduced at the 2011 Winter Market. Wool has enjoyed a significant resurgence in performance wear favored by the outdoor market. ASI's consistent participation in these trade shows ensures positive visibility for American wool.

- **Visits to Individual Services:**

In 2010, ASI visited U.S. Navy, U.S. Coast Guard and Army research and development offices. The U.S. Air Force was not visited in 2010 due to scheduling conflicts and reorganization of the Air Force's research and development organization. Face-to-face site visits are still one of the best methods of obtaining and sharing information with the services. 2010 site visits provided beneficial information that was used to prepare for the Coast Guard fielding of a new mock turtleneck sweater developed by ASI. Army meetings provided critical information regarding production scheduling and fielding of the wool-based garments being used in the FREE. In 2011, ASI representatives are planning for site visits to all of the services.

- **Advanced Planning Briefing to Industry (APBI).**

APBI provides ASI with the most current information on all clothing and textile projects in progress or being considered by the DOD. Attended by 1,000 defense contractor representatives and DOD procurement officials, APBI gives ASI a good view of future

military needs. It also provides opportunities to discuss with both contractors and procurement officials the use of U.S. wool to meet their future needs.

- Stabilize Use

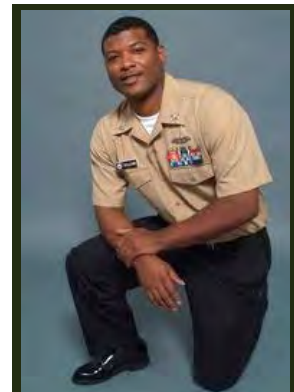
Contracting actions in 2010 declined somewhat when compared to the previous two years. The decline was caused by dress clothing and textile supplies reaching full capacity levels for the first time in several years. It is expected that contracting actions will decline for these items again in 2011 and 2012. The supply levels are directly affected by troop realignments and contract management within DOD. In spite of declines, 2010 was still impressive in terms of the amount of wool fabrics and garments delivered to the military. Some examples follow:

Navy Peacoat: Two major contracts were awarded to Sterlingwear of Boston in 2010 for production of the classic Navy Peacoat for the next four years. During FY 2010, Sterling produced over 24,000 of these coats, valued at \$2.9 million, consuming 85,000 pounds of American Wool.

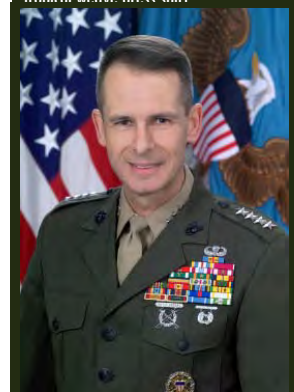


Dress Uniforms: The Defense Supply Center Philadelphia (DSCP) now renamed Defense Logistics Agency Troop Support (DLA Troop Support), contracts for most of the fabrics used in military dress uniforms. The fabric is then transferred to dress uniform fabricators to be made into uniforms. The fabrics can be readily identified by the weave pattern used in each.

- Tropical weaves are used in shirting materials and a limited number of uniform trousers and coats. The weights of these fabrics vary from 5 ounces to 10.5 ounces per linear yard and contain from 20 percent to 45 percent domestic wool. In 2010, DLA Troop Support ordered 484,500 yards of these fabrics, requiring approximately 300,000 pounds of American wool.
- Gabardine fabrics are used in dress uniform trousers and coats. The U.S. Marine Corps uses more of this type of fabric than any of the other services. Gabardine is heavier and more durable than tropical weaves typically weighing from 9 ounces to 12 ounces per linear yard and containing from 45 percent to 100 percent domestic wool. 186,253 yards of gabardine fabric was ordered by DLA Troop Support and required approximately 65,000 pounds of American wool.

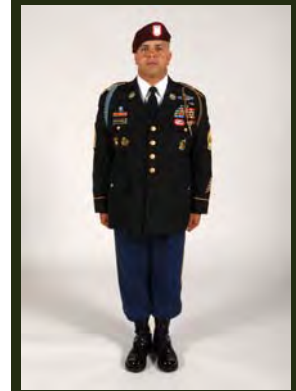


U.S. Navy serviceman wearing a tropical weave dress shirt



U.S. Marine Corps General Peter Pace wearing a gabardine uniform and wool dress shirt.

- As with gabardines, serge weave fabrics are used in dress uniform trousers and coats. The serge weaves resist wrinkling slightly better than gabardine with a more open twill pattern than gabardine. Serge fabrics are used predominately by the Army and Air Force. In 2010, the Army continued to require large quantities of this fabric as it introduces its new dress uniform. The serge fabrics are all blends of wool and polyester containing 45 percent wool and weighing from 9 ounces to 12 ounces per linear yard. DLA Troop Support required 898,500 linear yards of serge fabrics that consumed over 300,000 pounds of American wool.



U.S. Army 'new' blue uniform made from wool and polyester serge fabrics.

- Elastique weave fabrics are the heavy-duty wool fabrics used by the military. The Army and Air Force military academies prefer elastique for cadet uniforms because of its long wear and cold weather comfort. Additionally, elastique is used for unique dress uniforms such as those worn by the 'Old Guard' and other units performing ceremonial duties. Finally, elastique is used for the outer shell of dress overcoats. Elastique is typically 100 percent wool weighing from 16 ounces to 24 ounces per linear yard. In 2010, more of this fabric was ordered than in the last several years with 123,966 linear yards being ordered, requiring approximately 100,000 pounds of clean wool.



U.S. Military Academy at West Point cadet uniform made from wool elastique fabric.

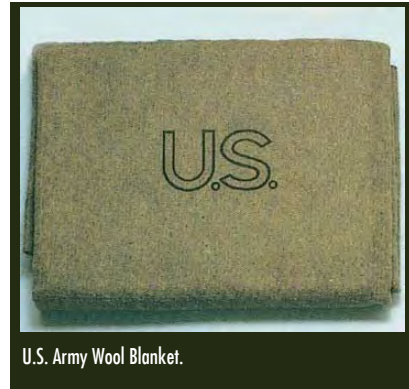
**Military Beret:** The Army and Air Force continued to order large quantities of the beret in 2010. Northwest Woolen Mills and Jensen Apparel produced over 175,000 berets using approximately 34,000 pounds of American wool.



Top: Standard U.S. Army Beret.

Bottom: U.S. Air Force Combat Beret.

Wool Blanket: As with other wool categories, the military bought fewer wool blankets in 2010 than in years past. The decline in purchases is due in part to the return of blankets used in Iraq into the domestic inventory. ASI will study improvements to the wool blanket when the shrink treatment line begins production. In 2010, DLA Troop support bought 28,000 wool blankets using over 85,000 pounds of clean wool.



- Develop New Customers

The introduction of a wool shrink treatment production line in the United States will significantly enhance ASI's ability to develop new customers for U.S. wool. At present, a well-known wool performance wear manufacturer is working closely with ASI and American wool manufacturers to bring its production back to the United States along with introducing domestic wool to their product line. ASI will aggressively pursue these new opportunities for American wool as they occur.

- New Uses

- **U.S. Army**

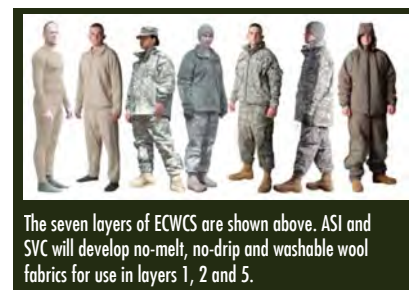
Fire Resistant (FR) Wool/Nomex® Fabric

ASI has begun contract negotiations with the NSRDEC to develop a new FR fabric family made from 50 percent wool and 50 percent Nomex® intimately blended and shrink resist treated. The new fabrics will feature long staple Nomex® and wool that will allow for spinning the blend on traditional long staple wool (worsted) spinning equipment. ASI will partner with DuPont (producer of Nomex®), Hanora Spinning Inc., Alamac American Knits LLC., Springfield LLC., and Duro Industries Inc., to develop the new fabrics. Work is scheduled to begin in January 2011 and be completed in mid-2012.



Extended Cold Weather Clothing System

ASI will work with the Sheep Venture Company during its SBIR project discussed earlier. The SBIR contract will require the production and testing of prototypes supporting the ECWCS.



- **U.S. Coast Guard**

*Coast Guard Mock Turtle Neck:* ASI developed a new blend of fibers for the Coast Guard's mock turtleneck. Combining wool with the superinsulator Primaloft®, a first for garment use, produced a fabric that is lightweight and performs exceptionally well in damp, cold conditions.

The Coast Guard has adopted this item. Initial procurement has been completed. Full-scale procurement will begin in 2011. The Coast Guard intends to buy up to 45,000 of these garments.



## **Recommendations**

ASI should maintain its close ties with the U.S. military. The relationship is paying great dividends for all U.S. wool producers.



**Summary**

ASI partnered with USDA’s Foreign Agricultural Service, U.S. wool growers and warehouses to seek out new export opportunities for U.S. wool. In doing so, it continued to leverage Wool Trust dollars with funds from other USDA programs – the Market Access Program, the Foreign Market Development Program and the Quality Samples Program. The U.S. industry also heavily contributed resources to this program.

The International Marketing Program enables ASI to take wool-quality improvements and translate them into new sales for the U.S. wool industry.

FY 2009/2010 was notable because: 1) wool prices increased significantly, the Australian EMI moving from around 770 usc/kg in August, 2010, to the highest ever recorded U.S. price of 1,036 usc/kg in early November. This occurred despite the weakness of the U.S. dollar, which reached parity with the Australian dollar by early November; 2) while China remained the dominant buyer worldwide, renewed interest by Europe and India is credited with being a

major factor in the renewed strength in the market; and 3) the U.S. wool market continued to also benefit from a strong domestic demand.

ASI has maintained diversity of markets as a fundamental strategy for its programs with continued strong investment of resources in the domestic market (military and non-military) and the international market.

With improved international market conditions, total U.S. wool exports increased by 37.8 percent by volume to 8.97 million lbs. clean and 34.7 percent by value to \$20.9 million. 89 percent of all exports were in the greasy wool form.

**Wool Trust Goal Addressed by This Project:**

Development and promotion of the wool market

**Project Goals**

- ✓ *Provide option for U.S. wool growers to market U.S. wool overseas*
- ✓ *Identify new and maintain primary markets*

China continued to dominate, taking 57.9 percent of all U.S. exports (5.6 million lbs. clean). India was second with 23.2 percent (2 million lbs. clean).

ASI programs have continued to be very successful in achieving significant interest and purchases from major wool-processing countries around the world despite the economic downturn over the last two years.

The wool textile-manufacturing industry in India is expanding, and this is seen by ASI as one of the important markets to balance the continued rapid growth of the Chinese market. While India has seen some slowing of export orders, its domestic textile demand has remained quite robust. A key focus of ASI's activities in FY 2009/2010 was to continue the FY 2008/2009 gains made in the market access and knowledge of U.S. suppliers in regard to India's market. This was achieved with India increasing its import volume of U.S. wool in 2009/2010 to 943 metric tons (MT) (2 million lbs.) and increasing its share of U.S. exports to 23.2 percent of total exports. India is now the number two export destination for U.S. wool. It remains clear that there was still a strong need to continue to improve the Indian buyers' understanding of U.S. wool and how they can best utilize it, as well as improve communications with U.S. suppliers. An ASI representative in India has enabled ASI to increase the effort to improve the penetration of U.S. wool into the Indian market, as well as raise the image and profile of U.S. wool. Following in the successful 100-percent U.S. wool knitwear project of 2005/2006, ASI implemented a trial project to have 100-percent U.S. wool shawls manufactured – a market segment that U.S. wool has not been in previously. As approximately 80 percent of shawls for the domestic market are medium to dark shades, this market segment is a good target market for U.S. wool. This project was completed successfully in the second half of 2008, and the sample shawls now available will be used to show other Indian shawl manufacturers the potential for U.S. wool usage in their manufacturing. ASI will continue working to ensure the commercialization of utilizing U.S. wool in the shawls market segment in India.

Overall, FY 2009/2010 sales to target markets as reported by USDA and Trade Stats Northwest were 4,056.3 MT (8,970,000 lbs.) clean wool (up 37.8 percent from last fiscal year), valued at more than \$20,000,000 million (up 34.7 percent from last fiscal year). The main reason for the lower percentage increase in the value figure despite the improved market prices overall, is a higher proportion of the better style wools (also higher priced) were utilized by the domestic industry, meaning that exports contained a higher proportion of lower-priced wools.

This is after the removal from the export statistics of wool-top exports to Mexico of fine, very-high unit value wools of 811 MT (1.8 million lbs.) with a value of \$10.4 million (i.e., Australian wool, combed in the United States and re-exported to Mexico).

Greasy wool accounted for 89 percent of the total export. Semi-processed wool exports (wool top, scoured) totaled 447 MT (985,000 lbs.) – a 109-percent increase over last year's level of 213 MT (470,000 lbs.). Assuming U.S. wool production in 2010 remained level with 2009 at 30.9 million lbs. greasy (15.45 million lbs. clean), total wool exports accounted for 57.9 percent of U.S. wool production.

China remained by far the largest market for U.S. wools, taking approximately 2,542 MT clean (5.6 million lbs., \$12.9 million). By volume, this is a 34.6-percent increase compared with FY 2008/2009. This represents 62.7 percent of all U.S. wool exports by volume and 61.7 percent by value. Greasy wool accounts for 99 percent of the sales volume to China.

India was the second largest destination with 943 MT (2.0 million lbs., \$5.6 million). This represented a 30.1-percent increase by volume over FY 2008/2009 and indicates that ASI's programs in India are having a positive effect. India is expected to continue its wool textile-industry expansion and, consequently, its use of raw wool.

The statistics show 210 MT (565,000 lbs.) of U.S. scoured wool being shipped to Malaysia (June-Sept). This may be a wrong classification as the value is extremely low (\$1.57/lb. clean) indicating a low end product – which would not seem to fit with the one combing/spinning plant that is in Malaysia. Malaysia is not currently part of ASI export programs.

Western Europe has all but disappeared from the export markets for U.S. wool with only a total of approximately 66 MT clean (145,000 lbs.) being shipped there in 2009/10. However, there are some signs of renewed interest in wool in Europe, and it remains to be seen what products might become of interest to any resurging wool textile industry in Europe.

ASI programs in Eastern Europe have been a disappointment this year (none), largely due to the closing of a major (relatively new) combing plant in Bulgaria in 2007/2008, in part as a result of the dominant position of China and the inability of many other countries to match China's price levels. ASI is reducing its commitment into this region but still maintains a program there as potential remains for an improvement in sales volume in the future. A concerted effort to attract U.S. wool purchasing by the major remaining combing mill in all of Europe (in the Czech Republic) will be made in 2011, in part to reduce the dependence of U.S. wool exports on China and in line with ASI's market diversification strategy. The main concern of this mill is the contamination in the U.S. wool clip it experienced with previous purchases, particularly polypropylene.

After a period of weaker international markets for wool, FY 2009/2010 has seen an improvement in demand. ASI's aggressive marketing program and the excellent participation by U.S. wool suppliers and warehouses helped minimize the remnant impact of the 2008 financial crisis on the U.S. wool industry, and, as a result, the industry has been in a position to rebound now that there is improvement in international market conditions.

## Project Description/Results

Marketing programs for wool were carried out in Western Europe, Eastern Europe, China, India, South America, Mexico and Canada. The strategy was one of niche marketing. Due to the fact that the United States has limited volumes available, the program sought to find buyers for specific wool types and match U.S. supplies precisely to buyer needs. Tactics were as follows:

- U.S. suppliers' missions to target markets during the off season (September – March) to familiarize U.S. companies with market opportunities and requirements.
- International buyer missions (reverse trade missions) to major U.S. wool centers during the in season (March – June) to



Members of a Chinese delegation evaluate wool on an international buyer mission visit to Lempriere USA Inc.



enable potential customers to see U.S. wool potential for themselves and make actual purchases.

