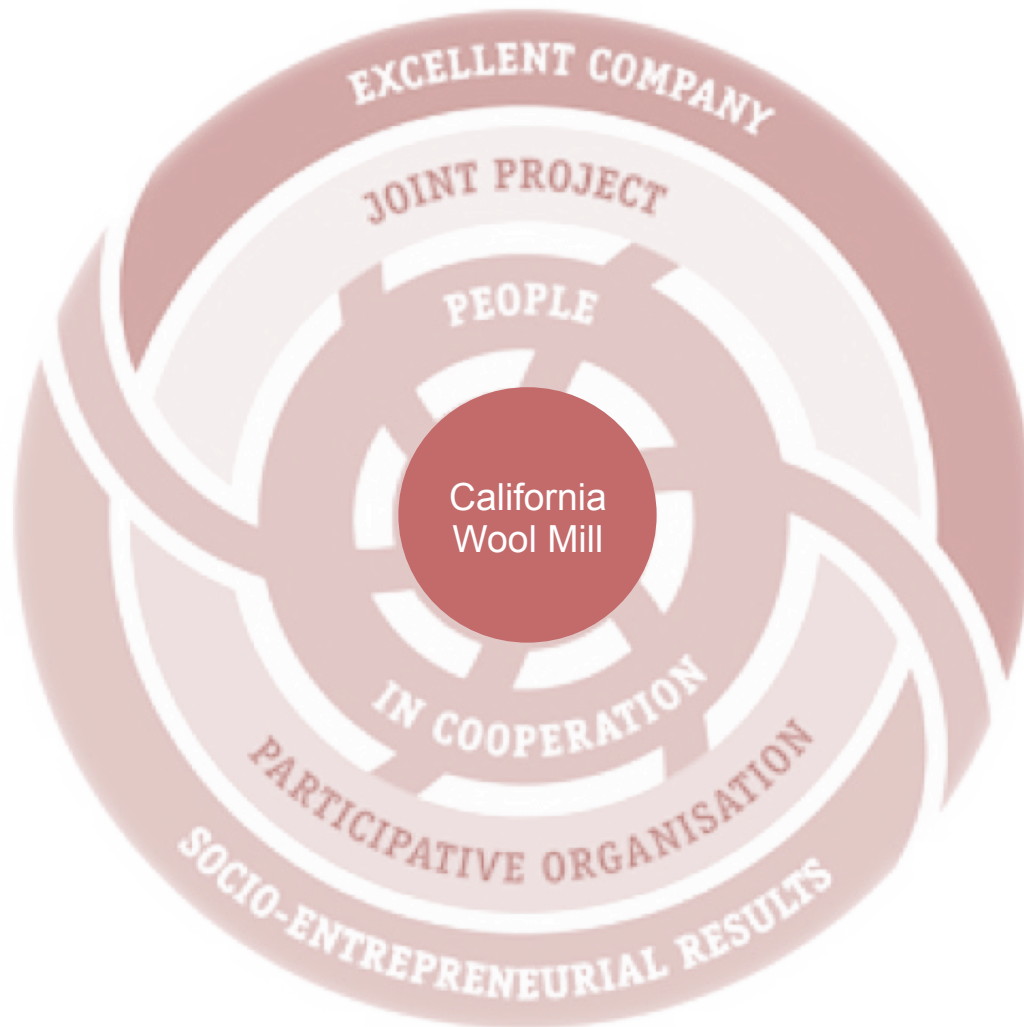


Sheep to Chic

The Business Case for a
Northern California
Wool Textile Mill



What will I talk about today?



Growing the local green economy

Supporting California sheep farmers

Creating real livelihood for women

Developing a sustainable textile supply chain

Why don't we use our own wool?

Shift to overseas
garment
manufacturing

Most US wool is
exported

Consumer awareness



US is largest
consumer of wool

How many sheep in the US?

