

SWEATING THE DETAILS: WORLD LEADER NIKE LAGS BEHIND COMPETITORS

A Report About the Use of Mulesed Wool in Sportswear



Animal Welfare.
Worldwide.



ABSTRACT

Merino wool has gained popularity in the sportswear industry, with all ten of the largest sports and activewear brands now offering merino products. Simultaneously, the growth of the sportswear industry and its value has risen significantly. With an increase in popularity and profit comes an increased responsibility towards animal welfare in their supply chains. The use of merino wool comes, in fact, with a high risk of a painful mutilation practice called mulesing.

Global animal welfare organisation FOUR PAWS investigated the use of wool by the ten largest sportswear brands, focusing on the market leaders – Nike, Adidas, and Puma – who, combined, make up over a third of the industry’s market value. Both, Adidas and Puma have already set public targets for a mulesed-wool-free future while Nike has not. As a result of lab testing, traceability tools and policy analysis data, it is clear that Nike is lagging far behind its competitors when it comes to ensuring better welfare for sheep in their supply chains. Despite claiming to support the use of non-mulesed wool, there is no evidence that the brand has taken significant action to ensure their merino wool is free from mulesing. FOUR PAWS research concludes that there is reason to believe that merino wool in Nike products currently stems from mulesing.



Special thanks to
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1. INTRODUCTION

80% of fine merino wool for the global apparel market comes from Australia where the majority of lambs are mulesed.

Australia is the largest wool-producing country and the only country to practice mulesing.

Over **10 million** lambs suffer through mulesing per year

Marketed as a uniquely high-performance material, merino wool has been increasingly used in the active and sportswear industry for some years now.¹ Due to what are considered to be unique characteristics – merino wool is fine, breathable, naturally elastic, antimicrobial and thermo-regulating – the fibre is increasingly being used not only in thermal undergarments but in yoga pants, sports bras, bike shorts, running shirts, and other garments that not so long ago were never made of wool. The Australian wool industry's Woolmark company promotes the fibre for use in products within the 'high-performance sportswear and next-to-skin apparel' categories.² This marketing strategy is successful, with as much as 80% of fine apparel wool in the world's textile market coming from merino sheep in Australia, the largest wool-producing country.^{3,4} However, practices performed behind the scenes of the wool industry continue to cause controversy, and for good reason.

Unfortunately, the Australian wool industry is far more complex and problematic than it can first appear. The practice of mulesing occurs only in Australia where it was first performed in the 1920s. Mulesing is a mutilation practice where young lambs are restrained while the skin on their backside is cut off with sharp metal shears and without adequate pain relief – if any. Mulesing was invented in order to prevent flystrike – though it does not solve the problem – a disease in which blowflies lay their eggs in a sheep's skin folds, leading to painful and dangerous infestation. Today, over 10 million lambs, who are capable of joy, affection, depression and stress still suffer through outdated mulesing per year, despite the availability of pain-free alternatives which are also more effective.⁵



Did you know that your sportswear could contain mulesed wool?

Sportswear often contains merino wool



Convolutd supply chains lead to a lack of transparency



~86% of Australian merino wool comes from mulesed sheep



~86%
of Australian
merino wool is
mulesed

Plain-bodied
sheep as a
solution

A highly effective alternative to mulesing is available and has proven to be economically viable for the industry.⁶ If wool growers breed 'plain-bodied' sheep, rather than sheep selectively bred to have more wrinkles in their skin, their flock will be more resistant to all forms of flystrike, throughout their whole body, for the entirety of their lives. This solution negates the need for any painful mulesing.

Products sold around the world using fine merino wool are most likely to come from Australian mulesed lambs. Mulesing is prevalent in Australia, not just because of flystrike but because lambs have been selectively bred to have more skin folds. These wrinkles were inaccurately thought to result in more wool, and instead put sheep at a greater risk of flystrike.⁶ Currently, just 14% of Australian wool is mulesing-free.⁷ If no action is taken to prevent mulesing in supply chains using such wool, it is most likely that this cruel practice will continue.