- Assistance with technical processing trials (via processing trials and the Quality Samples Program), coupled with ongoing contact and trade missions. Technical assistance focused on showing target companies optimum blending procedures to get the desired product. Because U.S. wool has unique characteristics and values, it is often used to blend with different types of wools or fibers from other sources in creating tops, yarns, etc.
- In key expanding markets (China and India), ASI has established an “on-ground” presence with a representative to assist U.S. exporters and international buyers to expand U.S. wool purchases. ASI has had a representative in China and in India.

The overall objective was to expand U.S. wool and wool-product exports via diversification. This included:

- Diversification of markets – i.e., the identification of new markets not currently importing significant amounts of U.S. wool products. This would enable the United States to seek out the best buyers and best prices for its products.
- Diversification of customers – historically, the bulk of U.S. wool exports have gone to a handful of customers. The goal was to locate new buyers in existing and new markets to spread out sales and reduce U.S. vulnerability to downturns.
- Diversification of U.S. wool types – i.e., find buyers for types of U.S. wool that do not have a good buyer base or have lost their domestic sales base, thus enabling the U.S. industry to export a broader selection of its wool clip.

Given that the United States is a small-volume producer, compared to competitors such as Australia and New Zealand that produce large amounts of wool, the goal has been to add one or two new customers or products a year for each target market. This is more than sufficient to counteract declines in domestic customers and to create competition for U.S. wool.

Other results include:

- The United States continues to retain one-half of the approximately 30 customers cultivated in the past seven years as regular customers. Many were convinced to try additional wool types and to buy incremental volumes this past fiscal year.
- After a period of weaker international markets for wool, FY 2009/2010 has seen an improvement in demand. The new customers and new sales developed by ASI’s program provided strong support to U.S. exports during the year. U.S. wool exports from October 2009 to September 2010 were 4,056 MT clean (8.97 million lbs.), a 37.8-percent increase over the previous year (statistic source: USDA).
- This ASI program is successfully achieving its objective of redistributing the U.S. wool sales base. There is now a diverse customer base from various countries. For instance:
  - China, now the largest customer for U.S. wool, increased its purchases of U.S. wool from 1,889 MT (4.1 million lbs.) last fiscal year to 2,542 MT (5.6 million lbs.) this year. Greasy wool purchases continued to dominate, and 99 percent of all exports to China were in this form. This is expected to continue. Last year, three new buyers from China purchased U.S. wool for the first time.

- As part of the wool type diversification strategy, ASI continued a short wool program for China to promote China's use of woolen system wools. This has been a factor in the increase in the exports of short wool types to China. A program for scoured wool will be added in 2011.
- ASI placed a Chinese language advertisement in a major Chinese wool textile magazine, *Wool Exporter*, to support the international advertising campaign to increase the awareness of U.S. wool.
- India representation has improved ASI contact and service in India and permitted a new market segment trial (shawls) to be completed in 2008. Work continues on the shawls project to commercialize the gains made by doing the trial. Additionally, some combing trials are planned in 2011 to broaden the client base in India.



- In another key achievement, it should be noted that support from the U.S. industry continues to develop the ASI international programs. This constitutes the program's major strength. Currently, the number of U.S. companies exporting wool is three times what it was in years prior. The U.S. industry's export expertise has been significantly improved.
- As a result of the expanded options and their own improved expertise, U.S. exporters have been able to locate and take advantage of the best market prices available, as opposed to having to accept the best price from a limited range of market options.
- The increased competition for U.S. wool, greater marketing power and improved quality of U.S. wool were all factors in allowing the U.S. wool industry to be in a strong position to take advantage of an improvement in international market conditions that occurred in 2010.

## Recommendations

This program is an important part of the overall Wool Trust activities in that it is the final test that indicates whether U.S. wool competitiveness has been improved. The ability to find new customers throughout the globe for U.S. wool – to replace the lost domestic mill customers – hinges on the effectiveness of various other programs to create a U.S. wool clip that is marketable to overseas customers. New Quality Improvement programs and adoption of an internationally accepted wool description system are critical steps in this process. At the same time, it is very important to create a higher profile for U.S. wool internationally, which is what this program achieves, to broadcast U.S. wool's marketability. The guiding principle should continue to be diversification of markets and customers to create a full range of sales options for U.S. growers. Besides consolidating gains in existing markets, ASI should continue to seek out opportunities in new markets as the change in the location of wool-manufacturing entities occurs globally. This adaptability to market changes is crucial for the survival of the U.S. raw wool industry as textile production is one of the industries most affected by the fundamental realignment of international trade in 2005.

## **Appendices**

ASI's Unified Export Strategy, October 2009 – September 2010

ASI's Country Progress Report, October 2009 – September 2010

(on file after 3/31/11)

Report on U.S. Marketing Year Exports by Northwest Statistics

Representative Trip Reports

Evaluative Surveys by Reverse Trade Mission Participants

American Wool Council Ad



## New Technology and Market Accessibility

### Summary

These programs have been at the core of the Wool Quality Improvement Program. It aims to put to use, for the U.S. industry, global technological advances in wool production, automation and wool-fiber testing. New Technology is also used to increase market accessibility to both the domestic and international wool markets.

Over the past year, this program made progress in improving U.S. packaging via usage of wool presses, U.S. sampling via a new grab sampling program and marketing via the pooling of wool pools. Competing supplier countries are increasingly investing in and using these technologies. To participate in the international marketplace, the United States needs to ensure that its wool industry has access to comparable technology.

The United States has already reaped benefits in terms of being able to show buyers that it is able to produce wools comparable to those of other countries and will reap even more long-term benefits as it is able to incorporate testing information into genetic programs to improve U.S. flocks.

### Project Description/Results

Over the past seven years, ASI has researched and invested in a variety of technologies for classing, objective measuring, describing and transporting wool. The most significant investments were that of the Optical Fiber Diameter Analysis 2000 (OFDA2000) equipment, staple length meters, a staple breaker, Near Infrared Spectrometry (NIRS) equipment, grab sampling equipment and making available wool presses for wool pools and warehouses.

#### Wool Trust Goal Addressed by This Project:

Improve the quality of wool produced in the United States, including wool production methods

#### Project Goals

- ✓ *Increase the use and adoption of new wool technology in wool fiber testing and marketing of wool, resulting in a higher quality wool clip and to be able to certify the advantages of U.S. wool to buyers*

Now, this program's focus is shifting more toward education to improve utilization of these technologies. Learning to use and apply the information obtained from these technologies has been an ongoing process.

Additionally, ASI will seek out new technology and equipment to address unmet needs.

Following are some of the activities and achievements of the past year's New Technology Program:

- *Optical Fiber Diameter Analysis (OFDA2000)*

ASI owns and leases five OFDA2000 machines to four universities and one wool cooperative to conduct research and outreach programs in the United States. The OFDA2000 is a suitcase-sized, portable machine that can measure wool fiber diameter rapidly in the field, contributing to genetic and quality improvement.

Calibration wool-top slides have been used to ensure that the equipment is in calibration. All equipment is inspected annually to ensure proper function and calibration.

The number of sheep, and therefore pounds of wool, impacted by the use of the equipment continues to increase as growers now routinely test replacement stock only (about 20 percent of their flock), compared to previous years when entire flocks were tested.

Due to difficulties of scheduling shearing and having the equipment on location, many lease holders and growers have opted to test sheep wool samples previous to shearing at a convenient time for the grower and then sort the sheep into shearing/breeding groups for management and selection programs.

The National Sheep Improvement Program (NSIP) continues to work with growers and researchers on genetic selection programs. Advances have been made in both wool and lamb performance traits and in wool traits that were thought to be antagonistic, such as decreasing fiber diameter while simultaneously increasing grease fleece weight and staple length. This clearly demonstrates that producers can make selection progress in traits for both wool and lamb simultaneously. The OFDA2000 equipment continues to provide the means for more producers to have objective wool-measurement data for more rapid improvement in wool productivity.

In addition to genetic selection programs, several lease holders continue to utilize the OFDA2000 equipment for wool classing at shearing time. Two lease holders are now working with manufacturers on using the equipment to specifically meet strict quality control guidelines for specific high-end garments and uses. By combining the genetic selection program and classing at shearing, future growth and profit for both the grower and wool processor are being realized.

- *AgriTest Staple Length Meter and Staple Breaker Model 2*

Testing for wool staple length and strength continues to increase as more warehouses, buyers and wool brokers become familiar with the test results and how to utilize the information for evaluating U.S. wool. More clips are being tested as buyers are becoming

aware of the benefits of using the tests for predicting processing performance, resulting in a better value-based wool marketing system in the United States. Providing these additional measurement aids in marketing the U.S. wool clip as other countries routinely have this information available when marketing wool. Customers of U.S. wool are able to buy wool with additional confidence knowing the staple length and strength and more likely to pay more because the risk of estimating these important wool traits is eliminated by testing.

- Near Infrared Spectrometry (NIRS)

The ASI purchased and leases a FOSS NIRS to Yocom McColl Testing Laboratories for the development of more rapid and economical measures of yield, wool base and vegetable matter base. Yocom McColl is working with researchers from the University of Wyoming Wool Laboratory on the development of calibration equations. The process has been slow due to several unforeseen issues related to U.S. wool.

Progress for the adoption of NIRS technology for testing U.S. wool has been limited because currently, U.S. wool is considered more variable in preparation and, therefore, lacks uniformity necessary to develop calibration equations. Research continues, and as the database continues to increase, it is more likely that suitable calibration equations can be derived. Due to the large economic consequences for the entire industry, the NIRS technology cannot be utilized until satisfactory calibrations are developed.

- Wool Grab Sampling

Interest in equipment that can core and grab sample wool continues to increase as both domestic and international buyers become familiar with U.S. wool and gain knowledge on how to utilize this information. Many new customers of American wool now realize the United States does have the ability to provide additional measures, test results and a description system for non-measured characteristics similar to other countries.

The grab sampling equipment services two important needs/uses within the industry:

1. A sample used to measure wool staple length and strength.
2. A sample used for Australian Wool Exchange Limited Identification (AWEX-ID) and visual evaluation of wool.

Use of the equipment continues to expand as more warehouses are taking samples and expanding their use of testing for staple length/strength and use of AWEX-ID.

- Wool Description – AWEX-ID

Objective measurement testing and describing U.S. wool in terms familiar to the international trade are crucial for the U.S. industry to compete in the world market.

The use of AWEX-ID is slowly expanding in the United States and is now used by two warehouses. These warehouses reach growers in at least 12 different states. Through the use of AWEX-ID, new international wool customers are able to purchase wool from these warehouse and use AWEX-ID to be able to compare sale lots between other warehouses.

The current local terminology used by wool pools and warehouses not participating has been a challenge for new buyers. One buyer using AWEX-ID to become more familiar with

other wool in the United States has been able to increase his purchases because of a more-uniform description system.

Through the use of AWEX-ID and small representative samples of various lots of wool, at least two buyers were able to bid and purchase wool with confidence without having to be physically present at the sale.

Through the use of AWEX-ID, it is possible to track changes in wool preparation at the ranch/farm level. In 2009, the number of qualifiers has decreased compared to previous years, along with qualifiers having lower ratings – indicating that the ASI quality improvement programs targeting wool quality via the shearing crew is meeting its target.

Continued updates to changes in AWEX-ID are provided to AWEX-ID accredited appraisers.

## **Recommendations**

ASI's assessment is that the investment in new wool technology has been well worth it. Although the learning curve has been steep and is still present, the United States has reaped benefits in terms of being able to show buyers that it is able to produce quality wools. ASI needs to continue its efforts in this area. This includes ongoing education on the usage of the equipment purchased, coordinated genetic improvement programs and the exploration of other technologies and equipment, particularly equipment that can help the United States achieve better efficiencies in wool preparation.



## Raw Wool Quality Improvement

### Summary

Raw Wool Quality Improvement is the core wool program. As the United States improves the quality of the wool clip, it utilizes new technology to market wool. This program ensures that handling, classing, testing and marketing methods are improved. Thanks to the producer education conducted under this program, more producers are utilizing the techniques recommended by ASI.

The end result of these programs has been a more marketable wool clip. ASI has been enormously successful in finding and retaining new buyers in its International Market Development Program, and some of the credit goes toward the improved quality that international buyers were able to see in U.S. wool. Many new buyers had vaguely negative perceptions of U.S. wool, although those opinions were not based on any actual experience. ASI has been able to open new markets and expand sales by showing international buyers that the United States does produce quality wool.

### Project Description/Results

This program has successfully worked to develop awareness of the need for improvements in the U.S. wool industry and

to implement changes in testing, packaging and marketing. It identifies ways in which U.S. wool could be better presented to the buyer and assists the U.S. grower with information or equipment that could meet these needs. Over the past year, a variety of activities were conducted:

### Wool Trust Goal Addressed by This Project:

Improve the quality of wool produced in the United States, including wool production methods

### Project Goals

- ✓ *Enhance the market infrastructure for U.S. wool to facilitate domestic and international wool marketing opportunities*
- ✓ *Look for ways to increase efficiencies and make American wool more easily accessible*
- ✓ *Improve the quality of U.S. wool through coordinated educational efforts supporting market development*



- Wool Quality Improvement Programs

A revitalization of wool quality improvement programs was launched in 2005 through the Certified U.S. Wool Clip Program for shearers and wool producers.

In the past years, more growers and sheep shearers are becoming aware of the certified program and adopting the recommended practices and procedures.

Through warehouse and wool buyer input, contact was made with larger commercial shearing crews to encourage participation in the certified program. By direct contact and follow-up site visits, staff and crews were able to work together on ways to improve shearing efficiency and wool quality and increase the amount of wool being properly prepared by the shearing crews. Buyers reported better wool preparation by many of the crews, and Australian Wool Exchange Limited Identification (AWEX-ID) of sale lots contained fewer notations of preparation defects in FY 2009/2010 compared to previous years.

Wool Quality Program materials and education provided for six weeks during the shearing season by ASI personnel working one on one with shearers onsite where the wool was being harvested. All phases of classing, packaging, labeling and marketing was discussed with the crew managers during normal harvesting with the shearing crews in order to maintain the highest possible wool quality standards. OFDA technology was demonstrated during this process to further educate shearers on the wool value determining characteristics which could be measured with this technology. OFDA technology also demonstrated at general sheep meetings and sales to educate producers about the technology available to utilize in general ram quality improvement programs using genetic selection criteria within their herds.

The demographics of the U.S. sheep industry (2007 Census of Agriculture) indicates that 175 sheep operation have more than 2,500 ewes one year old and older and account for 27 percent of the U.S. wool production. Letters and materials were specifically designed and sent to these growers encouraging participation in the Certified Wool Clip Program.

Growers, shearers and industry supporters actively participating in the Certified Wool Clip Program were sent letters of appreciation, certificates and wool hats for participating in the program. More than 24 sheep producers, 64 sheep shearers and 24 industry supporters participated in the program in 2009/2010.

Wool packaging and labeling issues continue to be a concern for marketing of the U.S. wool clip. A new brochure on packaging and labeling of wool bales was

**ASI** | **U.S. CERTIFIED CHOICE WOOL CLIP** | **AMERICAN WOOL**  
 GROWER DECLARATION AND CHECK-LIST

Growers checking the items below and signing at the bottom of the page will self-certify that they are producing an above average clip by adopting the following rules. (Check all that apply.)