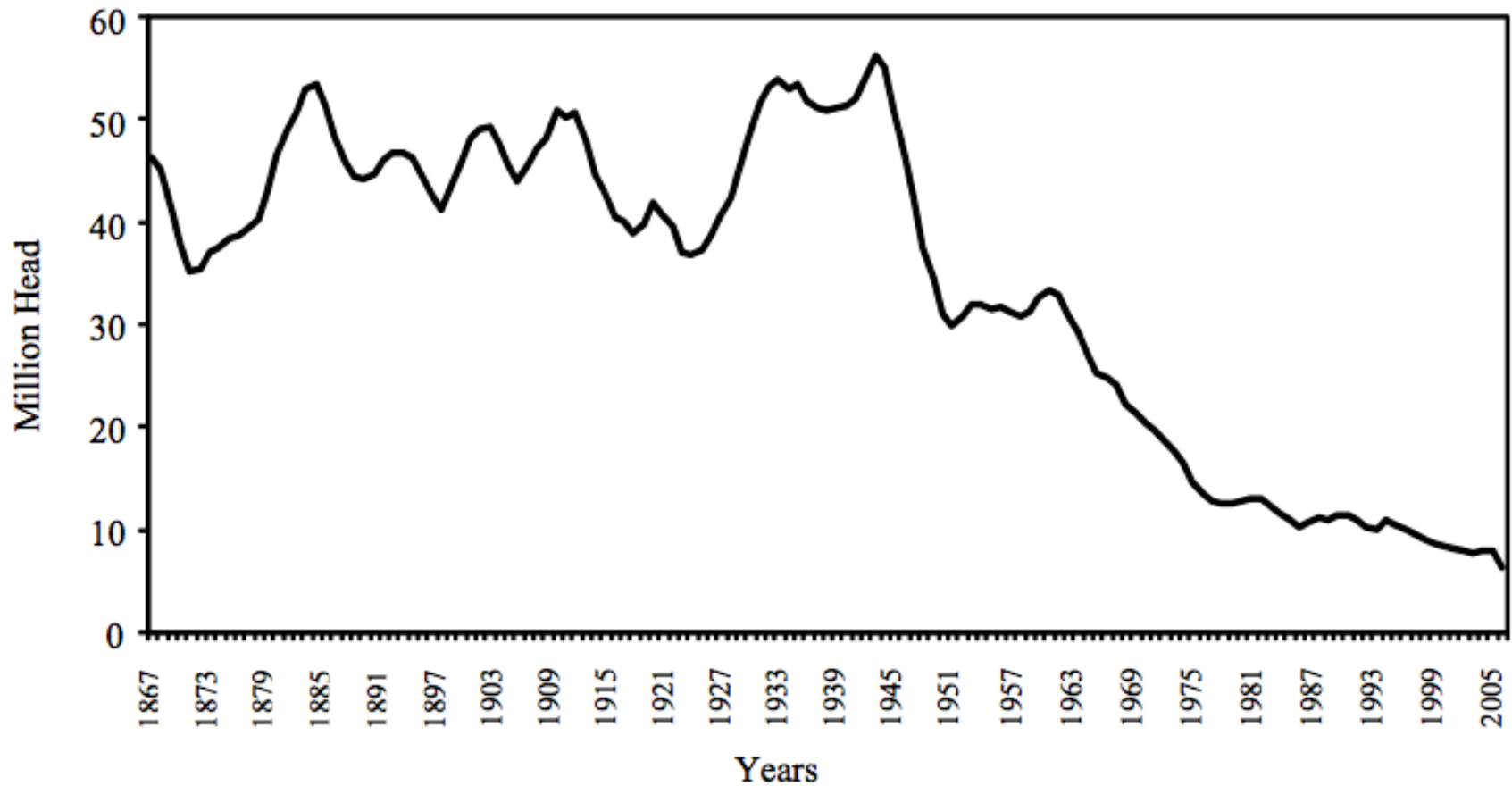


FIGURE 1-1 U.S. sheep and lamb inventories (January 1), 1867–2007

Source: USDA (2007b).

Why did wool volume decline?



Synthetic Fiber

Foreign subsidies

Meat packer
consolidation


US policy
changes

Predators

Why is New Zealand Successful?




**NEW ZEALAND WOOL CARPETS.
AVAILABLE IN OVER 600 COLORS
(INCLUDING WHITE).**



Carpets carrying the Wools of New Zealand brand can be found in literally hundreds of colors. That's because New Zealand sheep are reared in a pure, healthy environment which lends itself to dazzlingly white wool. And the whiter the wool the better it is at taking color.

For a free brochure call us at 1-800-367-0462 or visit us on the Internet at <http://web.www.com/nzwool>.



WOOLS
OF
NEW ZEALAND™

How is the US advertising wool?

New farmer campaign to increase flock population

LET'S GR^{WOOL}



American Sheep Industry Association

Your industry advocate since 1865.

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Hot Topic

[Rebuild the U.S. Sheep
Inventory](#)