In order for mulesing to become a thing of the past, wool growers need support from their industry and clear and reliable communication from brands that only non-mulesed wool will be acceptable going forward. Brands that oppose mulesing must publicly communicate their plans to phase out the practice and improve animal welfare, towards consumers and the media. When setting their time-bound phase-out plans, brands encourage their supply chain partners and the rest of the industry to follow suit.

Consumers have
been demanding
higher animal
welfare in
fashion

Sports and activewear sales have steadily risen over the course of the pandemic, in turn resulting in greater profits for brands.⁸ Even after the pandemic, the sportswear industry is still expected to grow. The global sportswear market was valued at more than USD 160 billion in 2020 and according to Fortune Business Insights it is expected to reach USD 267 billion by 2028.⁹ Over a third of the market share is held only by three brands: Nike, Adidas, and Puma.

With growing popularity and an increase in profit comes a greater responsibility for activewear brands to implement higher corporate social responsibility standards, and these must include ensuring higher welfare for all animals which remain in their supply chains. This is in line with what a growing number of consumers expect of brands. Since the beginning of the pandemic more consumers have been demanding higher animal welfare in fashion. In fact, a YouGov opinion poll commissioned by FOUR PAWS in 2021 showed that 86% of the 14,000 respondents across twelve countries want companies to make animal protection a key priority alongside environmental protection and social standards. Almost one third of respondents stated they are now seeking out products with high animal welfare credentials, or which are completely free from animal-derived materials.¹⁰

This report aims to bring awareness to the issue of mulesing – which has quite recently grown in relevance within sportswear supply chains – and aims to assist brands and consumers in making informed decisions.

There is huge potential for a significant reduction of animal suffering across the fashion industry. Over the last 30 years, FOUR PAWS has exposed cruel practices in the textiles industry and over the past decade, has worked successfully with a number of progressive brands within the activewear and fashion industry towards this improving animal welfare, resulting in industry-wide shifts. These have included a broad and ongoing trend of brand transitions away from force feeding and live plucking of ducks and geese in the down industry, and a significant rise of retailers signing up to the Fur Free Retailer programme.

The most recent work by FOUR PAWS on wool has seen a number of brands sign on to an open letter encouraging the wool industry itself to phase out mulesing, join the ‘brands against mulesing’ list, or commit to only ever using certified non-mulesed wool before the end of the decade in their animal welfare policies.¹¹ In 2021, these brands included Calvin Klein, Marks & Spencer, Vero Moda, Kathmandu, Hugo Boss, and several more. In order for mulesing to become a cruel practice of the past, it is now time for the activewear industry to commit to higher animal welfare by ensuring only certified mulesing-free wool is used in its products.

2. COMPARISON: SPORTSWEAR MARKET LEADERS AND THEIR USE OF MULESED WOOL

The **10** largest sports brands all use merino wool. FOUR PAWS analysed the top 3 players.

In order to better understand the extent to which the sportswear sector uses merino wool, FOUR PAWS has investigated the ten largest global sportswear brands¹² and discovered that all of these produce and sell merino wool garments. Of these ten brands, FOUR PAWS has further assessed the three market leaders in sportswear production and analysed their efforts to exclude mulesed wool from their supply chains. These three leading brands are Nike, Adidas, and Puma. With revenue of over USD 66 billion between the three brands in the 2019/20 financial year, they have the resources in place to enable higher animal welfare and serve as role models for the wider industry.^{9,13} The data that was considered in the assessment included laboratory testing of the brands' products to evaluate the likelihood of wool originating from mulesing, and an analysis of publicly available brand policies to better understand the extent to which the brands have put an effort into excluding wool from mulesed sheep.

2.1. LAB RESULTS FROM NIKE, ADIDAS, AND PUMA PRODUCTS INDICATE A HIGH RISK OF MULESED WOOL

An independent assessment of wool fabric samples obtained from Nike, Adidas, and Puma merino products served as one indicator for the likelihood of mulesing being associated with the three brands' supply chains.

An independent laboratory in the UK has conducted wool sample testing to analyse for different characteristics. Microtex tested the wool fibre quality according to the Australian Wool innovation specifications to determine the wool diameter and cuticular scale. Based on this analysis, FOUR PAWS can draw conclusions about the

likelihood that the fibre originated from Australia. Given the high prevalence of mulesing within the merino wool industry in Australia, when the qualitative characteristics of the samples match those of merino wool originating from Australia, this enables us to determine how probable it is that the wool may have originated from mulesed sheep.