- When possible use a certified sheep shearer or shearing crew – provide name of certified shearing crew below.
- Make efforts to Minimize Wool Contamination including poly and colored fibers.
- Sort Sheep prior to shearing by wool type and package the wool and off-sorts separately.
- Prepare wool in the Bellies Out manner to reduce contamination in fleece line. Includes the removal of tags, leg wool, topknots and sweepings, and packaging this lower valued wool separately from fleece wool and belly wool.
- Keeping obvious differences separate, and not packaging them together such as:
  - Different Breed/Wool types (Wool, Meat, Carpet, Colored)
  - Different Wool Lines (Fleece, Belly, Tags)
  - Differences in Staple Length and Staple Strength (short & tender wool)
  - Other obvious differences when economically practical (lambs and yearling wool)
- Use only new and approved non-contaminating wool packaging materials.
- Will not allow wool to be contaminated by neglect or carelessness.
- Label wool packs and bags properly to identify:
  - Grower Name
  - Wool Description
  - Bag Number
- Maintain a written record of the wool clip produced by:
  - Shearing date
  - Individual bale or bag
  - Total production
  - Prices received for all wool.
- Notify Marketing Agency of Actions taken to produce a Certified Choice Clip and file necessary forms and documentation.

By signing this declaration you certify that you are striving to produce a better U.S. wool clip and abide by these ten guidelines above.

I \_\_\_\_\_ certify that the above are true statements. \_\_\_\_\_  
(Grower Signature) (Date)

\_\_\_\_\_  
(Print Name) (Grower Address)

\_\_\_\_\_  
(Grower Telephone, E-mail)

\_\_\_\_\_  
(Certified Shearing Crew Name, Address)

\_\_\_\_\_  
(Shearer Telephone, E-mail)

Grower Declaration for U.S. Choice Wool Clip Retain Top Copy for Your Files  
Bottom Copy to Marketing Agent 4009 - 02/08

developed and provided to shearers, warehouses and state sheep associations to distribute to members. As a result of discussions, shearing crews and growers are more aware of the problems for the industry post-farmgate caused by lightweight bales, overlength bales, improperly closed bales and non-uniform labeling.

Materials to help document and track wool from individual growers through the warehouse continue to be made available and are gaining popularity. The carbonless copy form was developed with a wool press record by individual bale on one side, and the back side containing a Wool Summary Record. This form was developed in response to warehouses wanting one simple form and record of the wool being sent in by the growers. Shearing crews appreciate the continuity and uniformity of the information across the United States.

- **Sheep Shearing Contest**

ASI sponsored additional prize money at the National Western Stock Show International Sheep Shearing Contest. Prize money was awarded to shearers from across the United States and Canada; \$1,500 in the junior, intermediate and professional divisions. Funding of \$250 was sent to Iowa, Illinois, Indiana, Kansas, Ohio, Michigan, Montana and South Dakota to help them offset costs associated with their regional shearing contests.

- **Sheep Shearer Database**

ASI continues to contact shearers and include them in the database. To date, more than 245 shearers or contractors are now either listed on the ASI website and/or receive ASI materials for wool quality. Contact with shearing crews to observe their practices in the field and suggestions on ways to better incorporate the certified program guidelines continues to improve the quality of wool being offered for sale in the United States. Because shearing crews or individual shearers contact many different growers, the impact on wool production is greater than individual grower contact.

- **Shearer Education**

Shearing Handbooks continue to be made available at cost for shearing schools across the United States. ASI maintains and publishes a listing of known shearing schools annually for those interested in shearing. More than 20 different schools were held last year.

Sheep shearer education continued with the establishment of an annual Wool Mill Tour to the processing and fabric making plants in the United States. This educational opportunity for shearers exposed 10 shearing crew managers, whose crews package and harvest hundreds of thousands of pounds of U.S. wool each year, to wool processing and ultimately the production of fabric, which was directly related to their processing standards and the Wool Quality Improvement Programs. Interaction of shearers and processors



increased the communication between these different segments so that an exchange of ideas and issues would assist both groups in maintaining high wool quality standards and reduce processing issues. Ultimately, this would result in a higher quality product, increased efficiency at both levels and higher-valued wool for producers.

- **Grower Education**

Educational programs are a direct response to grower interest in learning more about wool and the lack of educational opportunities locally available. Programs were conducted in Colorado along with a web-based program with the Pipestone Lamb and Wool Program. The OFDA2000 continues to be a valuable tool to demonstrate wool testing and the importance of objective measurement of wool with emphasis on how the textile industry uses this information for manufacturing of garments. Examples of different wool shirts/jackets were used during presentations, which covered worsted and woollen processing, influence of fiber diameter on fabric weight, cost of garments and marketing. This presentation helped explain to the students why some wool is more valuable than others with hands-on examples and current wool trends.

In addition, In order to help wool producers implement best management practices in order to get the highest quality wool clip possible, ASI also conducted a series of trials to evaluate which paints, used for branding for identification, colors and application techniques work best and leave the least residue in wool. Paint residue that does not scour out of wool limits what processors and fabric manufacturers can use the wool for in terms of end products. Some paint also can be sticky and cause significant damage to processing machinery, so it is imperative that producers are educated on the type of paint and application process that minimizes the effect of paint.

Also, the American Wool Council (AWC) developed the first edition of the *Fine and Medium Wool Producers Directory*. This directory was developed to better assist U.S. sheep producers and buyer of U.S. wool by listing information on available genetics for producing better quality wool. The directory contains contact information for producers, information on ram performance tests, wool objective measurement information and information on genetic selection for wool quality. It also provides information on various ram sales and U.S. wool warehouses to allow producers to buy animals to improve genetics and find a warehouse to fit their wool production.

- **FFA Convention**

The ASI/American Wool Council and the American Lamb Board booths at the National FFA convention were again well received. The Make it With Wool contest was invited to participate in the booth and promote the wool and sheep industry. In addition, garments made with 100-percent washable wool jersey fabric and wool/Nomex® were on display to showcase product development and programs the AWC is conducting. The sheep production handbook, new grazing handbook and other ASI materials were showcased as educational material available from ASI. Finally, the career opportunities for young people in the sheep industry as sheep shearers were promoted to those that attended the career show. More than 55,000 young people and high school FFA advisors attend the FFA career show annually.

## **Recommendations**

This program has successfully worked to develop awareness of the need for improvements in the U.S. industry and to implement changes in handling, classing and marketing. However, much more remains to be done, particularly in the area of marketing. Future programs need to continue to seek ways to reach the industry with the important message of efficiency through unity.

## **Appendices**

Wool Labeling Brochure

Wool Micron Card

National Western Stock Show Shearing Contest Results



**Summary**

In its efforts to become more competitive, the U.S. wool industry faces many challenges. To overcome them, a clear understanding of both the U.S. and global situation is necessary. Effective programs require knowledge of U.S. strengths and weaknesses and global and domestic opportunities. Without this, the United States cannot become a player in the world market. Under this Market Information program, ASI carried out year-round analysis of crucial wool-market indicators, both for the United States and competing suppliers. Numerous industry data sets were maintained and expanded, with new databases added. Besides strategic planning, these databases were used to monitor the effectiveness of the Wool Trust programs.

**Project Description/Results**

ASI continued to collect and analyze data covering the sheep industry. This is a crucial function as USDA does not monitor the U.S. and world sheep industry as it once did, and less information is thus available to help the U.S. industry compete.

- ASI worked with USDA's Agricultural Marketing Service to improve the quality of market data

- ASI maintained and expanded wool databases on production, prices, etc., built in the first years of Wool Trust programming. The goal was to expand prior and current databases so that at least a minimum of 10 years of data would be available for analysis. In many cases, 25 to 30 years of data were made available.

**Wool Trust Goal Addressed by This Project:**

Improve the quality of wool produced in the United States, including wool production methods

**Project Goals**

- ✓ *Enhance the market infrastructure for U.S. wool to facilitate domestic and international wool marketing opportunities*
- ✓ *Look for ways to increase efficiencies and make American wool more easily accessible*
- ✓ *Improve the quality of U.S. wool through coordinated educational efforts supporting market development*

these federal agencies provide the sheep industry.

- ASI has also collaborated with the Livestock Marketing Information Center (LMIC) to enhance both ASI's and LMIC's databases, which has augmented our collective outreach and analytical programs.

For ASI, much of the above data was also valuable in strategic planning and evaluation:

1. The data assisted ASI in its strategic planning as to how Wool Trust funds could best benefit the industry. For instance, indicating that Quality Improvement programs should place their greatest emphasis on U.S. wool packaging and testing, as these are areas where U.S. wool is weakest. It also helped ASI to pinpoint those international markets where U.S. wool is likely to find a receptive customer base.
2. The data also aided in the implementation of actual programs, thus assisting in quality improvement and market development.
3. It improved producer information about the market situation for wool, helping them to maximize their competitiveness through more-informed market decisions.
4. It assisted ASI in evaluating progress made over the past year, including monitoring the continued closing of the price gap between U.S. and Australian/international prices and analyzing the growth of U.S. exports.

Information collected covered wool and lamb because profitability in lamb marketing is crucial to the continuation of wool production. Wool, lamb and pelts are the three items of profit that bring return to a producer. Growers must break even on their lamb or they will not produce wool at all. Because of this, the lamb market is intrinsically tied to the profitability of the U.S. wool grower. Also, the U.S. industry wants one source of information and analysis for multiple areas, which eliminates searching and ensures consistency of data.

## **Recommendations**

Knowledge is the first step toward effective action. Thus, this program forms a valuable base for ASI and the U.S. industry in improving its competitiveness. ASI needs to continue to update its industry data sets to ensure that the United States is well prepared to compete in the domestic and international arenas.



## Summary

Any quality improvement plan needs to include the management of the resources on which sheep are produced. Not only is wool fiber quality impacted by the land and water resources on which it is grown but also the industry's ability to maintain these resources properly impacts its long-term profitability. Resource issues cover nutrition, water availability, predation and similar topics. During the past year, ASI continued to provide services to help U.S. wool growers better manage the resources on which their wool production depends in the form of research and education on natural resource management.

## Project Description/Results

Under this program, ASI carried out a variety of activities:

- ASI continued to research and analyze sheep production methods related to forage, feed costs and sheep ecology issues. This includes monitoring the latest improvements in natural resource management and reporting back to the U.S. industry via producer meetings, producer publications and through producer volunteers. Feed resources

are nearly 50 percent of the cost of producing lamb and wool. Reducing these costs through more efficient utilization of vegetative resources improves wool profitability at the producer sector.

- The publication, sale and distribution of the handbook, *Targeted Grazing: a Natural Approach to Vegetation Management and Landscape Enhancement*, with accompanying copy of the handbook in CD form.

### Wool Trust Goal Addressed by This Project:

Improve the quality of wool produced in the United States, including wool production methods

#### Project Goals

- ✓ *Research land-use management techniques that will help sheep growers maximize their resources*
- ✓ *Educate wool growers on proper land-management techniques to better manage the resources upon which wool production is dependent*

- ASI was granted \$100,000 from U.S. Department of Agriculture's National Resource Conservation Service's Conservation Technical Assistance Program to execute its two-year project entitled, "Bio-control of Invasive Plants Using Sheep and Goats." The final report was submitted for this grant in the first quarter of 2010.

## **Recommendations**

Natural resource management is an ongoing concern for U.S. growers and needs to remain a part of the overall program. Increased profitability can be added to the industry by not only harvesting wool and lamb from the animal but also by using the animal to manage the natural resources on which wool production is dependent. Increased emphasis is being placed on the development and use of educational materials and outreach programs on the application of prescribed grazing.





**Summary**

The assurance of a quality product to buyers begins with the health of the animal that produces it. Without a healthy animal, all other wool-improvement programs would not make an impact. Unless the United States can assure buyers of its commitment to high quality, it will find its product at a disadvantage in the marketplace. A key factor in providing this assurance is to show potential buyers that uniform high standards and procedures for animal health are observed, implemented and enforced.

Managing risk is also a necessary component of producing high-quality wool and lamb. Sheep production and marketing is inherently full of risk. The animals are reared under extensive production systems that can include very harsh environmental (weather, topographical, etc.) conditions that expose them to hazards.

Sheep and other small ruminants are also near the bottom of the mammalian food chain, so they are almost always under threat or risk of predator attacks. Certain periods within the sheep biological production cycle present more risk than others. For example, nutritional and other stress can cause breaks in the wool fiber, interruptions in the estrus cycle and fetal loss in pregnant ewes.

Therefore, managing and minimizing production risk is a necessary and vital part of raising sheep and producing high-quality wool.

Marketing and price risk are also key issues that sheep producers must constantly try to manage. Because the pricing and marketing of sheep and sheep products occurs only once or twice a year for most producers, effective management of cash flow means that producers use borrowed operating capital on a regular basis. Unlike other livestock species, few, if any, financial marketing or price-risk management tools are available to sheep producers, to date.

Over the past four years, ASI has worked with other industry and academic partners to investigate develop and implement price-risk management tools.

**Wool Trust Goal Addressed by This Project:**

Improve the quality of wool produced in the United States, including wool production methods

**Project Goals**

- ✓ *Improving and ensuring the highest U.S. quality wool and improving U.S. wool competitiveness*

Thus, ASI carried out ongoing work during the year on sheep production, research and health with the goal of ensuring a healthy and marketable product for U.S. wool growers. This included active participation with USDA's Animal and Plant Health Inspection Service (APHIS) and other agencies in analyses, decisions and implementation of issues/programs impacting U.S. sheep health and management. Many of these are long-term projects that require a multi-year commitment. Examples of projects worked on during the past year include the implementation of a national sheep quality-assurance program for producers, including dissemination of the *Sheep Safety and Quality Assurance (SSQA)* manual and certification of additional trainers.

In addition, several hundred producers were trained on SSQA Level I, and a significant number have achieved SSQA Level II. ASI also worked closely with USDA and industry groups to design the new National Animal Traceability System and assisted in enhancing national Emergency Response Plans, aided USDA in its cooperation with the Department of Homeland Security (DHS), serving as a resource in implementing the USDA/APHIS/Veterinary Services (VS) "Safeguarding Animal Health" plan and worked with USDA to implement the accelerated National Scrapie Eradication Program (NSEP) with the goal of eradicating this disease from the United States in a few years.

### **Project Description/Results**

The importance of animal health, animal production and risk management in wool and lamb marketing cannot be overemphasized. The regulatory and export crisis in the U.S. beef industry due to the identification of cattle infected with bovine spongiform encephalopathy (BSE) as well as the impact of the H1N1 virus on the swine industry serve as examples of the significance of this issue. The health and care of the animal is the starting point for any strategic plan to make U.S. wool more marketable. Sheep nutrition, reproduction, genetics, handling facilities, behavior, predator management and good health care all work together to create a high-quality, uniform U.S. wool clip.

Likewise, the ability to manage some of the risk factors inherent to sheep and wool production and marketing is essential to keeping the production unit on solid financial ground so that production-quality issues can be addressed adequately and improved.

Following is a list of the major issues, initiatives and activities that ASI was able to implement during FY 2009/2010:

- Continued the implementation of the national SSQA program for producers. Several hundred producers have been trained and certified in SSQA Level I, and trainers are working with producers in several states on SSQA Level II processes.
- Participated in the Animal Traceability development. The purpose is to develop a plan through which all livestock will be uniformly identified and traceable for food-security purposes and for animal-health emergency management. ASI continues to work with USDA and industry partners to help build a functional animal identification system that will augment the scrapie identification program for sheep.
- Partnered with state and federal governments along with other commodity and allied groups in implementing the "Safeguarding Animal Health" plan for USDA's APHIS.