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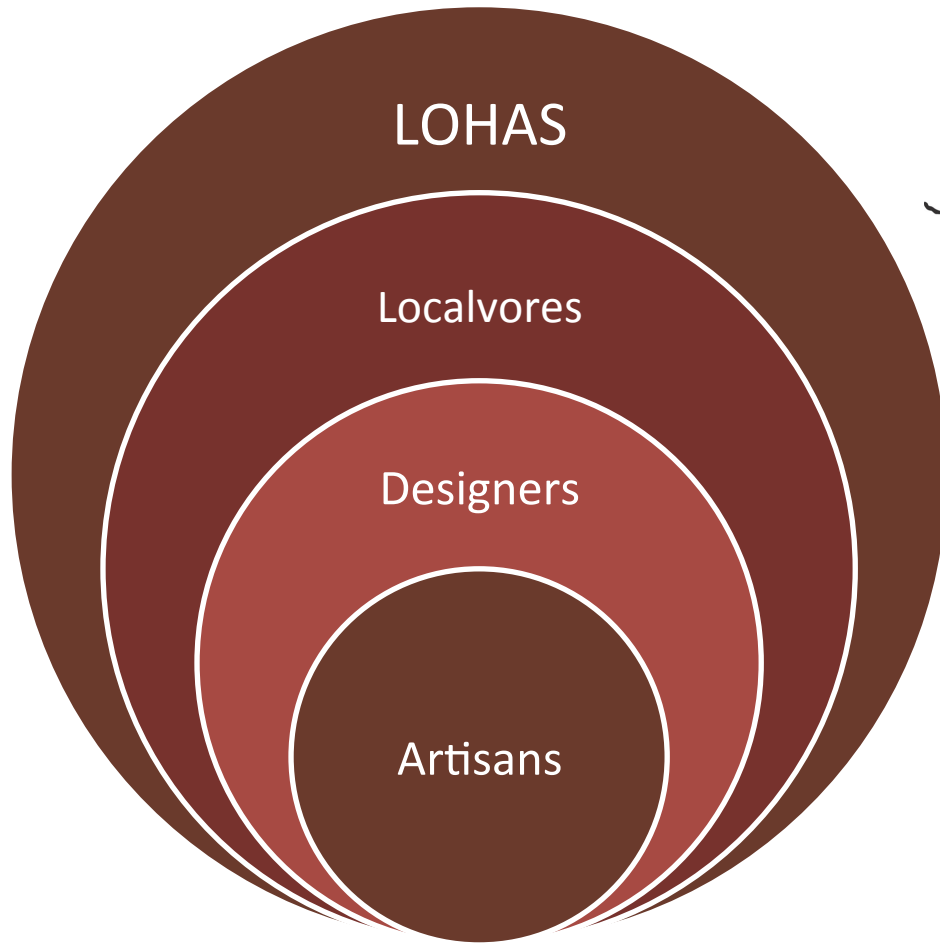
Research Journal

[2012 Research Journal](#)

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Who Wants US Wool?



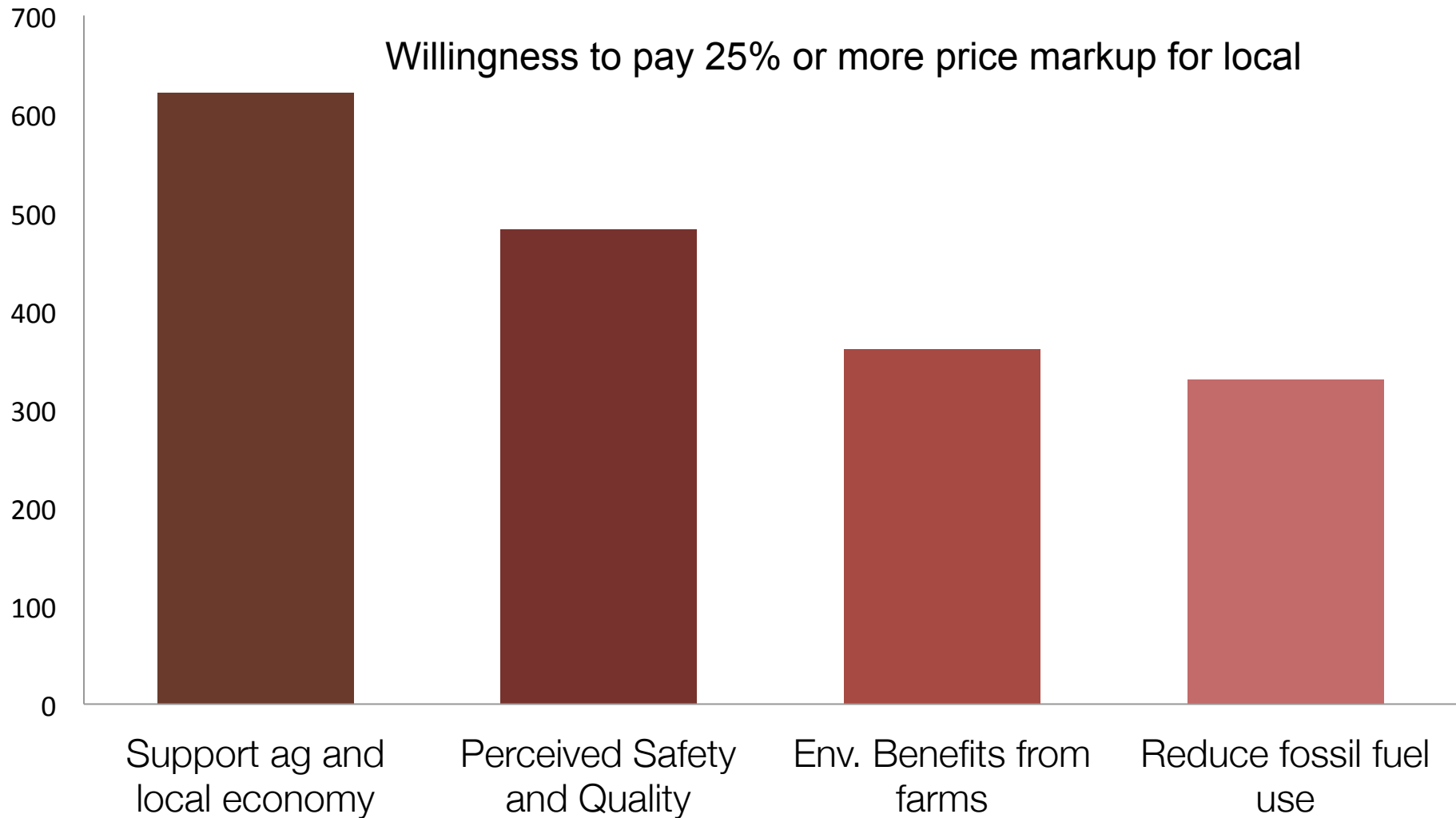
patagonia[®]