In order to be classified as pure merino wool, according to Australian Wool Innovation specifications, fibres should have a maximum mean diameter of 22 microns. Fibre diameter distribution measured under projection microscopy, along with cuticular scale pattern assessment by Microtex scientists, showed that wool samples from each brand were entirely consistent with the qualitative characteristics of pure merino wool.

While wool with a diameter of under 22 microns can be sourced from other parts of the world, 80% of fine merino wool is sourced from Australia.^{2,3} Given this result, it is highly likely that wool from all three brands originated from Australian merino lambs.

Without a strong commitment to ensure only mulesing-free wool is being sourced, there is a high risk of this mutilation practice occurring in brands' supply chains.

9 out of **10**
consumers want
brands to make
animal welfare a
key priority

2.2. POLICY ANALYSIS OF NIKE, ADIDAS, AND PUMA SHOW THAT ONLY NIKE HAS NOT YET COMMUNICATED MEASURES TO RELIABLY EXCLUDE MULESED WOOL

Following talks with FOUR PAWS, in May 2021, Puma committed to only using certified mulesing-free wool by the end of 2025. This commitment is now public as a part of Puma's Animal Welfare Policy.¹⁴

Meanwhile, in September 2021, Adidas signed a FOUR PAWS open letter to the Australian wool industry, signalling their support for an end to mulesing in the industry by 2030. Brands who have signed this open letter are either already mulesing-free or on their way to meeting rising consumer demand for higher animal welfare credentials.¹¹

In contrast, Nike has not communicated any measures to reliably exclude mulesed wool from their products. Nike 'supports the use of wool fibre that is sourced and certified from non-mulesed sheep', but this support without a ban on mulesed wool and aligned action – such as a clear timeline to switch to certified non-mulesed wool – is not enough to protect lambs.¹⁵ Nike is clearly not the market leader on the mulesing agenda. Nike is lagging behind its competitors, and it is letting down lambs and the nine out of ten consumers who want brands to make animal welfare a key priority.¹⁰

Nike is the biggest sportswear brand in sales, followed by Adidas and Puma.⁹ The latter have both already made public commitments to a mulesed-wool-free future.^{11,14} Despite its position as market leader, Nike is yet to match its market share ambitions with a willingness to end the suffering of lambs across the sportswear sector.

3. WHAT BRANDS CAN DO TO BETTER PROTECT SHEEP

An end to mulesing is feasible and more than 3,000 Australian wool growers have proven it. In December 2020, the Australian industry body Australian Wool Innovation released their 10-year plan, which announced the target of giving wool growers the confidence and tools to manage flystrike without mulesing by 2030.¹⁶ This was a momentous decision, and one that aligns with consumer demand and the growing number of brands speaking out against mulesing. However, tangible measures, tools and plans to support wool growers in their efforts to end mulesing are yet to be communicated. In order to ensure the cruelty of mulesing ends as soon as possible, industry and brands alike must put measures in place today and make sure this goal is met or even exceeded.

Some of the first steps brands like Nike can take to improve animal welfare in their supply chains include:

- **Refining their use of wool by committing to only sourcing mulesing-free wool that is certified and traceable.**
 - Brands should engage with their supply chain partners, find out more about the origins of their wool, and explore how these supply chains would need to change in their process of transitioning to non-mulesed wool.
 - Brands should communicate with robust certification standards such as the Responsible Wool Standard or NATIVA™ to explore the beginning of the transition process.
 - Brands, such as Nike, should make a public commitment similar to that of their competitors Adidas and Puma to phase out mulesed wool by 2025 or, at the latest, 2030.

FOUR PAWS offers a transition guide for brands and retailers looking to use only certified non-mulesed wool, which brands could explore and begin to put into practice.¹⁷

Reduce.
Refine.
Replace.

■ **Reducing the amount of wool used in their collection and replacing such products with sustainable, animal-free alternatives such as Tencel, or organic and recycled cotton.**

This decision could allow brands to be more intentional and responsible in their use of raw materials, while ensuring a reduction of lamb-suffering and benefiting from the rise in demand for sustainable plant-based and cellulosic materials, which are rapidly transforming the industry landscape.