- Worked with APHIS on implementing the accelerated NSEP via meetings, monthly communications to producers and state animal health officials, informal advisory communications and provided leadership in making needed changes.
- ASI cooperated actively with APHIS to increase the number of slaughter surveillance samples submitted for diagnostic evaluation from small processing plants.
- ASI, through APHIS, provided funding to state sheep associations to implement educational programs on scrapie eradication.
- Worked with USDA's Agricultural Research Service (ARS) both at the national program staff level and at various research stations including the Animal Disease Research Unit, Meat Animal Research Station Center and the U.S. Sheep Experiment Station on appropriate sheep-research direction and funding levels.
- Worked with ARS and others including the Council on Agriculture, Science and Technology (CAST) to both review published literature and initiate new research on potential health and disease risks of association between domestic sheep and wild bighorn sheep. As an outcome of this work, CAST developed and published a report on domestic/wild sheep disease conflicts. The report has contributed toward additional work with ARS and other academic institutions on establishing research experiments in this area.
- Worked with the ASI Bighorn Sheep Task Force to bring researchers, state affiliates and veterinarians together to discuss new or improved approaches to land management and disease conflicts at the state and national level.
- Participated in the National Animal Health Emergency Management Steering Committee (now a committee under the U.S. Animal Health Association) - a group of federal and state government officials, as well as industry representatives who are coordinating a strategy to more effectively and efficiently deal with animal health emergencies.
- Worked with the Food and Drug Administration's Center for Veterinary Medicine (CVM) and other livestock, meat and feed industry groups on better compliance strategies with regulations to prevent BSE in the United States.
- Worked with CVM and USDA's Cooperative State Research, Education and Extension Service on seeking label approval of several new drugs and expiring labels for sheep.
- Assisted with the ongoing development and enhancement of USDA's Emergency Response Plans.
- Using the price-prediction model, developed with industry and academic partners, constructed a plan for rating a Livestock Risk Protection (LRP) insurance product and submitted a proposal to USDA's Risk Management Agency to conduct a pilot project using these products. This program (LRP-Lamb) was approved in September 2006 for a pilot project in 27 states and implemented in September 2007. Since the beginning of this program more than 1 million lambs have been insured.
- Provided recommendations to USDA/APHIS/VS on specific subject-matter chapters under consideration by the World Organization for Animal Health (OIE), particularly on scrapie and animal welfare.
- Worked with industry and academic representatives from Australia, New Zealand and the United States on the prioritization and implementation of sheep genomics research.
- Participated in several formal and informal coalitions and allied industry organizations relating to animal health. The formal ones include:

- American Veterinary Medical Association's Food Animal Medicine Consortium
- Animal Agriculture Coalition
- National Institute for Animal Agriculture
- United States Animal Health Association
- Council on Agriculture, Science and Technology
- Animal Agriculture Alliance
- Center for Genetic Resource Conservation

## Recommendations

Animal health, food and product safety and risk are ongoing concerns. Many issues addressed this past year, and in prior years, continue to exist. Even those issues for which USDA, DHS and the U.S. Department of Health and Human Services decisions have been made need ongoing work to assure proper implementation, industry understanding and program effectiveness. Also, as with any agricultural sector, new issues will emerge in the upcoming year. As a recent example, diagnostic laboratories' supplies of reagent used for testing sheep for the presence of *Brucella ovis* (*B. ovis*) has been depleted, and the situation threatens breeding sheep sales in up to 20 states. A new reagent has been produced, yet further enhancements are needed to assure consistent results across states.

ASI plans to implement a more thorough emergency management and communications plan whereby the U.S. sheep and wool industry can more effectively partner with federal, state and local responders should an industry emergency occur.

A bilingual video on sheep handling is needed to educate workers and managers at all levels of the supply chain on the importance of proper sheep handling to help assure high-quality lamb and wool as well as give proper attention to the care and welfare of the animals.

ASI expects the number of producers who will be certified SSQA Level I and SSQA Level II to increase. Also, producers are being trained in and encouraged to implement SSQA Level III. A new Web-based SSQA training program will be implemented which will make training much more convenient and cost effective for producers.

The NSEP will enter its ninth year with the majority of flocks having a national premise identification number, regulatory slaughter surveillance is being implemented, sheep are being sampled at a higher rate monthly and a new, scientifically sound, live-animal test was approved and a genetic-based approach to scrapie risk reduction implemented. ASI will actively participate in education and outreach programs designed to help producers reduce the risk of scrapie occurring in their operation through cooperative programs with APHIS and state animal health officials and state affiliates. Regulatory enhancements to the NSEP will be proposed in 2011, and ASI will submit formal comments and recommendations from a coalition of industry and allied industry stakeholders.

Additional research and the dissemination of findings will be needed to advise land and wildlife managers on domestic/wild sheep health and interactions. Resources have been recently awarded to a major U.S. university to sequence the sheep genome. The outcome of this effort has the potential of revolutionizing genetic selection as well as disease diagnostics, control and treatment. ASI will work with university and industry collaborators, both in the United States and abroad to affect the effective and efficient utilization of this research for the U.S. sheep industry.

Thus, product safety, animal health and welfare, risk management and quality assurance are keys to the overall package in coming years to improve U.S. wool quality and competitiveness.

## **Appendices**

Copy of article in ASI's *Sheep Industry News* on Scrapie Eradication plan (November 2009 issue)

Copy of LRP-Lamb article in ASI Weekly

RMA/FCIC: LRP Summary Business Report

Council for Agricultural Science and Technology (CAST): *Pasteurellosis Transmission Risks between Domestic and Wild Sheep*

State Association Scrapie Eradication Reports



## Summary

The Wool Outreach Program enlisted support at the state and county level to maximize Wool Trust funding and create greater participation in Wool Trust goals. State sheep organizations were encouraged to develop their own programs for improving U.S. wool quality and competitiveness. Funding was supplied to groups on the condition that the program addressed the three specific goals of the Wool Trust Fund. As a result, this year 44 state sheep organizations carried out programs that worked to meet one or more of the three goals. It should be noted that in the ninth year of this program, states have steadily expanded their wool activities creating a greater synergy for achieving Wool Trust goals.

## Project Description/Results

This outreach funds local wool projects, run by state sheep associations, to support the overall Wool Trust Program. A total of 45 associations were invited to participate in Round Ten of ASI's Wool Outreach Program, which began Oct. 1, 2009, and ended on Aug. 31, 2010.

A total of \$180,000 was allocated for this program. The amount each state received was based on its number of stock ewes 1

year old and older, according to numbers compiled by the U.S. Department of Agriculture's National Agricultural Statistics Service. The minimum amount awarded was \$1,000.00.

The funding had to be used to increase the awareness and marketability of American wool, either through consumer or industry activities or a combination of both.

Suggested activities included:

- procuring a wool speaker/specialist at state sheep association meetings (expenses could include meeting expenses, speakers' fees, travel and lodging costs);

### Wool Trust Goal Addressed by This Project:

Improve the quality of wool produced in the United States, including wool production methods

#### Project Goals

- ✓ *Enlist the aid of producer states and state programs in achieving the three goals determined by the Wool Trust Fund – i.e. development and promotion of the wool market, wool quality improvement and information dissemination*

- funding Make It With Wool (MIWW) activities;
- conducting wool seminars, wool pools, etc.;
- supporting a value-added program, such as the making of wool blankets or other wool specialty products; and
- other activities suggested by the states and approved by ASI.

## Synopsis of Activities

States had to complete and remit an application form, denoting how they would spend their Wool Outreach funding. Each state sheep association submitted an application for approval prior to receiving its check – 44 states in all participated in this round of funding. All states also submitted a final written report detailing their Wool Outreach Program activities and associated costs.

In addition, some states used their own funding to supplement that which was awarded to them by ASI for Wool Outreach. In all, the total amount of funding spent by states on Wool Outreach-related projects, including both ASI's and individual states' funds, was \$286,534.85.

Following is a list of some of the main activities conducted. These activities supplemented and supported ASI's overall efforts to disseminate wool quality information, improve U.S. wool quality and market U.S. wool.

### **Alabama Meat Goat and Sheep Producers - \$1000.00**

Total costs of Wool Outreach-related projects: \$1,000.00

- Expanded upon the sock promotion from last year by purchasing an additional 400 pairs of wool socks manufactured in Alabama with special ASI/Alabama Meat Goat and Sheep Producers logo. They will be given away at events in Alabama.

*"I would like thank ASI for providing funds to help promote wool products in our state."*

*Mitt Walker, Director*

### **Arizona Wool Producers Association - \$3,935.00**

Total costs of Wool Outreach-related projects: \$4,210.69

- Sponsored the MIWW contest for Arizona with 22 contestants;
- Donated wool pelts as door prizes to various organizations and promoted sheep industry products throughout the year.

### **Arkansas State Sheep Council - \$1000.00**

Total costs of Wool Outreach-related projects: \$1305.00

- Provided awards to participants in the Shepherd's Lead contest;
- Presented awards to the Junior Breeding Sheep classes at the Arkansas State Fair.

### **California Wool Growers Association - \$14,574.00**

Total costs of Wool Outreach-related projects: \$16,071.00

- Covered costs relating to the assembling and shipping of educational packets to teachers, 4-H members/leaders, FFA members/advisors, county fair display coordinators, etc.;

- Covered costs for educational booth setup at the California Ag Day Celebration. Displayed wool items and distributed educational materials. Attended by over 3,500 individuals;
- Maintenance and upkeep of traveling table top Display, which highlights the sheep industry, wool, lamb, the environment and livestock protection;
- Supported the California Ram Sale by making available a wool micron machine for producers to submit their wool samples. Also made available a pen of high-quality, bred wool sheep. These two events helped producers make better genetic selections when purchasing a ram for quality wool;
- Supported the California Wool Growers Associations annual meeting by covering handouts and speaker costs. Wool marketing opportunities, creating marketing niches and responses to niche products were discussed;
- Assisted with shows through sponsorships throughout California including the Natural Colored Wool Show and the California Wool and Fiber Festival.  
*“Thank you for the opportunity to expand our wool promotional ability in California, we have reached thousands of consumers, users and producers.”*  
*Lesa Carlton, Executive Director*

**Colorado Wool Growers Association - \$8,307.00**

Total costs of Wool Outreach-related projects: \$11,970.61

- Purchased Lyco Dominator wool press. Machine will encourage small producers to sell their wool. Will also be used as a backup for range producers.  
*“We appreciate the important contribution the American Wool Council has made to this important program to sustain and advance the Colorado wool industry.”*  
*Bonnie Brown, Executive Director*

**Connecticut Sheep Breeders Association - \$1000.00**

Total costs of Wool Outreach-related projects: \$4,009.96

- Printed and distributed a directory containing contact information for Connecticut wool producers, regional wool processors, plus spinning and weaving guilds and information on upcoming wool events;
- Paid for grounds rental, Fleece to Shawl Contest and spinning bee for the 101<sup>th</sup> Annual Sheep, Wool and Fiber Festival. Presence stimulates niche market sales of wool and increases awareness of wool crafts in our heritage. Selling fleeces is also part of the festival;
- Conducted a Blue Ribbon Forum at the University of Connecticut, which included a presentation on skirting and introduction and planning for the blanket program;
- The Connecticut Blanket project grew to 50 producers who contributed wool and had it scoured, spun and woven. It will be finished into blankets to be used to teach the value of good wool management, as well as create a quality product. The Connecticut Blanket project is self-funded;
- Supported youth programs;
- Staffed a one-day booth at the Eastern States Exposition. It provides demonstrations and education regarding wool products, wool fiber preparation, spinning and crafts.  
*“The Connecticut Sheep Breeders Association has been able to continue to educate woolgrowers about issues affecting domestic wool quality. We have also sought to build and improve niche marketing opportunities as well as consumer awareness and appreciation of our product. We sincerely wish to thank ASI and the Wool Outreach Program for this valued support.”*  
*Catharine Andresen, Connecticut Sheep Breeders Association*



### **Meat Sheep Alliance of Florida - \$1,000.00**

Total costs of Wool Outreach-related projects: \$1,000.00

- Supported events at the Central Florida Fair. These events emphasized the production of quality wool sheep in tropical climates and also provided visitors with knowledge of how wool producers improve the quality of products. Other events include the Fitting and Grooming Competition, The Wool Show and Sheep Show (which brought 200 sheep and 150 exhibitors to participate) and the Ag Ventures Sheep Display. The wool sheep breeders continue to introduce higher quality wool breeds into their flocks to improve their wool quality;
- Support travel expenses for youth liaisons for the Florida sheep industry to travel the state. The alumni of this program introduced a scholarship program in 2009 for graduating high-school seniors who have excelled in wool breed sheep production throughout Florida. They were able to award two scholarships this year.  
*“These sponsorships for wool promotion would not be possible without the wool improvement funds for Florida. We have seen a renewed interest in wool breeds and wool quality in Florida since we began promoting wool improvement demonstrations.”*  
*Doug Meyers, President*

### **Georgia Sheep and Wool Growers Association - \$1,000.00**

Total costs of Wool Outreach-related projects: \$1,047.00

- Supported a regional wool pool to market wool with the Tennessee Sheep Producers Association. “Bale-ready” wool was transported with Wool Outreach funds in livestock trailers to Tennessee.
- Conducted value-added projects through which wool growers could have wool processed into blankets, batting, roving or yarn and socks. This year, 12 producers participated, and seven of those were new this year;  
*“The Georgia Sheep and Wool Growers Association appreciates what ASI does for us, and we are especially thankful for the Wool Outreach funds.”*  
*Tom Huber, Executive Secretary*

### **Hawaii Sheep and Goat Association - \$1,000.00**

Total costs of Wool Outreach-related projects: \$1,000.00

- The spinning wheel and other items purchased with past years’ funds continue to be used to build momentum. Demonstrations continue to be held at food tastings, farmer’s markets and other events to draw curious people to learn about wool processing;
- This past year, a hand weaver group was formed, and they held workshops to teach spinning and wool felting. They will also have sheep to shawl demonstrations at schools, festivals, farmer’s markets and art studio tours.
- Purchased a table loom for demonstrations.  
*“Using Wool Outreach funds, Hawaii has been able to create awareness that there is wool production in Hawaii.”*  
*Jan Dean, President*

### **Idaho Wool Growers Association - \$7,433.00**

Total costs of Wool Outreach-related projects: \$7,433.00

- Supported the 13<sup>th</sup> annual “Trailing of the Sheep Festival” by covering expenses for presenters who demonstrated fiber arts and working with wool, i.e. washing, carding, spinning and weaving as well as shearing. A weaver also held a workshop, “Working with Wool”;

- Donated money to 4-H Lamb Camp, Elmore County Extension to help youth experience the importance of the sheep industry;
- Supported a display to promote the wool industry at the Western Idaho and Eastern Idaho State Fairs. The Ag Pavilion is visited by more than 10,000 people.
- Provided awards to the MIWW contest winners in each division;
- Covered travel and lodging expenses for a wool speaker at the Idaho Wool Growers Association Convention;
- Promoted the wool industry to thousands of participants at the Jaialdi Basque Festival.  
*“Thank you for consideration for this program. As you can see it has greatly contributed to the promotion of wool education in Idaho.”*  
*Stanley Boyd, Executive Director*

**Illinois Lamb and Wool Producers, Inc. - \$1,846.00**

Total costs of Wool Outreach-related projects: \$2,020.00

- Sponsored a shearing contest in conjunction with the Illinois State Fair, 12 shearers from seven states competed.
- Sponsored the Prairie Weavers Guild at the Illinois State Fair to demonstrate spinning, knitting and weaving;
- Sponsored MIWW contest.  
*“The Wool Outreach program is an excellent opportunity to support wool promotion in Illinois.”*  
*Jane Zeien, Executive Secretary*

**Indiana Sheep Association - \$1,773.00**

Total costs of Wool Outreach-related projects: \$3,543.00

- Covered costs for the website and promotional material such as *Sheep Tales* magazine. Twelve pages of *Sheep Tales* are used for wool and fiber promotion and education;
- Funded part of the MIWW contest and provided travel for winners to the national contest;
- Sponsored the Wool Room at the Indiana State Fair. Changes were made including the addition of demonstrations, updated displays, wool garments and merchandise.  
*“This year we were able to continue our promotion of wool and fiber in Indiana, and the funds helped make this possible.”*  
*Duane Sickels, Indiana Sheep Association*

**Iowa Sheep Industry Association - \$6,170.00**

Total costs of Wool Outreach-related projects: \$7,637.00

- Sponsored the sixth annual Sheep and Wool Festival. Funds covered rent of buildings, advertising, judging and ribbons for fleece show, supplies, travel compensation, donation to Spinner’s Guild for assistance, tent for children’s fiber classes, professional shearer, and handouts. The fleece show exhibited 39 fleeces, six breeds were on display in the Hall of Breeds and new this year was the Fiber Fun for Kids. Attendance at the festival is steadily growing;
- Donated to the Iowa State Fair shearing contest.
- Sponsored first Annual Iowa Wool Gatherers’ Retreat. Fiber art classes were conducted to promote the use of wool.



