



**Wool circularity** – removing legal barriers to exploit wool's full potential

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**copa**\***cogeca**  
european farmers      european agri-cooperatives

# Why wool matters

- \* Natural, renewable and biodegradable material
- \* Strong potential for circular applications
- \* Useful for industry, agriculture and bio-based materials
- \* But currently underused across the EU
- \* Wool shearing is essential to ensure the health and welfare of sheep



# Current market situation

- \* Decline of EU wool processing capacity
- \* Heavy dependence on exports for processing
- \* Low prices often do not cover shearing costs
- \* Closure of some export markets worsened the situation
- \* Accumulation of raw wool stocks on farms
- \* Synthetic fibres are wool's biggest competitor
















# Sheep farming in Austria



# Best practice: AUTwool



# Mapping Europe – margins down → wool has become a cost!


Country 	Total annual raw wool production (tons) 	Estimation of the average price of wool marketed (EUR/kg) 	Estimation of the average cost of shearing (EUR/sheep) 	Estimated margin per sheep (assuming a 3-4 kg/sheep/year) 
 Romania	30,000	0.2 EUR/kg	4 EUR/sheep	<b>-3.1 EUR</b>
 Portugal	4,700	0.3 EUR/kg	3 EUR/sheep	<b>-1.65 EUR</b>
 Belgium	2,000	0.1 EUR/kg	2 EUR/sheep	<b>-1.60 EUR</b>
 Spain	20,670	0.5 EUR/kg	2 EUR/sheep	0 EUR
 France	15,000	0.1 EUR/kg	1.5 EUR/sheep	<b>-1.15 EUR</b>
 Ireland	7,000	0.25 EUR/kg	3 EUR/sheep	<b>-1.9 EUR</b>
 Hungary	3,500	0.25 EUR/kg	2.5 EUR/sheep	<b>-1.4 EUR</b>
 Germany	6,500	0.25 EUR/kg	3 EUR/sheep	<b>-1.9 EUR</b>



**Is an average wool production per sheep of 4 kg/year a realistic estimation?**

Yes, 4 kg/sheep/year is a realistic average for European fine and medium wool breeds under typical management conditions.

It is a useful planning assumption, though actual yields can vary from ~2 to 6+ kg/sheep/year depending on breed, nutrition, climate and management.

 Source: internal survey (estimation)



# Core regulatory problem



Raw wool  
classified as  
**Category 3  
animal by-  
products**  
(Reg.  
1069/2009)

Same  
category as  
higher-risk  
animal by-  
products

Direct  
application to  
soil currently  
prohibited

Creates a  
regulatory  
paradox for a  
low-risk  
natural  
material

If no  
authorized  
use → **wool  
becomes  
waste** (under  
Waste  
Framework  
Directive)



# Impact on farmers

- \* Additional costs for storage, treatment and disposal
- \* Loss of circular farming opportunities
- \* Discourages innovation and wool-based solutions
- \* Weakens sheep farm economic viability  $\leftrightarrow$  farmers' need to shear sheep for animal welfare reasons



# Policy recommendations

## Market and industry

- **Prioritisation in the valorisation: textile and industrial use**
- Support development of EU wool washing and processing capacity
- **Promotion** of EU wool to consumers and value chains
- Facilitate exports to textile processing countries

## Regulatory adjustments

- **Reclassify wool** in Reg. 1069/2009 to reflect its very low sanitary risk → **create a new lower risk category / relax requirements**
- Allow low-risk on-farm uses (i.e., fertilisers, compost) → **increase harmonized flexibility in the rules**

## Research, innovation and circular bioeconomy

- **Promote research and pilot projects on wool applications**
- Support circular on-farm and territorial solutions
- Build on results from existing EU projects

**Recognise wool as a renewable agricultural resource**



# Conclusion – wool is an European *Flagsheep!*

- \* Within the framework of EU Bioeconomy Strategy, Circular Economy Act and the upcoming Livestock Strategy:
  - \* Encouraging and prioritising the marketing and valorisation of EU wool should still be the objective → **add value!**
  - \* However, wool is currently treated as a risk rather than a resource
- \* That is why also **regulatory adjustment** is needed to
  - \* unlock circular bioeconomy benefits
  - \* reduce costs
  - \* support farm income and sustainability
  - \* support rural areas and extensive grazing systems
- \* Time to shift paradigm: **wool not as a cost, but as an opportunity → wool is a resource !**



Thank you for your attention!