Timberland[®] 


INDIGENOUS

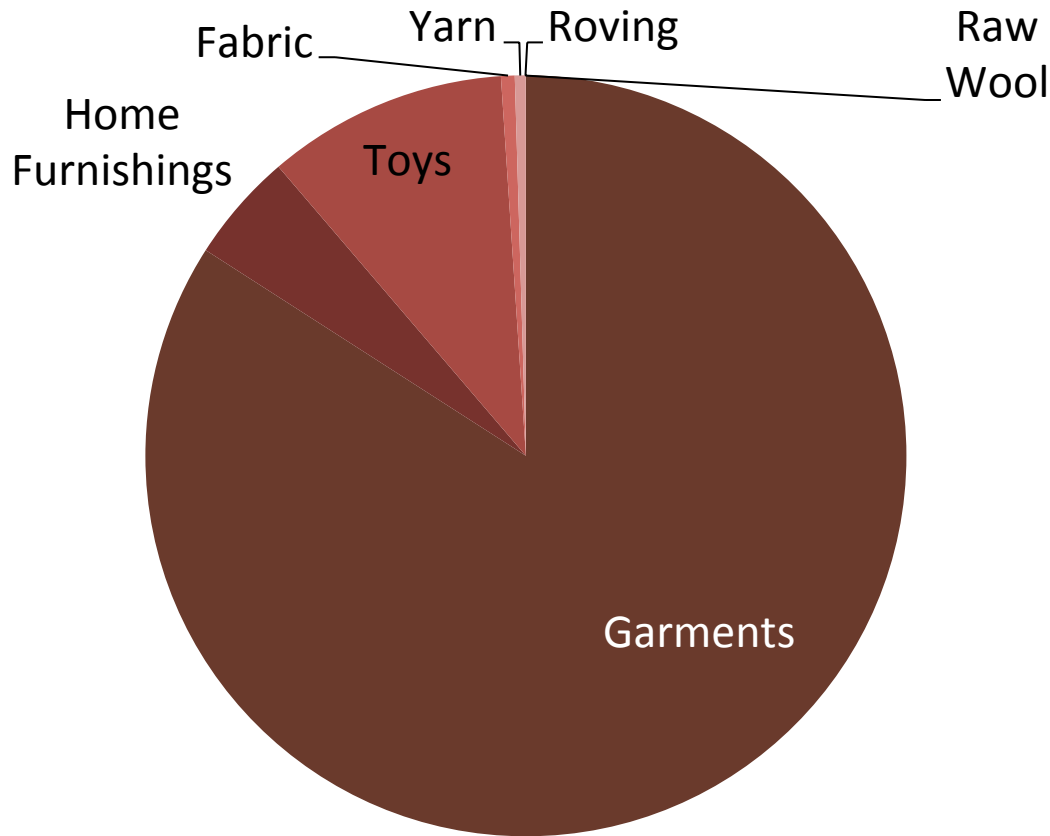
Women are 85% of Consumer Market

Why people want **local**?



