“Pakistan earns foreign exchange by exporting wool, then why does Pakistan import wool, rather than using its own wool?”

By

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Indus Valley School of Art and Architecture
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ABSTRACT

Wool, one of the oldest textile fibres, is still known as an important textile fibre today. However, wool has been in relative decline over the years. Thought there are many different kinds of wool but Pakistan mostly produces carpet quality wool and the best variety of wool comes from Baluchistan and Cholistan.

This dissertation points out as to why the woollen industry is in decline over the years. It talks about the processes of wool sorting before it is ready to be sold or exported.

This dissertation highlights the facts about how wool is sold in low prices due to the wool quality. Such quality is not accepted in the international market and so wool exports and imports have lessened over the period of time. The only imports which take place are for local industries that manufacture winter wear apparel, since apparel quality wool is not produced in Pakistan.

This dissertation gives a brief outline on world wool production, consumption and where Pakistan stands in the international market. Wool and textile industry is one of the sources of foreign exchange earnings for the developing country that’s why it is important to know where Pakistan stands in the market or does it even stand somewhere or not.

This dissertation is an attempt to find out about the import and export of Pakistani wool industry. The question arises as to why is the import more than the export? It outlines the different problems the Pakistani woollen industry is facing over the years. Each problem is described, so that it is easier for the reader to understand. It will tell the reader why there has been a decline in the imports and exports.

It briefly talks about the problems that the government can solve but no incentive is taken by them to make the wool import and export better due to which very less foreign exchange is flowing in the country.

In order to reach the purpose of this dissertation interviews were carried out whereby the reader can decide whether the research has reached the conclusion or is it open ended. The literature review will make it easier for the reader to understand what the dissertation is all about.
INTRODUCTION

I’ve been reading a lot of articles regarding textiles. Wool was one of the topics I was really interested in, so I thought of looking into the possibilities. I started reading a lot of articles online, articles in the new paper and by reading different papers online I felt my topic should take in account the export and the import of wool in Pakistan.

Pakistan exports and imports wool too many different countries. In a report of 1992, Pakistan exports wool worth 4 billion and import wool worth 7 million. For different types of garments fine wool is imported for local industry so that woollen apparel is manufacture\(^1\).

Pakistan is known for producing carpet quality wool, so in order to make woollen apparel, socks and other winter apparel, Pakistan has to import wool from different countries.

The export in 1992 bought more revenue since the export was more, with time the exports have fallen due to a sudden change in the carpet industry.

I strongly believe that the Pakistan wool import and export sector is not given too much emphasis on and this is the reason I thought of doing my dissertation on the export and import of wool.

Pakistan’s exports are highly concentrated by commodity, currently the majority of exports in the textiles and apparels sector. Pakistan trades with countries outside South Asia. Countries like China, Bangladesh and Hong Kong\(^2\).

A lot has been done in recent years to improve the business climate in Pakistan. However, Pakistan still lags behind other countries like India, china and Thailand and future progress can be made. Nevertheless, like many other developing countries, Pakistan still struggles with the task of effectively accessing export market\(^3\).

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\(^3\) Pakistan Institute of Development Economics Quaid-i-Azam University Campus, Islamabad. *Trade Related Challenges Facing Exporters In Pakistan*. United Nations Industrial Development Organization, Trade Related
Pakistan is far behind from other countries in the export and import sector, this is because Pakistan is still an under developing country and also because this sector is not given too much emphases on.

My dissertation might help people to understand a lot of problems which are over looked in the export and import sector. Export is very important for Pakistan as it brings foreign exchange in the country but at the same time when we are spending double the amount in importing wool, what’s the point of importing it? Why can’t we just use our own wool to make products and then export the products which can bring a better foreign exchange to our country? Such questions will be answered throughout my dissertation because clearly till now I have not found any answers to my questions. No search as yet has answered the problems my dissertation is facing.

The most appropriate articles have been considered for the secondary research. The articles which suited best for the research have been taken into account so that the dissertation could be completed.