**Kansas Sheep Association - \$2,429.00**

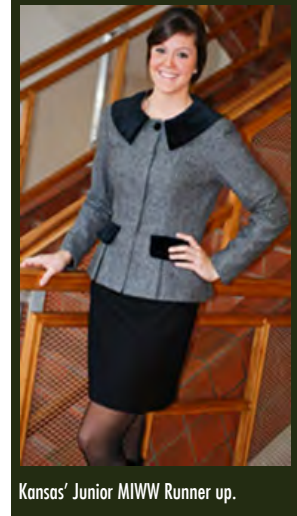
Total costs of Wool Outreach-related projects: \$4,982.81

- Provided help with expenses for MIWW contests at district, state and national levels; added a MIWW website for the state to help disseminate information. This year Kansas had the first runner up in the junior division at the national contest;
- Purchased literature, wool roving and products and booth rental fees for the Kansas State Fair. More than 10,000 pieces of literature were handed out during the 10 days of the fair.

**Kentucky Sheep and Wool Producers Association - \$1,312.00**

Total costs of Wool Outreach-related projects: \$2,642.82

- Contributed to the Kentucky MIWW contest to assist with travel expenses, awards and prizes;
- Supported the first annual Kentucky Sheep and Fiber Festival. Photo, fleece and skein contests were held with 25 contestants and 2,500 visitors.



**Maine Sheep Breeders Association - \$1,000.00**

Total costs of Wool Outreach-related projects: \$1000.00

- Sponsored two beginning shearing schools attended by 36 participants. These schools make an effort to equip beginners with sound shearing skills and knowledge;
- Sponsored a wool pool for producers at the Northeast Livestock Exposition. Costs covered wool bags. Approximately 4,000 pounds of wool was marketed through the wool pool;
- Promoted a tour of three wool-related operations for 25 producers in an effort to promote quality product and to develop networks for processing and promotion. The operations covered scouring, raw wool processing and a wool retail shop;
- Used funds to purchase a Showtime briefcase compact presentation system to be used at county fairs and other agricultural events in Maine.

*"The Maine Sheep Breeders Association is grateful to ASI for access to the Wool Outreach funds."*

*Dr. Richard Brzozowski, Treasurer*

**Maryland Sheep Breeders Association - \$1,000.00**

Total costs of Wool Outreach-related projects: \$1,000.00

- Applied total funds to MIWW contest. Twenty-five contestants participated this year. The state's senior contestant won the Senior Division at the National MIWW contest.

**Massachusetts Federation of Sheep Associations - \$1000.00**

Total costs of Wool Outreach-related projects: \$1,158.25

- Provided wool prizes for the lead line competitions throughout the state;



- Provided support for the Baaay State Blanket project, which collected approximately 2,500 pounds of wool from 38 farm members, wove it into yarn within the state and wove into blankets within the state;
- Participation in the inaugural Fiber Festival of New England.

**Michigan Sheep Breeders Association - \$2,429.00**

Total costs of Wool Outreach-related projects: \$2,429.00

- Covered costs of prizes for the sheep shearing contest at the Ogemaw Heights FFA Sheep Shearing Contest;
- Contributed toward the state MIWW contest.
- Promoted the Michigan Fiber Festival Wool Sheep Show.

*“These events are all excellent opportunities to promote wool, wool breeds and the process of harvesting wool.”*

*Ben Tirrell, Executive Secretary*

**Minnesota Lamb and Wool Producers - \$4,275.00**

Total costs of Wool Outreach-related projects: \$4,928.00

- Defrayed costs for the annual conference;
- Upgraded website for inclusion on the importance of the wool clip;
- Sponsored a Ba Booth, a hands-on educational booth and a commercial booth at the Minnesota State Fair;
- Contributed to Shepherd’s Harvest, an annual wool-oriented event held every year on Mother’s Day;
- Sponsored two state MIWW contestants to the National Competition;
- Sponsored a youth workshop in the spring.

*“The producers value the support and look forward to the American Wool Council for direction in the years ahead.”*

*Michael Haubrich, Region 4 Director*

**Missouri Sheep Producers - \$3,012.00**

Total costs of Wool Outreach-related projects: \$5,259.97

- Sponsored the state MIWW contest for five contestants and covered expenses for the two winners to attend the national contest;
- Donated to the first annual Hallsville Sheep Clinic for statewide youth. It was attended by over 120 people and covered shearing, wool spinning, fitting and showing sheep, sheep judging, vet care and sheep nutrition.
- Covered premiums for participants in leadline activities throughout the state. Over 20 individuals participated in six different events.
- Defrayed costs for Rural Missouri Spinners’ Dye Day, Rural Missouri Spinners’ Spin In, Missouri State Fair and the Herman County Fair. These events displayed everything from dyeing yarn, classes on spinning yarn, turning fleece into yarn and then into final product.
- Supported the 2010 World Sheep and Fiber Arts Festival where the public was educated on sheep and the process of taking raw wool from beginning to finished product.

*“The primary goal of the Missouri Sheep Producers is to promote and develop the sheep industry in Missouri. The annual ASI wool grant is a vital part of these programs and we look forward to the continued cooperation with the national organization.”*

*Scott Kaden, Executive Director*

**Montana Wool Growers Association - \$9,084.00**

Total costs of Wool Outreach-related projects: \$10,000.00

- Sponsored booths at MATE Winter Fair in Lewistown, the GATE in Glendive, Montana Association of Spinners and Weavers, and the Billings Home and Garden Show. Expenses covered were the booth rental and travel expenses;
- Contributed to the state's MIWW contest;
- Defrayed costs for *Montana Wool Grower* publication. Articles on wool preparation, handling and shearing contests, sampling individual animals for micron testing and wool promotion appeared in the publication;
- Sponsored events at the Ram Sale such as a producer informative session, shearing contest, noon luncheon and wool pelt giveaway;
- Contributed to state wool convention with wool booths displaying wool garments, pelts, spinning classes and shearing contest. Also included were wool preparation talks from the extension service and wool buyers;
- Donated to Reed Point Sheep Drive, a shearing school in Bozeman where a tool grinder was purchased, Last Chance Stampede sheep and wool display, WIFE (Women in Farm Economics), two pages in a coloring book dedicated to sheep production and Montana Bucking Horse Sale building rental for shearing contest.

#### **Nebraska Sheep and Goat Producers - \$2,380.00**

Total costs of Wool Outreach-related projects: \$3,458.07

- Donation to MIWW to help offset costs of state delegates;
- Paid for winter article to appear in Nebraska Sheep and Goat Producers quarterly newsletter promoting wool. This article was about managing sheep for wool production, reminding producers that the price they receive for wool first starts with the quality of the wool they're selling;
- Paid for spring article to appear in Nebraska Sheep and Goat Producers quarterly newsletter promoting wool. This article was about the national wool market, allowing people to see the broad vision of the market showing that the market is bigger than the narrow perspective in the state;
- Paid for summer article to appear in Nebraska Sheep and Goat Producers quarterly newsletter promoting wool. This article was about a small fiber mill in Nebraska, which is working to increase the local wool market.

#### **Nevada Wool Growers Association - \$2,235.00**

Total costs of Wool Outreach-related projects: \$2,985.00

- Applied all funding to the state's MIWW contest. The funding was used to purchase sewing supplies and prizes for the 10 contestants.  
*"The Nevada MIWW Contest sincerely appreciates ASI and Nevada Wool Growers supporting our program and providing the outreach monies."*  
*Jill Tingey, MIWW Director*

#### **New Hampshire Sheep and Wool Growers - \$1,000.00**

Total costs of Wool Outreach-related projects: \$6,152.00

- Funded several educational events conducted at the annual New Hampshire Sheep and Wool Festival. These events included workshops on historic wool dyeing methods, knitting and crocheting, card weaving, fine felted beads, nuno felted flowers, lecture on how to manage your flock for optimum fleece production and demonstrations on wool crafting, fleece to garment youth team, weaving and spinning, preparing for the shearer and some family fun activities. Also held a fleece show and sale, handmade with fiber show and handspun skein contest.

**(New Jersey) Garden State Sheep Breeders, Inc. - \$1,000.00**

Total costs of Wool Outreach-related projects: \$10,165.04

- Covered expenses for show premiums awarded for wool and wool-related activities during the Garden State Sheep Breeders Festival, the Somerset 4-H Breed Show and the Hunterdon County 4-H Club Show. These shows judged over 100 fleeces this year. *“On behalf of the Garden State Sheep Breeders Association, we would like to thank you for your generous support.”*  
*Joan Schnieber, Treasurer*

**New Mexico Wool Growers, Inc. - \$4,275.00**

Total costs of Wool Outreach-related projects: \$4,743.80

- Co-hosted an agriculture reception for urban residents, New Mexico decision makers and producers that provided education on the value and importance of the sheep and wool industry to the state’s custom, culture and rural economics;
- Covered costs for the association’s annual convention including meeting rooms and travel expenses. The convention had timely and important issues presented;
- Helped offset costs of newsletter development, production and distribution for quarterly *Shear Wisdom* newsletter, which keeps producers current on the latest news in the industry including programs they may be eligible for, research and market information;
- Contributed to the Sheep to Shawl booth during the New Mexico State Fair. Demonstrations of all steps of wool production from shearing to dyeing to weaving were presented.

**New York Empire Sheep Producers - \$2,089.00**

Total costs of Wool Outreach-related projects: \$2,261.49

- Sponsored the Wool Center at the New York State Fair. All aspects of wool production- washing, drying, dyeing, carding, spinning, knitting, weaving and felting - were shown throughout the fair. More than 150,000 people visit the center each year;
- Contributed to expenses for two MIWW finalists to attend the national competition;
- Sponsored the wool show at the Finger Lakes Fiber Arts Festival.

**North Carolina Sheep Producers Association Inc. - \$1,000.00**

Total costs of Wool Outreach-related projects: \$2,075.00

- Allotted money for prizes, fabric, meals and paid airfare for two winners to attend the national MIWW contest;
- Helped fund a booth at North Carolina’s State Fair to educate fair goers on the sheep business. Literature and other promotion items were distributed. Wool Wax Cream for resale was purchased to help secure adequate funds for future events. Trophies were awarded at the North Carolina Bred and Owned Ewe Show. *“Our nation is at a time where change is evident and as producers, we are going to have to learn to adjust with current policies, regulations and laws. This is the most crucial time that we band together with one another, and with the help of associations such as ASI, we can learn, grow, and prosper for future generations. It is critical for many of the smaller associations such as the North Carolina Sheep Producers to receive outside additional resources for use to be able to offer such worthwhile programs.”*  
*Brent Jennings, President*

**North Dakota Lamb and Wool Producers - \$2,769.00**

Total costs of Wool Outreach-related projects: \$2,770.00

- Covered costs for the state's MIWW contest winners to attend the national competition in Nashville, Tenn.;
- Supported a shearing school in conjunction with the North Dakota State University Hettinger Extension Research Center. There were 19 participants and six additional students to attend a Wool Handling School;
- Conducted a shearing contest at the North Dakota State Fair with 24 participants coming from four states and Canada. It was watched by more than 400 people.



Participants in Ohio's MIWW contest.

**Ohio Sheep Improvement Association - \$3,984.00**

Total costs of Wool Outreach-related projects: \$6,022.34

- Covered costs for the state's MIWW contest, including prizes, administrative costs, facility and equipment rental and travel to the national contest. The contest drew nearly 50 participants. MIWW has brought much publicity in our school systems and potential wool customers to the value and diversity of the wool product;
- Promoted the Daily Wool Award in conjunction with the Ohio State Fair. Award given to the entrant that displayed a superior use of wool fibers and/or fabrics.  
*"A tremendously successful MIWW contest has been in progress for several years, but never before have we been able to do as much with the program as in the past couple of years since receiving Wool Outreach funds."*  
*Roger High, Executive Director*

**Oregon Sheep Growers Association - \$6,218.00**

Total costs of Wool Outreach-related projects: \$6,218.00

- Hosted a sheep booth at the Oregon Ag Fest. Exhibits included spinning demonstrators with hands-on projects for the kids, displays focusing on the variety of uses for wool including wool insulation. Upwards of 17,000 people attend this event.
- Supported the state MIWW contest. Funds help support website maintenance and covered expenses related to the contest.
- Supported the 4-H Wool Fashion Awards at the state fair level and the FFA Wool Chapter Award. Also purchased a Pendleton blanket commemorating the centennial year for the Pendleton Round-up to be displayed at the state capitol.

**Pennsylvania Sheep and Wool Growers Association - \$3,401.00**

Total costs of Wool Outreach-related projects: \$5,696.89

- Covered costs for the state MIWW contest held at an outlet shopping center, such as the printing of programs and brochures, the purchase of prizes and travel expenses for the senior winners and the committee chairperson to attend the national competition;



Spinning demonstrations at the Oregon Ag Fest sheep booth.

- Covered costs for Sheep to Shawl and youth Fleece to Shawl competitions held in conjunction with the State Farm Show;
- Funds provided contest supplies and awards for participants of the Pennsylvania Sheep Field Day. One event held was a quiz bowl covering knowledge of sheep breeds, shearing techniques and wool handling methods.
- Sponsored awards for a junior sheep exhibitor leadline competition;
- Covered mileage expenses for the Sheep and Wool Queen to attend sheep and wool promotional and educational activities;
- Contributed to advertising costs for the Washington County Sheep and Wool Association and Penn State Extension shearing school.

*"I would like to take this opportunity to thank you for sponsoring the Wool Outreach Program."*

*Greg Hubbard, Treasurer*

### **South Carolina Sheep Industries Association - \$1,000.00**

Total costs of Wool Outreach-related projects: \$1,150.00

- Covered expenses for 4-H members to attend the Southeastern Animal Fiber Fair. These students are involved in felting/spinning projects;
- Donated towards funding the "wool page" on South Carolina's website;
- Covered printing wool brochure to be distributed at Southeastern Animal Fiber Fair and the South Carolina State Fair;
- Allocated funds for processing South Carolina shepherds' wool.

### **South Dakota Sheep Growers Association - \$10,347.00**

Total costs of Wool Outreach-related projects: \$10,347.00

- Donated to the state MIWW program;
- Donated to a lead-in contest. Contestants construct an outfit made from wool fabric and also a coordinating blanket for their ewe;
- Prizes for the 4-H Sew Your Own project held in conjunction with the South Dakota State Fair;
- Sponsored shearing school at South Dakota State University (SDSU). Participants learned professional shearing patterns, proper use and care of shearing equipment and proper handling and packaging of fleeces.
- Purchased and provided wool pelts for the Annual Lamb Bonanza held at SDSU's Frost Arena. The pelts, bearing the SDSU logo, were auctioned off, with the proceeds going to the SDSU Department of Animal and Range Sciences program. Information on the sheep industry was distributed to almost 8,000 attendees;
- Sponsored a wool contest at the South Dakota State Fair. Prizes were awarded on the condition and quality of the fleece. Approximately 50 fleeces from a number of different breeds were entered.
- Contributed to the Junior Wool Classic show. Emphasis is placed on the quality of the wool on the sheep;



Learning to shear at the South Dakota State Shearing School.



- Provided cash awards for the Newell Ram Sale Fleece Contest. Four states participated;
- Helped to offset expenses for the South Dakota State University Wool Judging team. They are taught how to accurately judge fleeces based on grade, quality, and to explain their results in an oral form;
- Distributed materials through mailings, meetings and annual convention. Promotional items are distributed to producers. Sponsored educational program for elementary students reaching 1,200 students and 400 adults in two days. They were exposed to live animals, processing and spinning and finished products and wool garments.