Source: Iowa State University, Allan Ortiz 2010

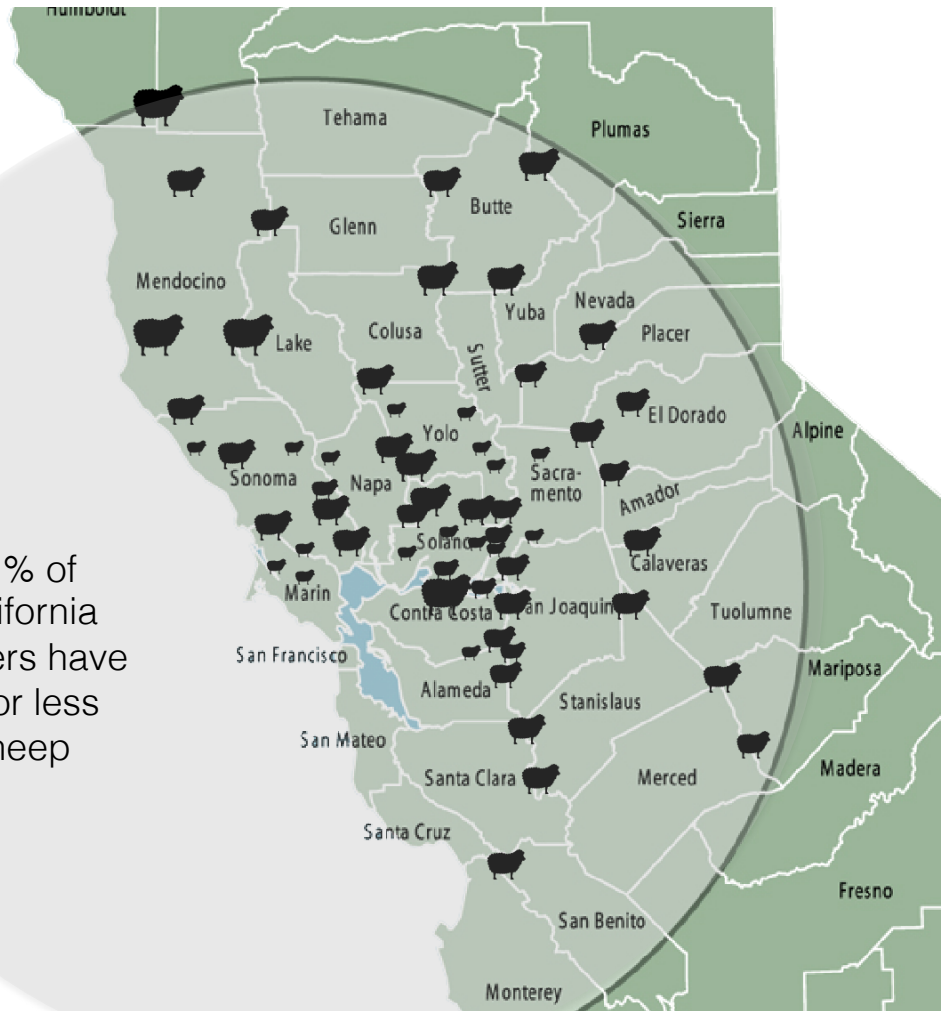
How do they want their wool?



Source: NAICS



Is there an opportunity here?



71% of
California
farmers have
24 or less
sheep

600,000+ sheep

3 million+ lbs of
wool

27.7% is 22
micron & finer

No fine grade
fiber processing
in CA

2007 USDA Census

Perhaps there's an opportunity?