This research is purely based on qualitative analysis. The information has been gathered from various articles, newspapers, internet and different magazines.

So far I haven’t reached any conclusion and I have a feeling that I won’t reach a conclusion; my dissertation might be open ended.

This research was carried out by interviewing people, people who are directly associated to the wool sector of Pakistan. It was necessary to keep in mind that the most authentic information was suppose to be carried out which made it even more complex to interview people.

These methods of research were important to discover the answers to the problems the research was facing.

Revenue for a country is very important and especially for an under developed country like Pakistan. This dissertation is an attempt to address the issue about imports and exports of wool and how being an underdeveloped country Pakistan has to face more problems.

Technical Assistance (TRTA).

LITERATURE REVIEW

Literature review stands out as the main tool of the research study. Data related to the Pakistani wool import and export sector was thoroughly collected. Sources of data include books, newspapers, journals, research reports and internet.

ABOUT WOOL:

Pakistan produces large variety of wool. Pakistani wool is ideal for carpet weaving. The best variety comes from Baluchistan and Cholistan. It is strong and resilient qualities that help to make the pile firm but soft\(^4\).

There are many different kinds of wool but Pakistan mostly produces carpet quality wool. These different kinds of wool include wool for winter wear and apparel.

There are many processes of sorting wool. Some of them are:

- Shearing:

  Sheep shearing is the process by which woollen fleece of a sheep is cut off after shearing. The wool is separated into four main categories: fleece (which makes up the vast bulk), broken, bellies and locks. The quality of fleeces is determine by a technique known as wool classing, whereby a qualified person called a wool classer groups wools of similar grading together to maximize the return for the farmer or sheep owner\(^5\).

  This process is important as the wool is put into different classes. It is then decided which wool quality is required by which costumer and for what purpose. This process is useful for farm and sheep owners as they distribute wool to wool buyers and it is also easy as it maximizes the return.

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• Scouring:

Wool straight off a sheep, known as ‘greasy wool’ or ‘wool in the grease’, contains a high level of valuable lanolin, as well as dirt, dead skin, sweat residue, pesticide and vegetable matter. Before the wool can be used for commercial purpose, it must be scoured, a process of cleaning the greasy wool. Scouring may be as simple as a bath in warm water, or as complicated as an industrial process using detergent and alkali and specialized equipment.  

Scouring is a process whereby the wool is cleaned before it is used for commercial purpose. 

According to an article ‘Grading and marketing of wool’ by Dr Rao Zahid Abbas, Dr Zafar Iqbal & Dr Kashif Saleemi, Wool is the most misunderstood and abused part of the sheep in Pakistan. The desire of wool as a fabric has made its production at an all-time high level. However, Pakistani sheep producers do not share the benefits of its popularity. The wool crop often sells at a lower price because of the poor quality reputation based on improper care of the fleece, both before and after shearing. 

The wool is sold at a very low price because the wool is damaged during the process of shearing and also because the sheep has fleece which damages the wool. Due to the poor quality of wool the buyer gives less money, though wool can provide a significant source of income. 

The difference in fleece yields results from variation within and between breeds and is affected by climate, nutrition, wool grease and foreign matter - a valuable product that is easily spoiled. The primary spoilage agent is foreign matter such as dirt, chaff, burrs, hay, straw, seeds and grain. Contamination should be prevented while the fleece is on the sheep’s back by keeping the facilities clean, and careful shearing during storage. 

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The sheep’s are not kept clean, less time is spent with them and due to weather changes the fleece attack the sheep’s due to which a very valuable item for consumption is spoilt and because of the damage which is caused by dirt and fleece wool is sold in less price.

The article ‘Grading and marketing of wool’ by Dr Rao Zahid Abbas, Dr Zafar Iqbal & Dr Kashif Saleemi also mentions that the turnout is ordinarily sold in pounds on the basis of grade, class, and quality. “Grade” refers to fineness of fibre “class” to length, “quality” to be free of foreign material and “life” to the character. Grade can refer to either of the two systems, the American or Blood system which is being replaced by the Count system - a more technical method of grading by fibre diameter. Pooled wool offered on a volume basis is more attractive to buyers and gets a higher price because it saves the buyer’s time and money. There are a limited number of wool merchants and mills in Pakistan that buy wool directly from the grower with payments made after inspection.  