**Tennessee Sheep Producers Association** - \$1,069.00  
 Total costs of Wool Outreach-related projects: \$1,402.57

- Sponsored the Tennessee Junior Fleece Show with 62 entries;
- Donated money to the state MIWW contest;
- Money was allocated toward expenses of the State Wool Pool including the purchase of the nylon wool bale packs.

**Texas Sheep and Goat Raisers' Association** - \$27,204.00  
 Total costs of Wool Outreach-related projects: \$32,576.26

- Sponsored the fall and spring issues of *Conservation Roundup* for children, sponsored the GMA7 Water Conference, made a contribution to the Texas County Agricultural Agents convention and made donations to many other agriculture-related meetings;
- Made a donation to "Sheeptacular," which organized placing 53 life-size fiberglass sheep around the city of San Angelo. Texas Sheep and Goat Raiser's have one in front of its building;
- Covered expenses for a booth at the Conference for the Advancement of Science Teaching. This is attended by fact-based science teachers from within Texas and many surrounding states;
- Sponsored Wool and Mohair House at Ft Concho National Historic Site by demonstrating sheep dogs, sheep shearing, spinning, quilting, cleaning and dyeing of wool and mohair and making of handmade felt;
- Covered portion of costs of *Ranch and Rural Living Magazine*, which promotes wool.

**Utah Wool Growers Association** - \$11,125.00  
 Total costs of Wool Outreach-related projects: \$14,000.00

- Contributed to sheep and wool education programs in the school curriculums including the publication of an educational insert into the *Deseret Morning News* and circulated to 675,000 households;
- Co-sponsored the Sheep and Goat Education Day. Part of the day is a wool show during which participants were exposed to many fleeces and educated as to their various qualities;
- Supported the state's MIWW program;
- Sponsored the "Little Hands on the Farm" at the Utah State Fair. This is a hands-on experience for children with exhibits showing the various aspects of agriculture with

emphasis on the production of wool, how it is shorn and the sale of that wool. They get to shear a model sheep and then exchange wool fleece for goods. This program reaches the next generation and educates them about the real world and the advantages of “natural fibers”;

- Printing and mailing of the quarterly newsletter with market reports and contributions from major buyers and handlers along with tips on shearing and producing a quality clip;
- Contributed to the First Annual Utah Wool Marketing Association Wool Auction;
- Utah makes many other contributions throughout the state for various events.

*“We would not be able to institute any new programs nor continue many of these projects and events were it not for the assistance given by the Wool Outreach program.”*  
*Douglas Livingston, Executive Secretary*



The Utah Wool Growers Association sponsored the first annual Utah Wool Marketing Association Auction.

**Vermont Sheep and Goat Association - \$1000.00**

Total costs of Wool Outreach-related projects: \$1000.00

- Created a portable, traveling barn that carries curriculum, resources and books to schools and events across the state. The barn includes educational activities, samples of raw wool, carded fiber, spun fibers, finished knitted garments and pillows. Farms have also agreed to be available for visitors and school field trip groups.

**Virginia Sheep Producers Association - \$2,478.00**

Total costs of Wool Outreach-related projects: \$2,955.02

- Funded a beginner’s sheep basics school. Shearing, wool handling and preparation and marketing were conducted at the school. Special focus was given to the proper production and marketing of wool. A handbook of reference materials is given to each participant;
- Covered expenses in conjunction with the Virginia-North Carolina Shepherds Symposium. Growers shared information and learned more about wool products. More than 150 producers attended;
- Supported expenses associated with launching a website to serve as a directory for producers marketing sheep and wool products;
- Contributed toward the leadline contest held at the state fair.



The Vermont Sheep and Goat Association traveling barn, which carries curriculum about wool production.

**Washington State Sheep Producers - \$1,797.00**

Total costs of Wool Outreach-related projects:  
\$4,231.33

- Organized and conducted a Washington State Sheep Producers Shearing School and Producer Education with a one-day class for advanced sheep shearers and five days of classes for beginning shearers. Seventeen beginning and seven advanced students learned proper shearing techniques, equipment care and handling and wool production and marketing as well as issues involving sheep husbandry, animal handling and animal welfare. Evaluation was done last year and of the 40 percent that responded, 85 percent are shearing. They provided services and education to more than 900 fiber animal operation, sheared over 29,000 head annually and reported that shearing provides between \$80 and \$25,000 of their total annual income.

*Thank you for allowing us this financial opportunity.”*

*Sarah Smith, Extension Faculty, Washington State University*



**West Virginia Shepherds Federation - \$1,166.00**

Total costs of Wool Outreach related projects: \$1,207.93

- Funded a ramp for a wool baler transport trailer and installed a winch that allows the balers to be unloaded and loaded much safer and easier. Also purchased a new set of scales.

*“We try to use these dollars in ways that do the most good for the benefit of the most producers.”*

*Ron Fletcher, President*

**Wisconsin Sheep Breeders Cooperative - \$2,769.00**

Total costs of Wool Outreach-related projects: \$2,769.00

- Made donation to Wisconsin Sheep and Wool Festival, a three-day event that drew 700 sheep, 150 vendors and 750 fiber art class registrations. It consisted of fleece shows, sheep shows and leadline competitions;
- Provided monies to purchase Pendleton wool awards for the state contest and covered travel expenses for state MIWW contestants to the national contest;
- Made a deposit to secure a spot to hold an educational and promotional event.

*“Many thanks to ASI for supporting our state efforts in sheep and wool promotion.”*

*Jill Alf, Executive Secretary*



A young competitor at the Wisconsin Sheep and Fiber Festival fleece show.

**Wyoming Wool Growers Association - \$13,116.00**

Total costs of Wool Outreach-related projects: \$66,700.00

- Hosted a three-day, statewide annual meeting, in conjunction with other Wyoming organizations. More than 400 producers attended along with industry supporters, governmental agencies and elected officials. This meeting focused on many topics of importance and applicability to the Wyoming sheep and wool industries including the “Profitability in Livestock and Natural Resource Management Conference”;
- Conducted a meeting before the annual Ram Sire Test Field Day. The latest information and technology in regards to the Wyoming sheep and wool industry was featured and showcased;
- Helped sponsor the “Ram Sire” test; 78 ram lambs participated. Testing again exceeded the performance of previous years indicating steady progress is being made in advancing the genetics of the sheep industry;
- Purchased monthly space for association coverage in the *Wyoming Livestock Roundup* (circ. 9,000) for the timely transfer of important information;
- Publishing *Producer Update* provides information on a more timely and in depth basis;
- Wyoming Wool Growers is helping stabilize the sheep production base and making available new or increased opportunities for sheep and wool production through outreach and information to outside entities; such as federal land management agencies, wildlife management agencies and non-traditional groups industry has aided in. Wyoming is also committed to utilizing sheep for targeted or managed grazing systems and situations;
- A new undertaking for the association is an effort to explore, develop and increase the markets for sheep, wool and lamb. A specific undertaking was in the cull ewe market. It is also looking into using wool for oil spill cleanup by cooperating with an oil field services company in a new process providing them with the type and quantity of wool they need for the project. Hopefully, this will benefit our country while increasing markets for American wool.

*“These funds are extremely helpful to this, as well as the many other, organizations who are trying to maintain our sheep and wool industry infrastructure and provide what we believe are crucial and necessary services to our industry.”*

*Bryce Reece, Executive Director*

**Wool Outreach Funding Applied to MIWW Projects**

Arizona -	\$2,518.00	New York -	564.00
Idaho -	875.00	North Carolina -	590.00
Illinois -	923.00	North Dakota -	650.00
Indiana -	550.00	Ohio -	3,904.00
Kansas -	1,943.00	Oregon -	3,160.00
Kentucky -	564.00	Pennsylvania -	1,360.00
Maryland -	1,000.00	South Dakota -	4,500.00
Michigan -	1,000.00	Tennessee -	118.00
Minnesota -	171.00	Utah -	2,003.00
Missouri -	723.00	Wisconsin -	1,200.00
Montana -	908.00		
Nebraska -	690.00	<b>TOTAL: \$32,149.00</b>	
Nevada -	2,235.00		

*Percentage of Round 10 Wool Outreach Funding spent on MIWW activities: 18 percent.*

**Recommendations**

State sheep organizations are an important ally for ASI in achieving its objective of improving marketing options for U.S. wool growers. Their local ties are invaluable in bringing ASI's quality improvement message home to the regional wool industry. Wool outreach should continue as a part of ASI's overall plan to improve the quality and competitiveness of U.S. wool. Local organizations also provide meetings throughout the year that thousands of producers attend to discuss industry programs.

**Appendices**

Sample of application for Wool Outreach program  
Summary of all 10 rounds of Wool Outreach Program



**Summary**

ASI disseminated information on quality improvement methods and new technology available to the industry, kept producers informed of animal health issues, provided educational programs, disseminated information on wool and lamb prices and sales and solicited participation in marketing programs. Also, under the Producer Communications Program, ASI kept producers informed of activities and programs carried out under the Wool Trust Fund, enabling them to fully participate and gain the most benefit from marketing and quality improvement initiatives. This participation was essential in completing overall objectives of the Wool Trust Fund. Communications included production of ASI's monthly tabloid, *Sheep Industry News*, ASI's weekly newsletter, *ASI Weekly*, press releases, brochure development, website maintenance, weekly mailings and other materials that were disseminated to producers and/or the public and media.

**Project Description/Results**

Funds expended under this project went toward the following: producer publications, printing materials, media, annual wool convention and website. These five areas comprised the key methods for communicating with the wool industry and

disseminating information on quality improvement methods. For instance, producer publications kept U.S. sheep producers and related industries informed of major industry issues and helped the U.S. industry become more responsive to market situations. Media work garnered higher visibility for the U.S. wool industry in agriculture and the general population, thus

**Wool Trust Goal Addressed by This Project:**

Disseminate information on wool improvements to U.S. wool producers

**Project Goals**

- ✓ *Keep U.S. sheep producers informed of the activities of ASI in regard to the programs and issues of interest to producers and the sheep and wool industries*
- ✓ *Disseminate information to producers on programs and improvements in the wool industry*
- ✓ *Maintain ASI as the chief source of information during an emergency with the continued updating and testing of a Crisis Management Plan that can be accessed in the event an industry issue arises*

contributing to market development. Printed materials were the venue that ASI was able to disseminate general materials about the U.S. sheep and wool industries and specific information about U.S. wool quality improvement programs.

Following is a summary of communications activities carried out in FY2009/20010:

- *Producer Communication Materials*

### ***Sheep Industry News***

ASI published 12 issues of the *Sheep Industry News*, which contained numerous articles of interest regarding the viability and profitability of the sheep industry. Various issues contained articles about ways producers can improve wool production profitability or current developments or changes in the wool industry. Articles also were published updating readers on the status of programs being conducted through the Wool Trust Fund. The *Sheep Industry News* is mailed to approximately 8,200 individuals and businesses combined, with the main audience consisting of U.S. sheep producers.

With the goal of covering diverse stories from around the country that pertain to the sheep industry, the associate editor was tasked with monthly field assignments. The covered stories and photographs were then reported within the *Sheep Industry News*. The field assignments during this past fiscal year include:

- October 2009 – Rhode Island
  - Hanora Spinning/Polartec, Woonsocket, RI
- November 2009 – Nevada
  - Nevada Wool Growers Association Annual Meeting, Reno, NV
- December 2009 – South Dakota
  - South Dakota Shearing School, Brookings, S.D.
- January 2010 – Tennessee
  - Annual Convention Coverage, Nashville, TN.
- February 2010 – Alabama
  - Alabama A & M Sheep Program, Huntsville, AL
  - Alabama A+ Marketing Association (lamb cooperative), Florence, AL
  - D & W Meat Processing, Newton, AL
- March 2010 – Wisconsin, Oregon
  - Wisconsin Dairy Sheep School, Spooner, WI
  - Crescent Woolen Mill, Two Rivers, WI
  - Wigwam Mills Inc., Sheboygan, WI
  - Reed Anderson/Anderson Ranches Lamb, Brownsville, OR
  - Jam to Lamb/Blue Pines Ranch, Lone, OR
  - Cunningham Sheep Co., Pilot Rock, OR
- May 2010 – California
  - Rominger Bros., Winters, CA
  - Wooly Weed Eaters, Sonoma, CA
  - Jeannie McCormack, Montezuma Hills, CA

- June 2010 – Arizona, Iowa, Minnesota
  - Sheep is Life Celebrations, Tsaille, AZ
  - Iowa State University Ultrasound Certification Course, Ames, IA
  - Janet McNally/Livestock Protection Dogs, Hinckley, MN
- July 2010 - Ohio
  - ASI Regional Genetics Conference, Powell, OH
  - Blystone Farms, Canal Winchester, OH
  - Hawk's Skyline Farms, Danville, OH
- August 2010 – New York
  - Cornell University Sheep Program, Ithaca, NY
  - Finger Lakes Woolen Mill, Genoa, NY
  - Old Chatham Shepherding Co., Old Chatham, NY
- September 2010 – Michigan
  - Michigan State University, Lansing, MI
  - Wolverine Packing, Detroit, MI
  - Frankenmuth Woolen Mill/Zeilinger Woolen Mill, Frankenmuth, MI

In addition to feature articles on wool, each edition contains a wool market update consisting of current situations and projections for wool market prices, supplies and/or trends. Major feature articles published between October 2009 and September 2010 covering wool industry-related issues include:

- Sheepusa.org Gets a New Look
- Re-building the U.S. Sheep Inventory
- Using Wool Fiber Diameter Testing for Flock Improvement
- ASI Talks American Wool at Outdoor Retailer Show
- 2009 Wool Seminar and Tour Takes Wool Back to the Ranch
- Wool Education Highlight at Executive Board Meeting
- U.S. Sheep Inventory
- Ramblers Way Farm Embarks on Wool Enterprise
- ASI Approves Budgets; Looks to Strengthen National Flock
- Jensen Apparel Takes on Berets for U.S. Military
- Major International Wool Buyers Visit U.S. Wool Centers
- Lower Wool Production to Supply Prices
- Gainer Elected First Woman President of Rambouillet Association
- Re-build the Sheep Inventory Committee Named
- Pendleton Wool Manager Talks Quality
- Advancing China's Importance in the International Wool Conference Arena
- Wool Market Rebounds
- Polypropylene a Cost to All
- Shearing Demos at L.A. County Fair
- Supporters of the Certified Wool Program





- Imperial Stock Ranch: From Ranch to Runway
- Polartec Looks to U.S. Wool for New Products
- USDA Scientist Honored for Innovative Wool Processing Technique
- Re-build Committee Concludes First Meeting
- Fine and Medium Wool Commercial Sheep Directory
- Wool Consuming Countries in 'Recovery' Phase
- 2009-2010 U.S. Shearing Schools
- Perspective on the South Dakota Shearing School
- 2010 Wool LDP Rates Announced
- ASI Member Survey
- Wool for Warmth and the Planet
- Volatility Defines Wool Market
- Wool Carpet Part of Eco-friendly Medical Center
- 2010 Sheep and Wool Congress Set for Sydney
- Approval of CIDR for Sheep
- Wool Mill Tour for Shearing Crew Managers
- New Test May Help Address Costly Parasite in Sheep Industry
- Mountain Meadow Wool Brings Traceability to Wool Products
- Wool Market Beats Expectations
- Wool Heating Qualities Promoted
- France to Host World Merino Conference
- Stronger Markets Bring Positive Attitude to Convention
- Undersecretary Avalos Talks Sheep with Producers
- ASI Elects New Executive Board Members
- Wool Excellence Award Winners
- Results of ASI Paint Brand Trial
- Wool is Good Fit for Ramblers Way
- National MIWW Winners Chosen at Annual Competition
- Sheep Industry Awarded SBIR Grant
- Re-build Committee Keeps Positive Attitude in Discussions
- January Australian Wool Prices Rising
- Improvements in the 2010 Wool Market
- American Sheep Shearer Council Created
- NWSS Sheep Shearing Contest
- Targhee Sheep to be Awarded to Deserving Youth
- Sheep Inventory Numbers Released
- ASI Survey Results: Profile of the Average Sheep Producer in each ASI Region
- Equipment to Make Wool Washable in United States
- Jarvis Elected to ASI Executive Board
- 2010 ASI Council and Committee Members
- Wool Market Promises Higher Annual Prices
- Prince Charles Says Buy More Wool
- U.S. Sheep Shearing Team Announced
- ASI Meets with USDA Secretary
- ASI Survey Results: Revenue Needed for Sheep Producers to Expand Flocks
- SVC to Bring Washable Wool Processing Equipment to U.S.
- Young Producer Uses Out-of-Box Marketing Techniques
- U.S. Wool Market Up Sharply in Late March Sales

- American Sheep Industry Association Video Contest Announced
- Pipestone Lamb and Wool Facility Tour
- USDA Officials Address Multiple Sheep Topics
- Wool an Option for Oil Spill Clean Up
- ASI Survey Results: Predation and Livestock Protection Dogs
- Faribault Mills for Sale, Looking for Buyer
- U.S. Wool Market 47 Percent High Year-on-Year
- IWTO Congress Held in Paris
- Sheep Death Loss Report Released by USDA
- NSIP and LAMBPLAN Finalize Agreement
- Wisconsin Textile Businesses Share History, Provide Industry Support
- Wool Market at 20-Year High
- Move over Shrek
- Leftover Wool Impacts Lives of Newborns
- Camo Connoisseur Makes You Look like Nothing
- Snyder Wins Sheep Industry Scholarship
- Replacement Sheep Report on ASI Web Site
- A Tradition of Sheep
- Wool Foundation Officers Elected
- KentWool Golf Socks Worn by Bubba Watson during PGA Win
- ASI Scheduled for RFD-TV LIVE on Sept. 13
- Oregon Sheep Company: A Success for more than a Century
- From Feathers to Wool: Ohio Farm Re-Invents Itself as Sheep Operation
- Campbell/Hansmire Ranch: Not Just Producing Sheep
- ASI Hosts International Wool Buyers; Both New and Existing Clients
- Wool Market Slowed, but Demand Holds
- Wool Producers Directory Now Available

The *Sheep Industry News* is accessible from the home page of ASI's industry/consumer website, [www.sheepusa.org](http://www.sheepusa.org), as well as from its own site, [www.sheepindustrynews.org](http://www.sheepindustrynews.org). All the information published in the hard copy of the *Sheep Industry News* is also available to a much wider audience through this medium.