LOHAS is now 30%
of total market

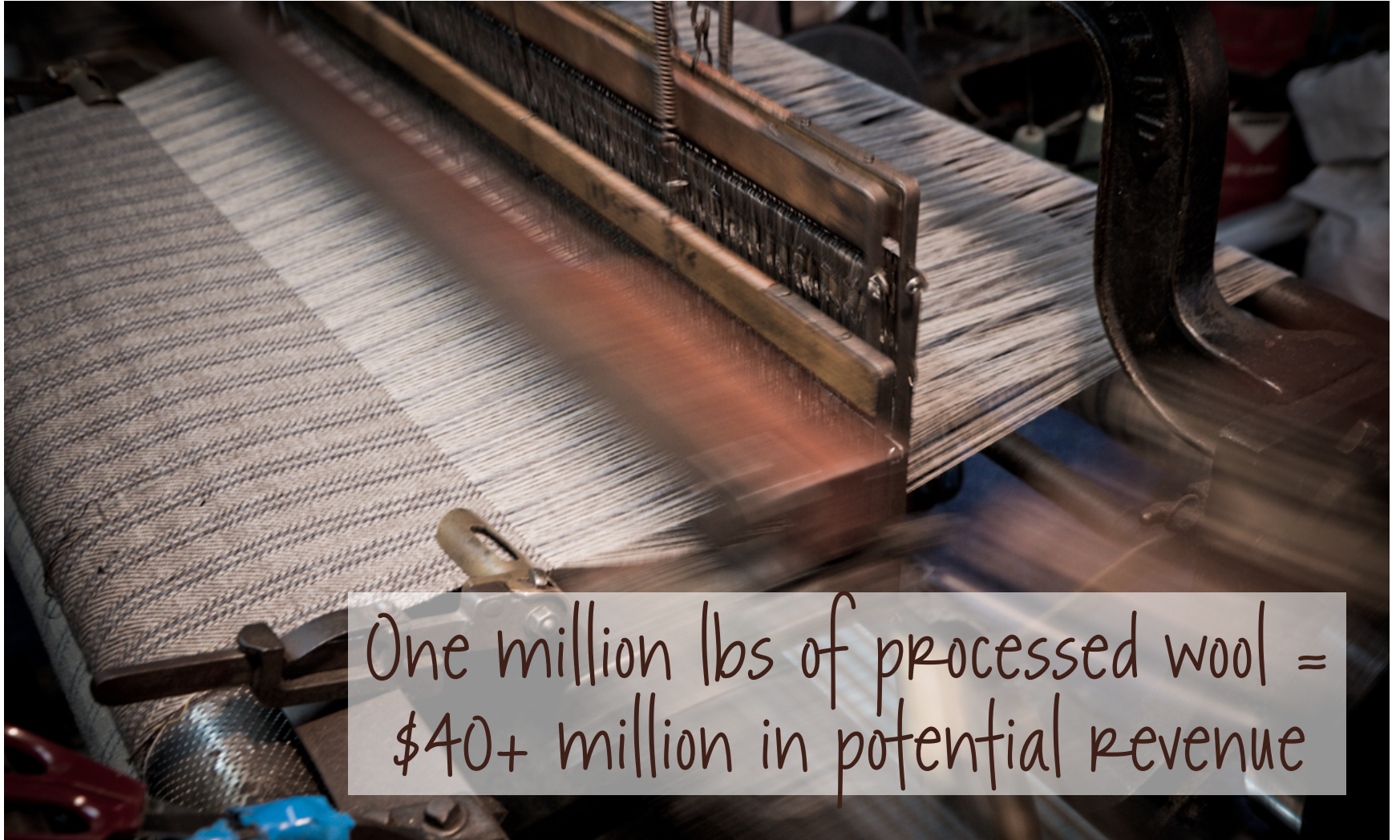
Localvores spend
\$4.8 billion on local

Increase in local cut
and sew operations

Increase in labor
prices abroad



What exactly is the opportunity?

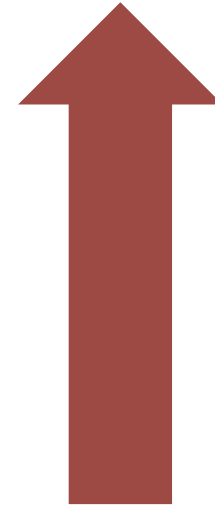


One million lbs of processed wool =
\$40+ million in potential revenue

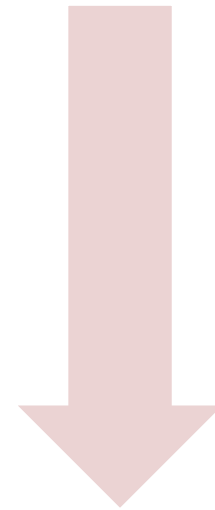
How should we brand it?



What products should we make?



How much
direct to
consumer?



How much
fabric for
designers?

What else could we make?



How should we sell it?

Retail

Online

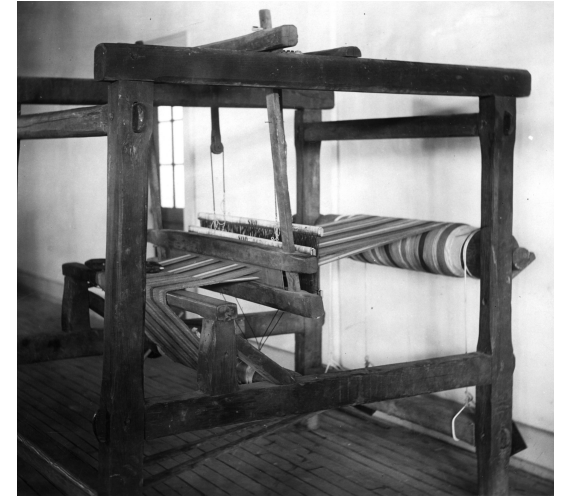
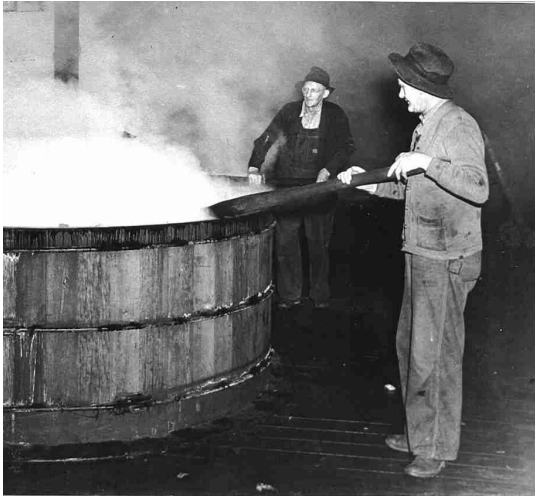
Wholesale