**WOOL PRODUCTION:**

According to a book, ‘THE INTERNATIONAL WOOL TRADE’ written by Julian Roche, Approximately 40% of worlds wool production is traded, which makes it an important traded commodity in its own right.  

According to Saurer Management AG, Winterthur, Switzerland reports world wool production at 1.22 million tons in 2005. Australia, PR China, New Zealand and Argentina produce more than 50% of the global wool output. The production of wool in Pakistan reported by Wool Text House is 0.0545 million tons which works out at 4.4672% of the global output. Pakistani wool is mainly used for the production of carpets and blankets. For the manufacture of apparel and winter wear fine and super-fine merino wool is imported by the local industry.

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As mentioned the report mentions about Pakistani wool which is mainly imported by other countries for the production of carpets. Local Pakistani industries import wool for the manufacturing of winter wear and apparel, since apparel quality wool is not produced in Pakistan.

Pakistan produces large variety of wool. Pakistani wool is ideal for carpet weaving. The best variety comes from Baluchistan and cholistan. It is strong and resilient qualities that help to make the pile firm but soft\(^{12}\).

The main products manufactured by the Woollen Industry in Pakistan are Woollen Yarn of 6.864 M.kgs, Acrylic yarn 6.960 M. kgs, Fabrics 3,445 (M.sq.meter), Shawls 13.353 Million, Blanket 657,235, and Carpet 3.5 (M. Sq. meter).\(^{13}\)

Other than these products Pakistan produces different kinds of winter apparels for which they import wool from many different countries.

The report ‘NATIONAL COORDINATED RESEARCH AND DEVELOPMENT PROJECT FOR THE IMPROVEMENT OF WOOL QUALITY’ prepared by Pakistan Agricultural Research Council in the year 2002, talks about how Pakistani wool is one of the sources of foreign exchange earnings for the country. It states that Pakistan is number 11 in the world with sheep population of over 24 million (28 breeds). Sheep products like wool or wool products such as carpets constitute one of the major export products from Pakistan. Only the carpets, wool and other woollen products exported in 1999-2000 were valued Rs. 10.26 billion. According to Agricultural statistics of Pakistan, 2000-2001, 2500 tons of wool was imported; mostly for apparel purpose


which can be reduced significantly by involving fine wool breeds like Ramghani and Nimchi in NWFP and Northern areas\textsuperscript{14}.

Further on it talks about how sheep raising is a mean to increase the standard of living of the landless and poor people producing them. They are being exploited and used. The farmers mostly receive very low price due to improper marketing system in the country. It also leads to great deal of adulteration in wool with dust and other unwanted particles. This practice is adopted by the middle men with a craze to get more money. This has led to reduced quality of course wool produced in Pakistan. The adulterated wool also causes loss to woollen industry and national economy as well\textsuperscript{15}.

**WOOL CONSUMPTION:**

According to an article ‘Production of textile fibres and consumption trends’ by Dr. H.R. Sheikh, Professor Emiritus, Textile Institute of Pakistan, The data of production and consumption of wool in Pakistan for the previous years is not available. However, as already mentioned the indigenous woollen textile industry consumes local supplies of wool for manufacture of carpets rugs and blankets and imports fine quality merino wool for apparel required for winter\textsuperscript{16}.

Merino wool is not produced in Pakistan due to which Pakistan has to import merino wool. Merino wool is a very fine and soft quality of wool used for making apparel and winter wear.


Merino wool is the material shorn from Merino sheep. These sheep are sought after for their coats, which are said to produce the finest, softest wool available. This wool is often used for athletic garments, as it breathes and wicks better than most synthetic fabrics. The wool comes in different grades that are based on the strain of sheep and its associated climate setting. Even though Australia is the leading producer of Merino wool, New Zealand produces the highest quality of this soft wool.