### **ASI Weekly Newsletter**

ASI produced 49 issues of the *ASI Weekly* newsletter. This newsletter contains a wide variety of articles of interest to the wool and sheep industries, including developments in the United States and worldwide market information for the wool and textile industries. The publication updates producers about the availability of wool programs coordinated by the U.S. Department of Agriculture (USDA). It also provides updates on Wool Trust Fund programs and how they benefit the wool and sheep industries. *ASI Weekly* is distributed to more than 5,000 producer and industry affiliates via e-mail and is also accessible from ASI's industry/consumer website, [www.sheepusa.org](http://www.sheepusa.org).

*ASI Weekly* is the industry's most timely publication in that information is dispersed in the same week it occurs.

## **Press Releases**

Press releases are an important way for the industry to communicate with multiple media outlets. The program included the distribution of press releases on a variety of topics, including those related to the wool industry and to the proceedings at the annual wool convention. Multiple lists are used in an effort to get the widest distribution of sheep industry news. A broad national media list is utilized as well as a listing of industry specific publications and the distribution to the administrative group maintained by the ASI office.

Press releases this year included the announcement of the installation of the wool superwash equipment, a report of the events from the annual industry-wide convention, the recognition of industry award winners including the wool excellence awards, announcements of newly elected board members and the annual scholarship winner, to name a few.

## **Media Coverage/Public Relations**

- **Radio Spots**

An annual event that ASI participates in is the National Association of Farm Broadcasters convention. Through this event, many radio spots concerning the issues relevant to the sheep industry are taped and utilized throughout the year across all U.S. markets. At the 2009 annual meeting, ASI recorded more than 20 radio interviews.

ASI also continued its outreach in 2009-2010 to use more regionally based radio to provide coverage on the programs vital to the industry. An effort to build relationships with the broadcasters resulted in more complete coverage of the wool and lamb industries. These radio spots were heard monthly in multiple regions of the United States.

- **Ag Week Participation**

National Ag Week is a time to celebrate American agriculture and honor the people who work within this diverse and vast industry. ASI joined the many other agricultural groups in educating Americans about how food, fuel and fiber products are produced and about the essential role agriculture plays in maintaining a strong economy. Supporting National Ag Week helps to provide tools for National Ag Day celebrations across the country. Large and small, urban and rural, this program has been commemorating the important role of America's producers and agriculture for more than 35 years.

- **Print Media**

ASI did extensive outreach to the print media this year and worked to build a stronger relationship with industry-specific publications as well as sheep-heavy regional publications. Getting the wool and sheep industry story out to the country and to the nation is an important step in maintaining the infrastructure of this industry. With the increased visibility of ASI, each year, more and more reporters contact the office for information ranging from story background or history to modern trends, as well as to get industry perspectives and quotes.

Throughout the year, ASI monitors the pick-up of industry stories. Several publications re-print articles about the industry and the programs important to wool and sheep.

- **Social Media**

To more efficiently communicate with members and the media, ASI created a Twitter account and Facebook page. These mediums allow for two-way communication providing sheep industry members a way to directly interact with ASI. It is also a tool for producers to interact with each other. ASI's Facebook page is at [www.facebook.com/home.php?#!/pages/American-Sheep-Industry-Association/373450956856](http://www.facebook.com/home.php?#!/pages/American-Sheep-Industry-Association/373450956856) and the Twitter page is at [www.twitter.com/sheepusa](http://www.twitter.com/sheepusa).

- **“Day in the Life as a Shepherd” Video Contest**

ASI hosted a video competition to provide its members an opportunity to share their story about their sheep operation. Contestants were asked to portray their “Day in the Life as a Shepherd,” which showcased their best sheep production practices celebrating their family’s heritage and tradition. ASI wanted to see how its members produced safe, environmentally friendly meat and wool. The winner of the video contest was Scott Oswalt of Michigan. His winning entry was available for viewing on ASI’s Facebook page.

- **Membership Survey**

In late 2009, ASI conducted a survey of its membership. The survey was conducted in an attempt to gather more information on sheep producers’ plans and industry input for ways to strengthen numbers. In addition, ASI was seeking information on expansion efforts and factors affecting expansion decisions based on producers’ location and size of flock. Out of the 7,394 surveys that were distributed, there were 1,858 producer responses after selecting only those surveys that were complete and whose participants filled in their state of residency.

The survey is divided into sections: Part I. Individual Sheep Production Information, including source of sheep industry news; Part II. Sheep Industry Expansion, including marketing of lamb and wool and predator management; and Part III. Farm/Ranch Purchases, which includes questions about care and health of flocks.

The results were collected and formulated into articles that were published in the *Sheep Industry News*.

The first provided a profile of the average sheep producer in each of ASI’s regions. The second article depicted industry expansion indicators, the factors affecting expansion decisions, what is needed for flock expansion and the means by which to improve producers’ profitability. The third article relayed information from the predation and livestock protection dogs section. ASI included this section in the survey to gain a better understanding of how sheep producers deal with predation and to gain more information on the effectiveness of livestock protection dogs protecting sheep against predators.

The complete results of the survey can be found at [www.sheepusa.org](http://www.sheepusa.org).

## **Printed Materials**

- **Brochures**

In FY 2009-2010, ASI produced and revised a number of its industry brochures to inform

the wool and sheep industry about the success of its programs.

- **Fast Facts**

The one-page wool and lamb Fast Facts were revised to incorporate the most current information as reported by USDA. These five consumer-oriented informational pieces give the general public useful industry information. The current fact sheets are posted on the ASI website for wide accessibility.

- **State-Specific Newsletters and Presentations**

Also continued this year were industry newsletters geared toward each state association. ASI produced a state specific, low-cost, two-page newsletter designed to be utilized at state association meetings to inform producers in that state of the current wool and lamb programs and the benefits received by producers in that state. These state-specific newsletters were individually produced for more than 40 states. PowerPoint presentations were also produced to address the topics that most affect each state. ASI annual highlights and current issues were included in the presentation.

- **Material Distribution**

ASI continued to disseminate educational materials to industry groups. Groups that requested information ranged from state and breed associations to youth groups, such as school programs and FFA and 4-H groups. Materials sent included the *Sheep Reporter*, wool and lamb Fast Facts, wool information packets and state-specific program brochures.

- **Convention Materials**

Convention materials were produced and distributed to support the convention's goal of bringing wool industry leaders together to define strategies to strengthen U.S. wool competitiveness. Comprehensive preparation is completed prior to the annual convention to provide attendees with the most current information and data as it relates to the specific areas of the industry affected by each council and committee.

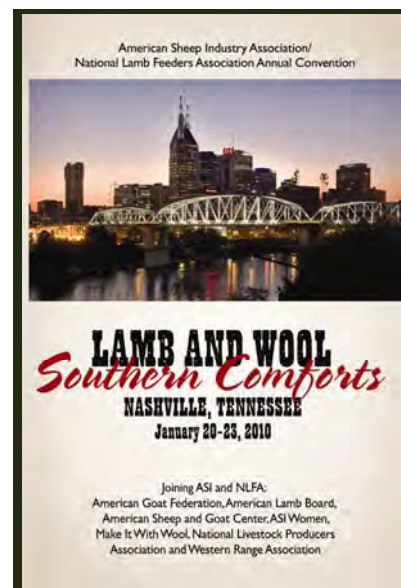
- **Displays**

A new display to be taken to various tradeshows and industry meetings was created this year. The display depicts the multiple aspects of the industry and provides a great visual for meeting attendees.

## Annual Wool Convention

Each year, an annual convention is organized to bring sheep industry leaders together to discuss industry issues, elect leadership and create/modify the policies that serve as the foundation for ASI and the American Wool Council (AWC).

Also, a major part of the convention is the opportunity for producers to hear from guest speakers about relevant topics to the industry as well as a chance to tour industry-related sites in



the area where the convention is being held. Workshop opportunities exist for producers to stay current on programs. Council and committee meetings are scheduled for producers to attend and learn more about specific areas of the industry, and the board of directors holds its annual business meeting during this event.

More than 425 sheep producers, feeders and affiliated businesses from across the nation gathered in Nashville, Tenn., to celebrate *Lamb and Wool – Southern Comforts*. The annual meeting included participants from wool suppliers and distributors to lamb feeders and producers, all interacting and working to improve the industry. Attendance once again surpassed that of the previous year as multiple sectors of the industry gathered during this event.

Some of the information coming out of the 2010 ASI Annual Convention included:

- The sheep industry demonstrated a unified front with participation from seven national associations including ASI, the National Lamb Feeders Association, the American Lamb Board, the American Sheep and Goat Center, the Western Range Association and the National Livestock Producers Association along with ASI Women and the National Make It With Wool contestants.
- The trade show has become a welcome addition to the convention. It gave attendees an opportunity to learn about new programs and products available to them. Displays arranged from pharmaceutical and animal identification companies to breed associations. Grazing land programs as well as USDA were represented.
- The research symposium was continued for a second year. Seven researchers from universities across the country had the opportunity to present research findings and interact with the very producers who utilize the information. Control of parasitic worms, residual feed intake and growth, effects of long-term targeted grazing, a comparison of U.S. sheep to Australian sheep and lamb production comparisons were just a few of the topics discussed at this half-day event.
- An orientation for new voting directors was implemented during this conference. Giving directors a better understanding of their role, and offering a big-picture view of the industry to bring them current with all of the topics and programs, makes them a better and more-informed participant in the meetings.
- The year began with stronger markets for lamb and wool with cull-ewe prices the highest seen in years, wool markets are expected to be active, pelt prices were up and lamb meat export numbers are strikingly higher indicating additional interest being shown around the world for U.S. lamb products.
- In an effort to quantify the non-traditional lamb market in the United States, it became apparent that sheep inventory numbers may be larger than previously reported by the USDA's National Agriculture Statistics Service. In 2008, as many as 1.2 million head of sheep were channeled outside the traditional pipeline and into ethnic markets, specialty and regional markets or were sold direct to consumers off the farm. Therefore, a portion of American lambs do not show up in the federally inspected slaughter numbers, and it is also likely that many ewe flocks are not accounted for in national reports. The actual number of lambs processed in this country could be as high as 3.5 million.

- USDA's Marketing and Regulatory Programs Under Secretary Edward Avalos offered uplifting comments from the department regarding support of the agencies for the sheep industry, specifically mentioning the predator control and scrapie eradication programs. He voiced support for renewing mandatory price reporting for livestock, mentioned the implementation of the new sheep center and relayed his thought that USDA's push to revitalize local food production is a fit for the sheep industry.
- It was stressed that wool prices are inventory driven but that demand is having an effect as well. Some of the drivers of falling wool production include climatic conditions, lower wool-income returns compared with other enterprises, a shift to raising sheep for meat production, predators and pessimism about wool. It was expected that there will be better consumer demand for natural fibers in 2010 and that the tight supply of apparel wool - with little prospect to increase the supply - will have an effect.
- A 2010 budget amendment approved by the BOD facilitated one of the most significant advancements in wool product development in the United States in years. ASI introduced equipment in the United States to manufacture washable/shrink proof wool products. It was relayed that the AWC found the equipment, the textile industry supported the investment and the company agreed to facilitate this process being operational in 2010.
- Livestock protection dogs (LPD) have long been used to protect sheep from predation. With increasing growth and development in rural areas and added recreational use of federal lands, conflict between these animals and non-agricultural residents can be more frequent. ASI's LPD working group presented a set of suggested management guidelines to help producers avoid conflicts due to protection dogs. Core areas of the program include the legal aspects of LPD ownership, health management, LPD training and management, herder education, agency cooperation and public relations.
- "With Vision, There is Hope" was the message brought to participants by Bruce Vincent, a third-generation logger from Montana, who spoke about the conflicts arising between production agriculture and conservation groups. There is need for a new movement to save the business and culture of rural America. There's a way to save the last best places, but we're going to have to save the last best people to do it. Vincent said it is the people who work with and manage the land - loggers, miners, agricultural producers - who know how to preserve that land. But the message put forth by environmental activists today is that harvesting resources - by loggers, miners and agricultural producers - is damaging that land. The new environmental movements must be lead by rural people.
- The details of the new disaster assistance program were communicated. The program compensates livestock producers for losses related to adverse weather. Millions of dollars in payments were made to sheep producers from Texas to North Dakota due to blizzards and spring storms that killed sheep in 2008 and 2009.
- Two members of the U.S. wool industry were recognized for their years of service during the Wool Excellence Awards lunch. This award was developed to recognize those that have made a lasting impact on the U.S. wool industry and paved the way for those in the wool industry today.

**Web Site: [www.sheepusa.org](http://www.sheepusa.org)**

The ASI website continues to be the conduit for state associations, wholesalers, producers, consumers and the media to gather information about the wool, pelt and lamb industries. It remains a goal of ASI to keep the site a vital source of industry information.

As part of the constant updates that are being done to keep the site current, a new online course was launched in the 2009-2010 fiscal year. The Sheep Safety and Quality Assurance course that has historically only been taught in classroom sessions is being converted into an online educational course.

**Web Site: [www.sheepindustrynews.org](http://www.sheepindustrynews.org)**

The *Sheep Industry News* website that was designed in the 2006/2007 fiscal year has had a positive impact on the distribution of industry information. Each month, the new edition of the *Sheep Industry News* is posted to this site allowing for more-expanded coverage of the material that is important to wool, pelts and lamb.

This easy-to-navigate site allows visitors a way to view the top stories and pictures for each edition. Visitors are able to navigate between this site and the [www.sheepusa.org](http://www.sheepusa.org) site with ease.