Large, highly profitable brands like Nike have the capacity to not only use existing animal-free materials but to invest in up-and-coming innovations such as algae fibre, which is sustainable and ethical.



4. CASE STUDY: NIKE'S SUPPLY CHAIN NEGLIGENCE IS PUTTING LAMBS AT RISK

4.1. SUMMARY OF EARLIER FINDINGS ON NIKE AND ITS POSITION ON MULESING

While public Nike communication states that the brand 'supports the use of wool fibre that is sourced and certified from non-mulesed sheep', FOUR PAWS research has neither found evidence that the brand has banned or committed to banning mulesing, nor found data on any efforts via which Nike demanded fully verified mulesing-free wool, based on robust certification schemes, be used in its products.¹⁶

Nike notes that in line with their support of non-mulesed wool sourcing, the brand will 'consolidate its wool sourcing accordingly, as rapidly as supplies and pricing allow'. Despite this, Nike does not offer any further information into their plans to do so, nor does it communicate current limitations they are working to overcome, or any other relevant information. Nike's current position allows them to continue to use untraceable and probably mulesed wool for an indefinite period of time, and it does not encourage the wool industry to make swift progress.

Without a clear ban on mulesing, lambs in Nike's supply chains are likely to suffer. Nike does not disclose the country of origin for their raw materials such as wool, as they state that they do not source raw wool but only processed materials, goods and garments made in China – where 90% of Australian raw wool is exported for further processing.¹⁸ If a brand does not know where their raw materials come from, this does not negate their responsibility to ensure those raw materials are ethical – it highlights a supply chain in need of greater transparency. The lack of transparency in current Nike

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supply chains is both risky and unacceptable, especially when, in the absence of certification, fine merino wool from farms that allow mulesing could land in their wool products.

All of this lack of information and commitment from Nike means the brand cannot claim to be only sourcing wool from non-mulesed lambs. When non-mulesed wool is easily available to brands, particularly those with as significant resources as Nike, there is no excuse to risk using mulesed wool, and no reason to evade their responsibility to set a clear plan to shift away from it.

FOUR PAWS has further investigated Nike's use of wool to explore the already significant likelihood of mulesing in its supply chains, in order to show why it is important to make a clear commitment and source wool only from reliable mulesing-free accreditation schemes, which can guarantee strong traceability.

4.2. REPEATED ATTEMPTS AT DIRECT CONTACT WITH NIKE – NO RESPONSE

FOUR PAWS has exhausted contact with Nike in efforts to inquire where their wool comes from, whether it is free from mulesing, and offer information on how to transition towards mulesed-free wool. The last time FOUR PAWS attempted contact with Nike in order to understand more about their wool sourcing was in February and March 2022 prior to the report's release. Before that, FOUR PAWS had attempted contact repeatedly since December 2019. These attempts at communication have included direct contact with Nike's Corporate Social Responsibility team members, e-mails and inquiries to the brand through their customer service team, their website and an app, during a Sustainable Textiles Conference attended by both FOUR PAWS and Nike, and via formal letters posted to their headquarters. None of these communications have been responded to.

Nike has also been assessed in both the FOUR PAWS Animal Welfare in Fashion report (receiving a score of only 42%, below the 55% industry average) and the FOUR PAWS mulesing brand-check.¹⁹ In the FOUR PAWS report, Nike ranked second to last in the sportswear category when it came to animal welfare. In the FOUR PAWS mulesing brand-check, Nike again received a very low score due to their lack of concrete mulesing-free targets and lack of transparency.²⁰

If Nike was acting in alignment with their guidelines, in which they communicate their support of certified non-mulesed wool sourcing, the brand and its representatives would have all the reasons to respond to enquiries from FOUR PAWS and disclose their efforts to