Since the sheep’s in Pakistan does not produce merino wool, Pakistan has to import merino wool.

**WOOL IMPORT AND EXPORT:**

Major wool exporters are Australia, New Zealand and the EU. Although Australia and New Zealand they are not direct competitors to one another because of the different types and qualities of wool that they export. Argentina, South Africa and Uruguay are the next largest exporters. The shave of all the other wool exporting countries, which include, Mongolia, Chile, the CIS countries, Pakistan, India, Norway and Ireland rose from nearly 6% in 1980 to 8% in 1990 and is continuing to rise.

World wool export increased from 1.19m tones in 1980 to a peak of 1.46m tones in 1987, according to a book ‘THE INTERNATIONAL WOOL TRADE’ by Julian Roche. However the rise in wool prices and -it is held- some discontent from importers in respect of quality standards, in 1988 inter alia curtailed demand and caused exporters to fall to 1.03m tones by 1990.

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http://www.wisegeek.com/what-is-merino-wool.htm


http://books.google.com.pk/books?id=FjPMSe1oOJIC&pg=PA102&dq=wool+export+and+import+from+pakistan&hl=en&sa=X&ei=x42-T5zbDIvIrQe14OzDQ&ved=0CGAQ6AEwBg#v=onepage&q=wool%20export%20and%20import%20from%20pakistan&f=false


http://books.google.com.pk/books?id=FjPMSe1oOJIC&pg=PA102&dq=wool+export+and+import+from+pakistan&hl=en&sa=X&ei=x42-T5zbDIvIrQe14OzDQ&ved=0CGAQ6AEwBg#v=onepage&q=wool%20export%20and%20import%20from%20pakistan&f=false
The book ‘INTERNATIONAL WOOL TRADE’ talks about the wool industry and the trading mechanisms. The patterns of trade are explored, together with the various international arrangements that are associated with the wool trade. The book goes on talking about how the exports and imports have increased and decreased over the time due to different reasons.  

Pakistan imports its wool requirements mainly from China. According to wool Texpro officials, Pakistan imports large quantities of woollen textile from many countries.

This is because Pakistan mainly produces carpet quality wool and to make different woollen apparel Pakistan has to import wool from different countries.

Pakistani carpet industry competes in the international market. The government should announce some incentives to encourage sheep farming in the country as only due to high prices of wool in the country carpet export has fallen down from $300 to $100 million. Sheep farming should be encouraged to ensure better wool.

If sheep farming is not encouraged good quality wool would not be produced. If good quality wool is not produced, exports will become less and Pakistan will have less revenue coming in.

According to an article ‘ENVIORNMENTAL FACTOR AFFECTING PRE-WEAVING GROWTH TRAITS OF HISSARDALE SHEEP IN PAKISTAN’ written by P. Akhtar, Z. Ahmad, G. Mohiuddin, S. Ali and K. Javed, Wool from almost all the breeds of sheep in

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Pakistan is of carpet quality. Annual production on wool is estimated to be 53.1 thousand tones out of which over one thousand tons of raw carpet wool amounting rs100 million is exported.\(^\text{23}\)

Foreign exchange that flows in the country is more than four billion however seven million is spent on the imports of fine wool required by the local industry from the manufactures of apparel clothes.

**PROBLES AND ISSUES FACED BY THE PAKISTANI WOOLEN INDUSTRY:**

Textile industry currently faces massive challenges. Despite introduction of five-year Textile Policy, implementation is yet to be seen. This implies high policy risk for the sector.\(^\text{24}\)

Currently Pakistan’s wool industry is going through a lot of problems. Not only the wool industry but all sorts of textile based industries are facing multiple of issues.