Partnerships

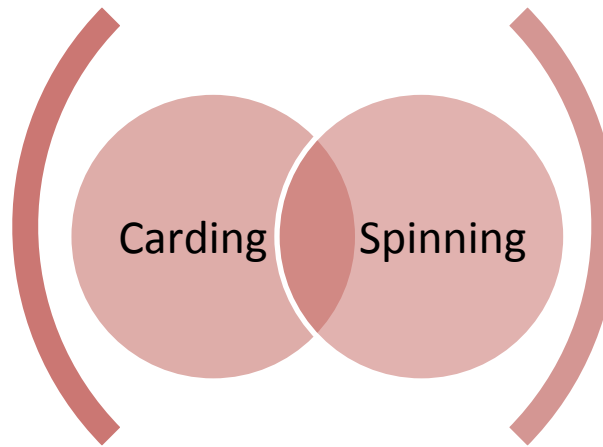


Women-focused
brand experience

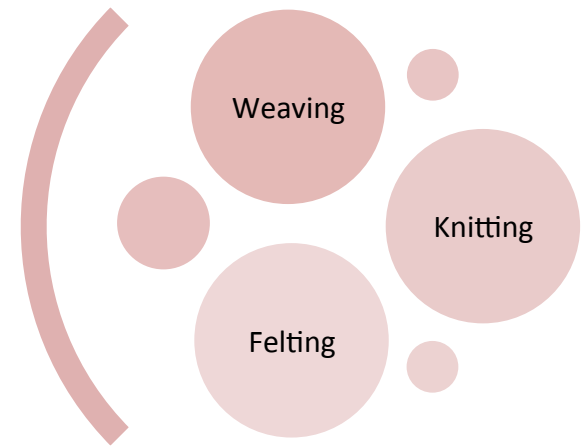
What infrastructure is needed?



Mobile

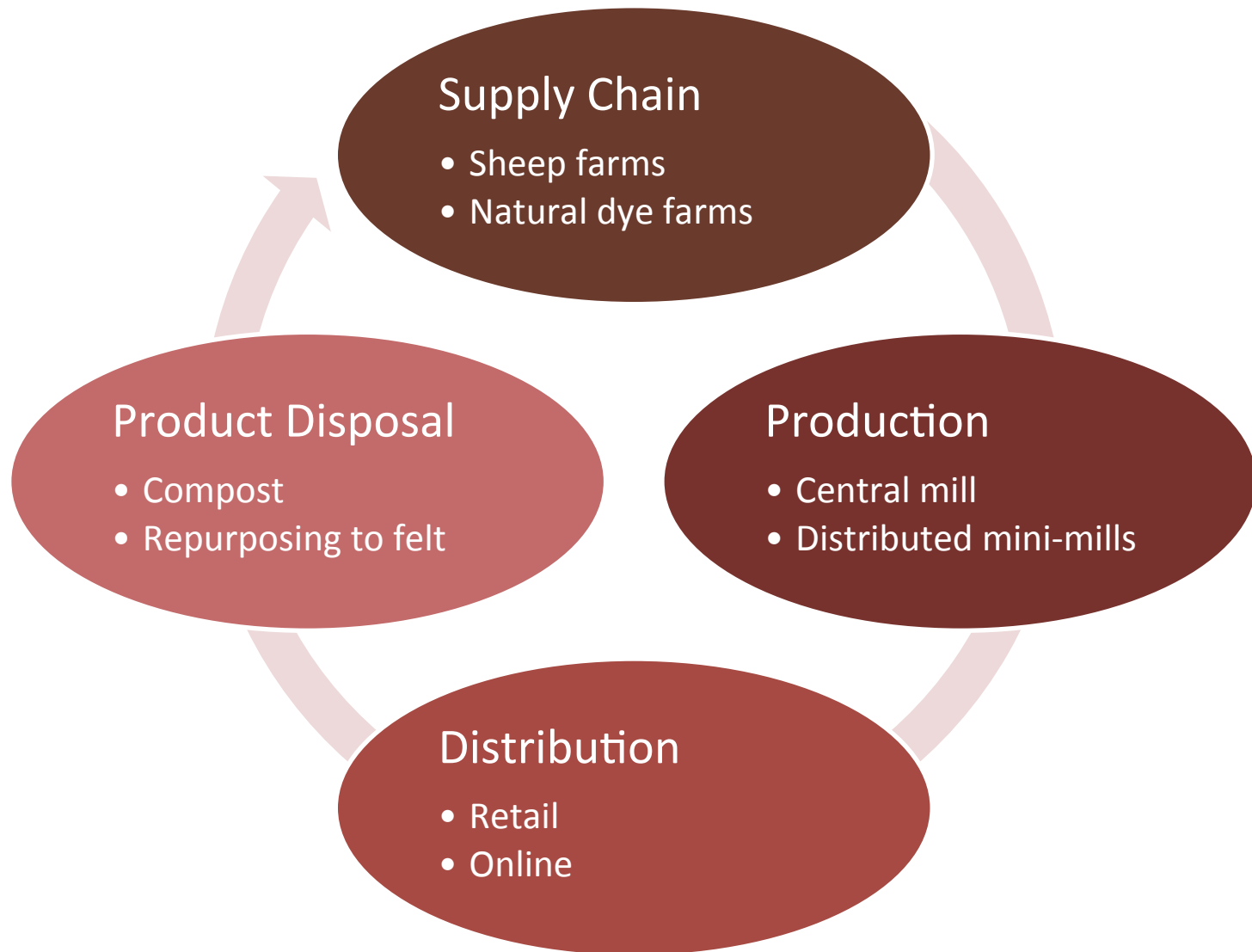


Central



Distributed

What is the material cycle?