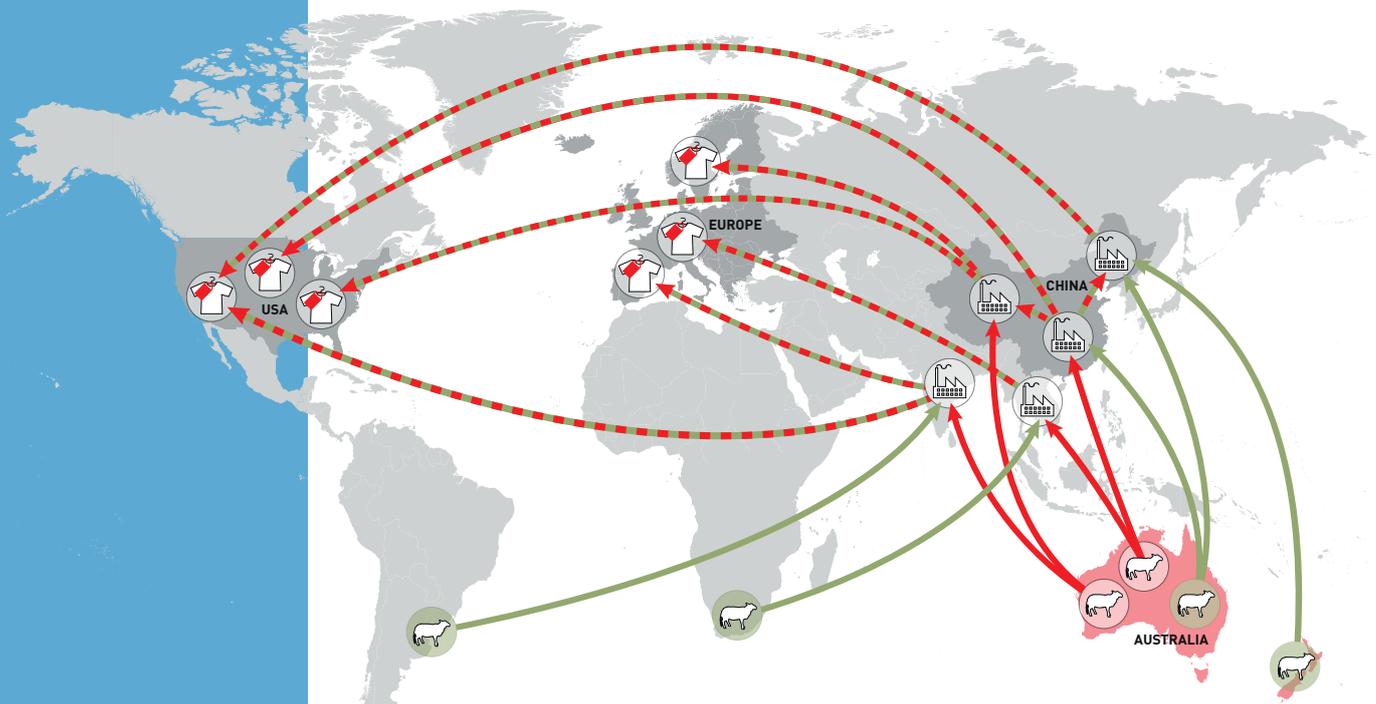
Nike scores low
on animal welfare

the organisation, as well as to consumers who seek out non-mulesed wool products. Nike's silence and unwillingness to communicate further on their use of wool can only suggest that the brand is not taking responsibility for the lambs in their supply chain.

4.3. INDEPENDENT RESEARCHER TRIED – UNSUCCESSFULLY – TO TRACE NIKE'S MERINO WOOL USING INDUSTRY TOOLS

Using intelligence platforms designed for trade professionals, an independent external researcher found that merino wool cannot be traced back by interested consumers, the broader fashion industry nor any government officials, even with the use of the best available tracing tools. Only brands with the help of their supply chain partners can trace their raw materials back to tier-1 of the supply chain (farms where lambs are often mulesed), and they can only do so if they commit to prioritising supply chain traceability.

If Nike is not tracing its wool, the brand cannot safely say that their wool is mulesing-free, no matter what they claim to support.



Australia is the world's leading producer of wool. Over 90%⁴ of all wool exports for the global textiles market originate from Australia – the only country that practices mulesing.



98% of Australia's wool is exported to manufacturing countries⁴ – with the vast majority (90%) ending up in China.¹⁸ There the wool is mixed with other wool and other materials based on the brand's quality demands. Without traceability systems in place, such as robust certifications, unwanted mixing of mulesing-free with mulesed wool can happen.