A report on ‘THE TEXTILE INDUSTRY OF PAKISTAN’ states the problems faced by the local industries. The problems are listed below:

- **ELECTRICITY AND GAS CRISES:**

  The lower availability of electricity was also a key constraint for the value-added textile sector. According to State Bank’s quarterly report, unfortunately, due to circular debt local refineries could not provide required Furnace Oil quantity to power generation companies. As a result, import burden has increased. The growth seen in Jul-Dec will be challenging to sustain in the remaining month given the inadequate energy balances in the country.\(^\text{25}\)


INCREASE IN THE EXPORT FINANCE SCHEME:

The textile sector faced a decline in its growth due to severe energy crises specifically, value added sector in the country felt the burden of 100 basis point increase in EFS rate from 8.5% to 9.5%, besides a rise in energy tariffs.  

INCREASE IN THE MINIMUM WAGES:

Government increase minimum wage from Rs.6000 to Rs.7000 which increases the Fixed cost of the textile finished product. Because of this the prices of the textile product Increases and in this way the Pakistan textile products not compete with the neighbouring Countries prices. In result ultimately many textile owners shut down their textile mills.

LACK OF TRANSPORT FACILITIES:

The railway system in Pakistan is in poor condition because of less availability of Locomotive engines, single track and corruption in railway due to this railway is not a Good option to transport the textile product container to Karachi. Last option to transport the container to Karachi port is through trailer which required lot of time to transport from Punjab to Karachi and is expensive than railway charges which increase the prices and Shrink the profit margin of textile mills owners.

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• FINANCIAL PROBLEMS:

For the functioning of any industry the greatest issue has always been the one related to money. Proper financing is very important for the development an industry. Unfortunately, our Textile Industry is facing a lot of financial problems, some of which are domestic issues and global recession.29

Another article by Siddique, Dr. Rizwan, Shaheen, Iffat, Akbar, Waseem and Malik, Maham Asif, ‘Textile Sector is the backbone of Pakistan’s economy. The ills faced by the sector and its contribution towards economic development’ stated some different problems. Those problems are defined below:

• TAXATION ISSUES:

There is no tax on export that discourages the local industry.

Import duty

Withholding taxes

Special excise tax30

• INTERNATIONAL COMPETETION:

The industry is facing competition from other developing countries like Bangladesh, India and China in its major export markets. Also the current recession in the West has resulted in a

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slowdown in demand for textile products. Due to all the other problems faced by the Textile Industry, its production capacity and quality is getting low. So Pakistan is lagging behind its competitors in the sphere of this international and regional competition.31

- ENVIRONMENTAL ISSUES:

While confronting with cutting down environmental burdens, the textile sector of Pakistan will have to face one of the biggest challenges facing of complying with international environmental protocols. Almost every major textile group has its own power plant being run by using fossil fuel, emitting toxic effluent into the air as well as generating major environmental concerns for ground water. Textile processing employs a variety of chemicals. Industrial processes also generate wastewater containing heavy metal contaminants. According to World Health Organization (WHO) the metals of most immediate concern are chromium, Zinc, iron, mercury and lead. Most of these metals are non-degradable into non-toxic end products. Experts say that textile wastewater contains substantial pollution loads and heavy metals.32

The textile industry plays an important role in bringing foreign exchange and providing employment for the country. Though Pakistan has the potential to hold a big share in the textile market but there are a lot of things that do not let the textile industry move forward. Government of Pakistan is not taking any measures or resolving the electricity crises; gas shortage etc. Due to all this export orders are not taken because then the orders are not given on time. Old machinery is being used because new machinery cannot be imported. Old machinery is not sufficient enough and does not reach the mark with the competing countries.

RESEARCH METHODOLOGY

For the secondary research the most relevant articles to this topic have been considered. Within these articles the most useful information was reviewed that justified the question of analysis. The articles that best connected to the research were taken into account. This made the study easier because it gave facts which were essential for the research to be carried out.

This research is based on qualitative analysis for which the information has been gathered from various articles from the internet, reports, books and different newspapers. Although a lot of effort has been made to find the proper reasoning to the dissertation question but a proper answer has not been concluded.