What is the business structure?



44% of Coops
are still in
business after
10 yrs

Only 19% of
standard
corporations
survive 10 yrs

What would this look like?



Why is this so important?

Economic
opportunities for
mothers

Only 6% of
mothers in
poverty receive
public
assistance

25% of women
with infants live
in poverty

10 million
mothers are
underemployed

Enable women to
provide for their
children



What and who do we know?

Industry
experts

Designers
and artisans

Engineers

We have
tons of wool



What don't we know?

Quality of
wool supply

Distribution

Textile
demand

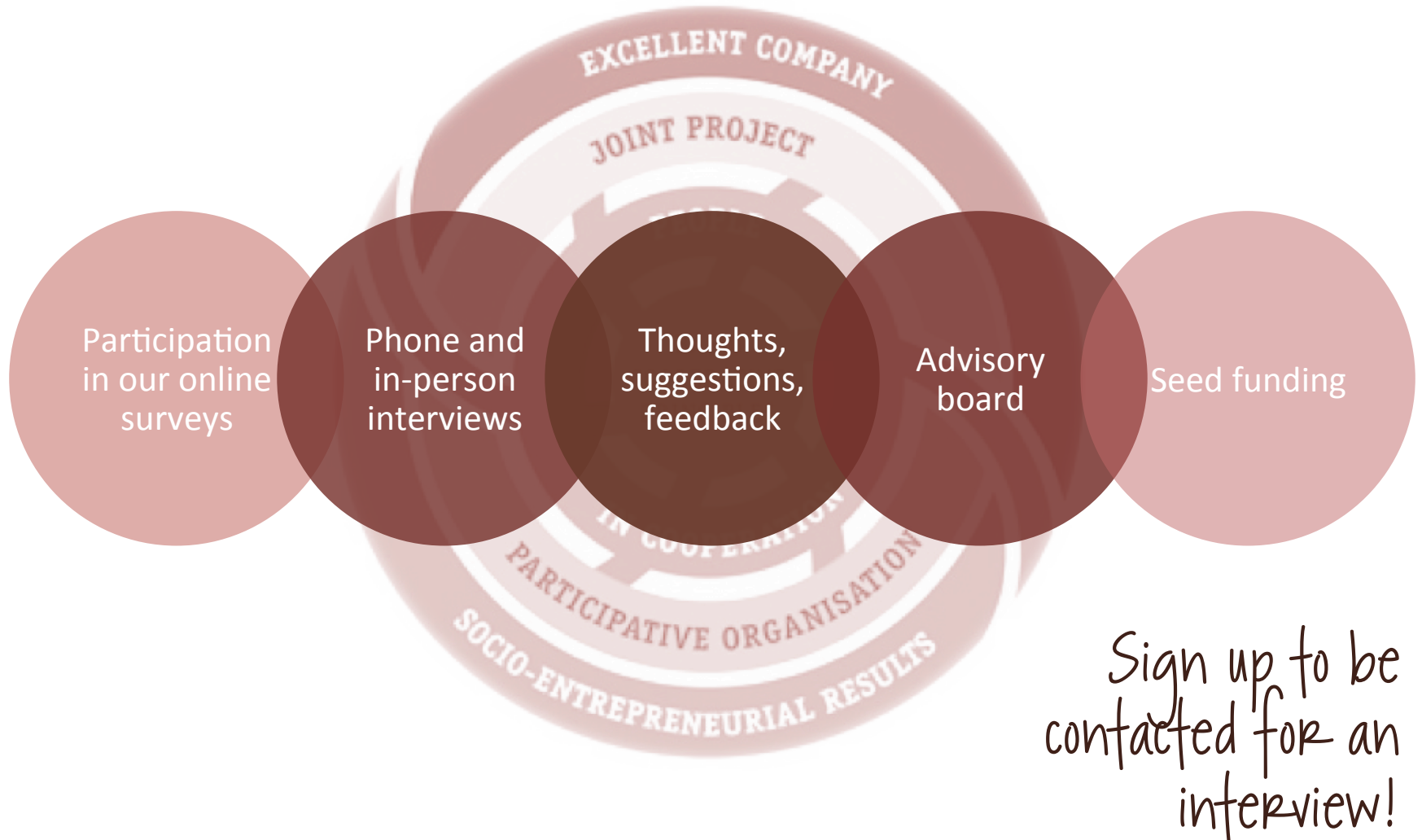
Optimal
product



What are the next steps?



How can you get involved?



Thank you!

Sources & Credits:

Paige Green Photography
American Sheep Industry
Association
Fibershed.com
US Census Bureau
USDA
Iowa State University
Mike Corn, Roswell Wool
Laura M. Baughman
University of California, Davis
Food Commons
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