Australia produces about 345 million kilos of wool every year⁴ – about one quarter of the world's wool. In 2017/18, the amount of Australian wool sold was equivalent to 869 million wool jumpers/sweaters.

— Mulesed wool & fabric

— Mulesing-free wool

— Mixed wool & fabric

4.4. NIKE UNDERSTANDS SUPPLY CHAIN TRACEABILITY AND RESPONSIBILITY, BUT THEY AREN'T PUTTING IT INTO ACTION FOR LAMBS

Nike's brand thrives off positivity and potential for change. Nike encourages people to 'just do it', to take the plunge and change their lives – through exercise, getting active, and living healthily. Nike understands the value of wellbeing and helps to create this for people, yet the brand does not ensure the wellbeing of lambs, who are put in harm's way for its products.

The latest Fashion Transparency Index rating of Nike showed real and positive progress by the brand.²¹ Nike should be well aware of the potential for mistreatment of individuals in a supply chain that is not properly traced, audited, and managed, and this means they can continue to do better. While Nike still has a lot of work to do surrounding fair garment production – as with the vast majority of brands – the brand has progressed significantly since some of its past public scandals.

As far back as the 1970s, Nike has been accused of using sweatshops and child labour to produce its shoes and activewear. During the 1990s, an intense public pressure campaign against Nike's use of unjust labour eventually led to the brand increasing the minimum age of workers, as well as increasing and improving factory audits and supply chain monitoring efforts.

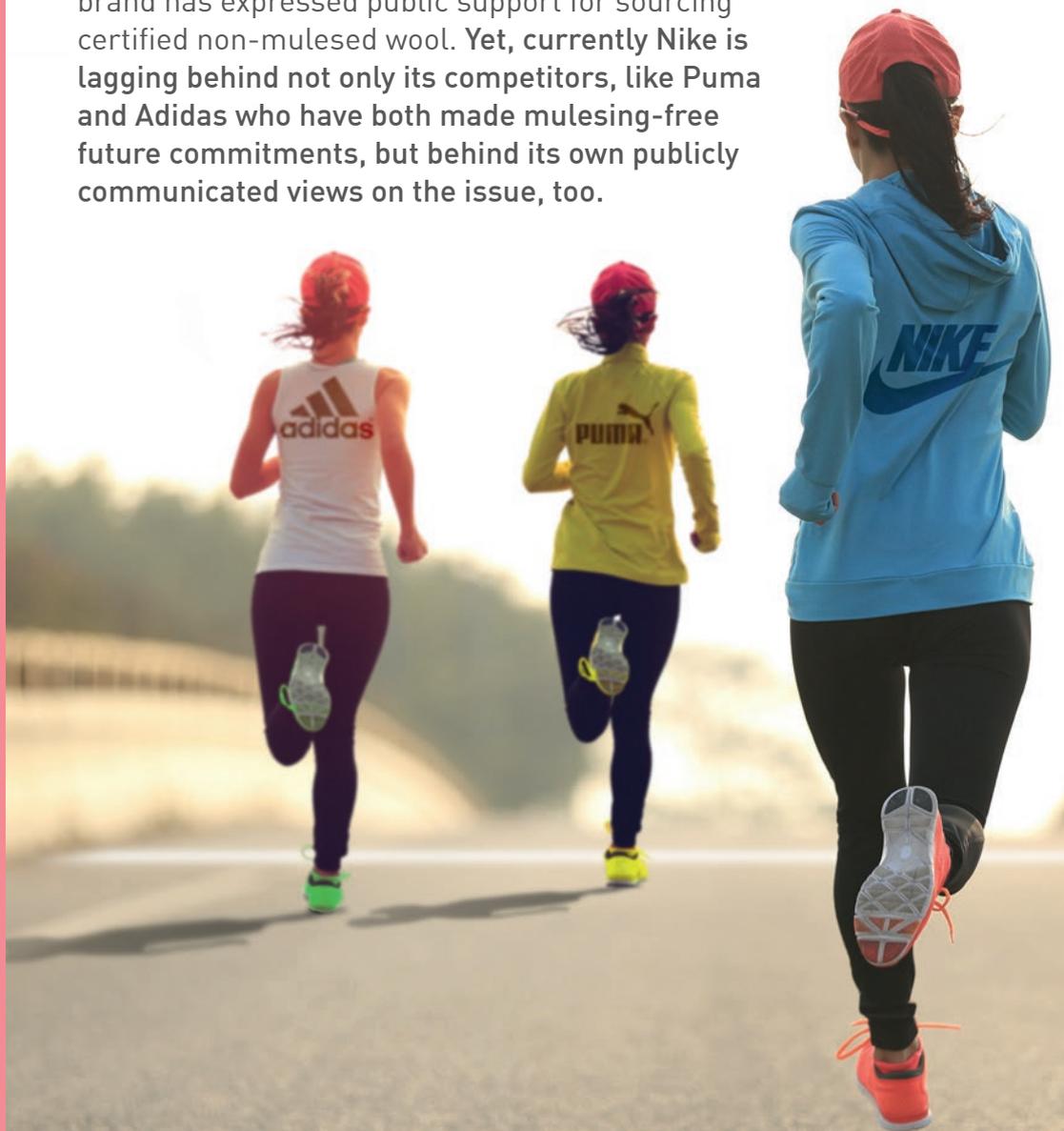
This progress is important and much needed, and it also shows that Nike understands traceability, what is needed in order to build a more responsible supply chain, and the importance the public places on responsible fashion. Yet, Good On You's ranking of Nike's animal welfare efforts specifically was 'Not Good Enough'.²² It is not a lack of ability but a lack of willingness which is holding Nike back from being a true leader in the ethical and higher animal welfare fashion spaces.