## Digitization of *The Wool Grower Magazine*

In 1865, the National Wool Growers Association was formed. From its inception, one of the major goals of the association was that of communication. After several attempts to make this goal a reality, in March 1911, the first *National Wool Grower* magazine rolled off the press. This monthly publication continued through February 1997.

The *National Wool Grower* covers 86 years of sheep industry history - history that is currently only available in hardcopy format and, as time progresses, continues to deteriorate.

It was recommended that as many as possible of these 1,020 editions of the publication be converted from their current paper version into an electronic format in an effort to preserve the past.

The final editions of the *National Wool Grower* were scanned in this fiscal year. Bookmarking and getting them prepared for distribution is nearly complete and will be done in the next fiscal year. The final product will be a full set of the *National Wool Grower* magazines available on a CD. ASI is well on its way to achieving this goal but will continue the necessary work to accomplish it in the next fiscal year.

18 THE NATIONAL WOOL GROWER January, 1921

### Reports From All Around the Range Country

**CENTRAL WASHINGTON**  
Weather conditions in this section are very favorable for sheep. Some sheep are on feed, but some are still on the range. Cotton cake meal and rolled barley form the chief feed, with a few using alfalfa. Most of the sheep came out of the mountains in good shape, although some were lost on the trail. There were good lamb crops here and some high percentages made. The grass was rather short in lambing time. Quite a few lambs were held here on account of the uncertainty of prices. Wool is being held in the warehouses in Portland and other places. None has been sold as yet. A few clips were sold early for 43 cents per pound, but most of the owners were holding for 50 cents, and the chances are they will take less than 43 cents. Some outfits have cut wages already; others are waiting until January 1st. The prospects are good for a big cut in expenses for running sheep. EDGAR R. CRAMMER, Wenatchee, Wash.

**SOUTHERN UTAH**  
The sheep went on to the winter ranges in good condition and have, up to this time, done exceptionally well. The growers all look for a nice crop of wool, and it should be in good condition, as the range has just enough snow to save trailing to water. We are, however, up against a real problem—shortage of money for expenses. We have no money to buy revenue stamps to put on our renewal notes. However, we are all hopeful and will continue until help comes. Live stock are all looking better than usual. THOS. SEVY, Panguitch, Utah.

**EASTERN MONTANA**  
We have had a fine fall and winter up to this date, with the stock in good condition. No hay has been fed to range stock up to this date (December 23rd).

There is a lot of hay for sale, but little is being sold. Ten dollars is the price asked for the same kind of hay that brought \$30 per ton last winter. A good many lambs have been shipped out, bringing from 10 to 10½. The lambs were from five to ten pounds heavier this year. There are about 25,000 on feed in this locality and most of them are contracted at 12½ cents. I have 2,200 on feed. I think we will have to take a loss on them this year. Most people are looking for an improvement

As the ranchers fed these lambs on contract, receiving them at eight cents and weighing them back at ten, they have made some money, but the contractors who put them out, are taking a heavy loss. E. R. McCLURE.

**HAY AND WAGES IN EASTERN OREGON**  
Since the present troubles of sheepmen are not confined to localities, but are issues which call for Congressional



International Champion Bushkill Ram, a son of Ohio Premier, Bred and Shown by Oth & Matthews McGuffey, Ohio

in conditions after the New Year. Let's hope it comes. CLEVELAND WALLACE, Big Timber, Mont.

**FEW IDAHO LAMBS ON FEED**  
Rather less than the usual number of lambs were fed on the southern Idaho projects this season, due solely to inability to procure money for operating. The feed was plentiful and easily twice as many could have been fed. Good gains were made, probably an average of twelve pounds per lamb.

legislation and are nation-wide in their scope, it is rather difficult for a new stock owner with a plant in the secluded ranges of eastern Oregon to break into the columns of a publication which has as readers other stockmen and woolgrowers. But presupposing that existing conditions in this section will be of interest to other shepherds, the writer will side-track the remedial legislation questions and make a brief report on the local situation. Naturally when a blanket of snow covers the hills and only a few trees stubble of bunchgrass protrude above the

An industry update report in the January, 1921, *National Wool Grower*.



## **Appendices**

Samples of *Sheep Industry News*

Samples of *ASI Weekly* newsletter\*

Copies of Newly Created and Updated Brochures and Flyers

-Wool and Lamb Fast Facts\*

Sample of State Association PowerPoint Presentation\* and Brochures (individually produced for more than 40 states)

ASI 2010 Convention Material

-Press releases\*

-*Sheep Industry News* report (March 2010 issue)\*

-Registration brochure



**Summary**

The U.S. wool industry is the driving force behind all Wool Trust-funded programs. Its input is essential in all planning and to ensure that programs work toward achievement of the three goals of the Wool Trust Act. Under the Wool Producer Planning program, industry representatives from all sectors helped create and oversee programs. This is an ongoing need, due to the evolving nature of strategic planning. This program ensures regular reassessment of the direction of all programs to evaluate whether results are being achieved and to refine efforts. This past year, wool producer planning ensured that the Wool Trust plan’s vision continued to reflect industry needs and capabilities and that the program continued to achieve measurable results.

**Project Description/Results**

The primary strength of ASI’s wool competitiveness program continues to be the synergy of the individual components – i.e., the fact that individual projects are strategically designed to work together to attain the goals of the Wool Trust. The fact that the United States has been successful in obtaining and maintaining new customers for its wool – and helping to make U.S. wool

more competitive against other foreign wool – speaks to the success of this approach.

Under this project, funds were used to cost-share strategic planning meetings that enabled ASI to review the appropriateness of its current strategic direction, given changing market conditions.

**Wool Trust Goal Addressed by This Project:**

- Development and promotion of the wool market
- Improve the quality of wool produced in the United States, including wool production methods
- Disseminate information on wool improvements to U.S. wool producers

**Project Goals**

- ✓ *Provide strategic direction to programs carried out under the Wool Trust*
- ✓ *Solicit input for programs to better meet industry needs*
- ✓ *Keep U.S. wool growers informed of program direction, development and results*

These included:

- ASI Board of Directors meeting
- Meetings of the executive board
- ASI officer travel
  
- Meetings of councils (such as the American Wool Council and Wool Foundation Board), committees and task forces
- Volunteer travel

## **Recommendations**

Strategic planning is perhaps the most important part of any major industry initiative. Only a well-planned strategy will be able to bring the results that are hoped for under the Wool Trust. Thus, wool producer planning needs to remain part of the overall program package.

## **Appendices**

Wool Council Minutes  
Program Update for Wool Council



## Wool Strategies and Business Development

### Summary

The basis of solid strategic planning is information. A clear and objective understanding of where the U.S. wool industry is now, what its strengths are and what areas need to be enhanced is a crucial requirement. Under this program, ASI initiated a comprehensive analysis and assessment of the needs of the U.S. wool industry heading into 2010 and beyond. This is expected to aid in the development of future programs that will improve U.S. wool's competitiveness.

### Project Description/Results

The U.S. wool industry has changed dramatically over the past decade, with huge shifts in the production level, service industries and customer base. For instance, the U.S. wool processing industry has shrunk, and the continued closing of U.S. textile mills has caused the U.S. industry to lose most of its prior customer base.

To ensure that the U.S. industry is equipped to face the challenges of the future, ASI introduced the wool strategies and business development program years ago. The objective of this program was first to identify in the current U.S. wool system, competitiveness and create long-term viability for a challenged industry.

weaknesses that will hold it back from achieving its full potential or strengths that could serve as a springboard to overcome the challenges it faces. Armed with this information, the program's objective is to identify services or businesses that ASI could invest in to improve the U.S. industry

### Wool Trust Goal Addressed by This Project:

Development and promotion of the wool market

Improve the quality of wool produced in the United States, including wool production methods

Disseminate information on wool improvements to U.S. wool producers

### Project Goals

- ✓ *Provide comprehensive direction for the future of American wool production, marketing and quality improvement*
- ✓ *Assess additional needs in the wool industry*
- ✓ *Coordinate with the rapidly changing domestic and international textile sector, wool producers and handlers*

For the last number of years, this program focused on research and needs assessment.

ASI formed various committees, which met to analyze and review the current state of the industry – assessing the strengths and weaknesses of current U.S. production practices, processing capabilities and marketing methods. The groups heavily utilized information from other aspects of Wool Trust programming, such as information gathered while making decisions on New Technology investments. The primary result of this initial stage has been the identification of holes in the processing area and in the marketing area. The next step will be to analyze whether ASI can develop programs to address these holes. As part of this, ASI developed a strategic plan.

### Projects from Wool Strategies and Business Planning

- **RFD-TV LIVE Show**

RFD-TV is home to the most comprehensive line-up of agriculture-based programs ever assembled on one channel. Shows from around the world give agriculture professionals and hobbyists the widest variety of news and information available to fit every interest and operation. RFD-TV LIVE – the network's longest running RFD-TV produced program – gives viewers the opportunity to spend quality time with each week's featured expert panel. Members of ASI were the featured panel on the Monday, Sept. 13, 2010, show.

ASI leadership selected representatives to make up the expert panel and discussed sheep industry-related topics with the show's host, Mark Oppold. In addition, the expert panel fielded phone calls and questions from the live television audience watching at home. This program provided ASI with direct interaction between the show's guests and our members and those interested in raising lamb and wool.

A variety of sheep industry issues were covered, but the highlights included a recap of the highs the industry has experienced in both the lamb and wool markets, the increased demand of lamb due to emerging markets, the benefits and ease of adding sheep to already existing agriculture enterprises, resources for new producers looking to get into the industry and the array of industry information that can be found at [www.sheepusa.org](http://www.sheepusa.org). In addition, the audience viewed sheep producer documentaries from various producers across the country (California, Iowa and Ohio) depicting the success they have had in the industry and to portray the various methods in which to raise sheep. These documentaries were filmed and produced by ASI staff and are available for viewing on ASI's Facebook page or at [www.sheepusa.org](http://www.sheepusa.org).

The Nielsen rating numbers from ASI's LIVE show were extremely positive. Most LIVE shows range from 20,000 viewers to 70,000



RFD-TV Live host Mark Oppold sits with ASI staff, executive board and industry leaders to discuss the sheep industry.

viewers depending on the subject at hand, the ASI LIVE show was viewed by 93,000 households and 118,000 adults age 18 and older.

## **Recommendations**

Like the Wool Producer Planning Program, it serves a crucial function for ensuring that any programs adopted under the Wool Trust Fund are the result of careful strategic planning. Strategic planning is the key to obtaining the best possible results from investments. This program, however, carries strategic planning a step further by looking at the long-term survival potential of the industry and determining key ways to enhance the industry's survival. It is recommended to retain this program for the upcoming year and to move the program into the next step of identifying what role ASI can play in shoring up holes in the current wool production and marketing chain.

## **Appendices**

ASI Long Range Strategic Plan 2004-2010

RFD-TV LIVE segments featuring ASI: <http://www.facebook.com/#!/pages/American-Sheep-Industry-Association/373450956856?sk=wall>



**Summary**

The American Wool Foundation is a non-profit organization that manages the Wool Trust Funds, ensuring accountability and program appropriateness. The American Wool Foundation makes sure all of the authorized funds are delivered for programs on behalf of U.S. wool producers and that producers will fully reap the benefits intended by the Wool Trust Act. Its oversight ensures that programs adhere to federal regulations and that program results are commensurate with program investments.

- The establishment of a foundation isolates and identifies the organization responsible for implementing the program.
- It also isolates the accounting function for the funds.
- It allows a wool organization to manage the Wool Trust program.

**Project Description/Results**

The Wool Foundation is the legal entity that manages the Wool Trust program. This ensures that trust funds are managed separately and also effectively. Thus, Wool Trust funds are allocated by the USDA's Agricultural Marketing Service (AMS) to ASI, which maintains a contract with AMS. ASI then obligates those funds to the Wool Trust Foundation, which contracts with ASI to carry out the programs. The oversight by the Foundation's Board of Directors, who are chosen for their ability to represent wool interests, helps to ensure U.S. wool interests are well served. Three key things are achieved with this:

**Wool Trust Goal Addressed by This Project:**

Development and promotion of the wool market

Improve the quality of wool produced in the United States, including wool production methods

Disseminate information on wool improvements to U.S. wool producers

**Project Goals**

- ✓ *Support Wool Trust programs by managing the funds and ensuring federal regulations are appropriately observed in ASI's programming*

## **Recommendations**

The recommendation is to continue to manage funds through this separate entity to allow for the most responsible use of the funds.





**Summary**

This covers the basic organizational costs necessary to carry out programs. Thanks to Wool Trust funding, ASI was able to maintain staff and appropriate resources to support all Wool Trust-funded programs.

**Project Description/Results**

Without this activity, none of the programs described in this report could have been carried out. ASI maintains a small, highly trained staff and a Denver office. Staff works hand-in-hand with industry leaders and others to develop the most effective strategies and plan and implement programs that best meet the goals of the Wool Trust Fund. Thus, the administrative infrastructure provides the base from which all the programs are launched.

It should be noted that ASI undergoes external audits by both the USDA’s Foreign Agricultural Service (FAS) and independent auditors. Monthly financial statements complete with all cash disbursements, time records and budget variance explanations are reviewed by USDA and the executive committee of ASI.

Independent auditors, as well as FAS, review management practices and internal

controls related to the financial statements and compliance with the laws, regulations and the provisions of contracts or grant agreements. Noncompliance could have a material effect on the financial statements in accordance with the *Government Auditing Standards (GAS)*. As well, there are internal controls related to major programs, negative assurances on lobbying activities and an opinion on compliance with laws, regulations and the provisions of contracts or agreements that could have a direct and material effect on each major program in

**Wool Trust Goal Addressed by This Project:**

- Development and promotion of the wool market
- Improve the quality of wool produced in the United States, including wool production methods
- Disseminate information on wool improvements to U.S. wool producers

**Project Goals**

- ✓ *Provide appropriate administrative support necessary to carry out programs to meet the goals of the Wool Trust Fund*

accordance with the Single Audit Act Amendments of 1996 and OMB Circular A-133, *Audits of States, Local Governments, and Non-Profit Organizations*.

## **Recommendations**

Administrative costs are an intrinsic aspect of program implementation. They provide the personnel and resources necessary to not only carry out activities but also to carry them out effectively.



\* Denotes Electronic File on Included CD

### **International Market Development**

ASI's Unified Export Strategy, October 2009 – September 2010\*  
ASI's Country Progress Report, October 2009 – September 2010  
(on file after 3/31/11)  
Report on U.S. Marketing Year Exports by Northwest Statistics\*  
Representative Trip Reports  
Evaluative Surveys by Reverse Trade Mission Participants  
American Wool Council Ad\*

### **Raw Wool Quality Improvement**

Wool Labeling Brochure  
Wool Micron Card  
National Western Stock Show Shearing Contest Results

### **Quality Assurance**

Copy of article in ASI's *Sheep Industry News* on Scrapie Eradication plan (November 2009 issue)\*  
Copy of LRP-Lamb article in ASI Weekly\*  
RMA/FCIC: LRP Summary Business Report\*  
Council for Agricultural Science and Technology (CAST): *Pasteurellosis Transmission Risks between Domestic and Wild Sheep*\*  
State Association Scrapie Eradication Reports

### **Wool Outreach**

Sample of Application for Wool Outreach Program\*  
Summary of all 10 Rounds of Wool Outreach Program\*

## **Producer Communication**

Samples of *Sheep Industry News*

Samples of *ASI Weekly* newsletter\*

Copies of Newly Created and Updated Brochures and Flyers

-Wool and Lamb Fast Facts\*

Sample of State Association PowerPoint Presentation\* and Brochures (individually produced for more than 40 states)

ASI 2010 Convention Material

-Press releases\*

-*Sheep Industry News* report (March 2010 issue)\*

-Registration brochure

## **Wool Producer Planning**

Wool Council Minutes\*

Program Update for Wool Council\*

## **Wool Strategies and Business Development**

ASI Long Range Strategic Plan 2004-2010\*

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