It is not a lack of ability but a lack of willingness

5. CONCLUSION

The sports and activewear industry is increasingly important to the Australian wool industry, which produces the majority of merino wool, and which is the only industry subjecting lambs to painful mulesing. It is for this reason that brands – especially those in the increasingly profitable sportswear industry – must take immediate steps to cut mulesing out of their supply chains.

Nike is one the most financially successful sportswear brands in the world, and with this title comes responsibility to lead the industry in a positive direction. Nike has – more so than many other brands – the capacity to control its supply chains, demand better from its partners, and join brands like Puma and Adidas in leading the way on more progressive animal welfare policies across the rest of the industry. Nike recognises the importance of protecting lambs from the painful mutilation of mulesing: it is for this reason that the brand has expressed public support for sourcing certified non-mulesed wool. **Yet, currently Nike is lagging behind not only its competitors, like Puma and Adidas who have both made mulesing-free future commitments, but behind its own publicly communicated views on the issue, too.**



The wool Nike uses today is highly likely to come from lambs who have suffered through mulesing. Today, with more compassionate, effective, tested, and available alternatives to both mulesing and flystrike, there is no excuse for mulesing to continue. Nike has a real opportunity to become a leader in the fashion industry by refining, reducing and replacing animal-derived materials in their products. Committing to sourcing wool only when it is from robustly certified mulesing-free supply chains is a simple and simultaneously momentous step Nike could take, given their resources and abilities.

Today, more consumers are demanding higher animal welfare from the brands they purchase from, and Nike will not be fulfilling this need as long as it continues to sell wool that is not transparently sourced, traceable, or certifiably free from mulesing.

We have reached a decade where there is more momentum than ever to enable the end of mulesing. Brands that genuinely believe in higher animal welfare, and that would like to be seen as responsible by the people who buy or may buy their products, have the chance to be a part of and even drive the phasing out of this cruel mutilation.

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About FOUR PAWS

FOUR PAWS is the global animal welfare organisation for animals under direct human influence, which reveals suffering, rescues animals in need and protects them. Founded in 1988 in Vienna by Heli Dungler and friends, the organisation advocates for a world where humans treat animals with respect, empathy and understanding. The sustainable campaigns and projects of FOUR PAWS focus on companion animals including stray dogs and cats, farm animals and wild animals – such as bears, big cats and orangutans – kept in inappropriate conditions as well as in disaster and conflict zones. With offices in Australia, Austria, Belgium, Bulgaria, Germany, Kosovo, the Netherlands, Switzerland, South Africa, Thailand, Ukraine, the UK, the USA and Vietnam as well as sanctuaries for rescued animals in eleven countries, FOUR PAWS provides rapid help and long-term solutions.

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