The main focus of secondary research is based on articles, books and reports. Some of them being 'THE 2011 IMPORT AND EXPORT MARKET OF WOOL IN PAKISTAN' a document provided by Icon group international, 'WOOL GROWING AREAS EXPERIENCED GOOD CONDITIONS' by Pakistan textile journal, ‘GRADING AND MARKETING OF WOOL’ by Dr Rao Zahid Abbas, Dr Zafar Iqbal & Dr Kashif Saleemi, ‘THE INTERNATIONAL WOOL TRADE’ a book written by Julian Roche, a report ‘NATIONAL COORDINATED RESEARCH AND DEVELOPMENT PROJECT FOR THE IMPROVEMENT OF WOOL QUALITY’ prepared by Pakistan Agricultural Research Council in the year 2002, an article ‘PRODUCTION OF TEXTILE FIBRES AND CONSUMPTION TRENDS’ by Dr. H.R.

Sheikh, Professor Emeritus, Textile Institute of Pakistan, an article ‘ENVIRONMENTAL FACTOR AFFECTING PRE-WEAVING GROWTH Traits OF HISSARDALE SHEEP IN PAKISTAN’ written by P.Akhtar, Z. Ahmad, G. Mohiuddin, S. Ali and K. Javed, a report on ‘THE TEXTILE INDUSTRY OF PAKISTAN’ and another article by Siddique, Dr. Rizwan, Shaheen, Iffat, Akbar, Waseem and Malik, Maham Asif, ‘TEXTILE SECTOR IS THE BACKBONE OF PAKISTAN’S ECONOMY. THE ILL FACED BY THE SECTOR AND ITS CONTRIBUTION TOWARDS ECONOMIC DEVELOPMENT’. And a few others are also mentioned.

The research was carried out by interviewing people who are closely linked to the wool sector of Pakistan, mainly the importers and exporters, people who could answer the relevant questions, people who were well aware of the exports and imports of wool. The main interviews were conducted with the partner and director MR. Obead Farouk of Pakistan wool and hair association and with the proprietor of wool skin MR.Abdul Rahim. The most authentic sources were interviewed as to provide first hand reliable information. A number of renowned personalities involved in the import and export of wool were interviewed to attain information that is required to complete this research.

The interviews integrated queries linked to the topic with the people directly connected to import and export of wool. It was made sure that the information was first hand and not false. The interviews include questions regarding the export and import of wool, associations related to the export and import of wool? What kind of quality does Pakistan export and import? What is Pakistan’s local wool consumption? Does Pakistan wool meet the requirement of international market? What kind of wool does Pakistan export? And many other questions related to the topic.

42 Interview Conducted With Mr. Obead Farouk. At Pakistan Wool And Hair Association Office. On May 23. At 2:30pm.
43 Interview Conducted With Mr. Abdul Rahim. At His Office. He Is A Proprietor At Wool Skin. On May 25. At 3:55pm.
were asked to collect the best information. The questions were asked in detail though they were open-ended as to achieve the best possible answer. Those questions were asked which might give maximum sum of information about the research which was being carried out.

The interviewee answered the questions in great detail which was helpful and confusing at the same time because there was a lot of irrelevant information which was not important for the research. Which was later edited and only essential bits and pieces were joined together to formulate a proper interview.

Qualitative method was best suited for this dissertation because a lot of interviews were conducted with people face to face, so it was better to have a one on one session with the interviewee rather than passing on questionnaires, it’s much easier to understand what the interviewee is trying to say rather than them filling questionnaires.

These methods of research were important to discover the answers to the problems the research was facing. Above mentioned methods made it easy to compile the research together, though it’s still open ended but the reader can tell where the problem arises and what the root cause is. The information received from the interviewee’s connected the missing dots, completing the gaps in the information collected though secondary research. This formed the basis leading to the conclusion to this dissertation.
FINDINGS AND ANALYSIS

Pakistan textile industry is the 4th largest exporters of the world and most of our revenues are received from this source. As mentioned earlier in the literature review an article written by Dr Rao Zahid Abbas, Dr Zafar Iqbal & Dr Kashif Saleemi, ‘GRADING AND MARKETING OF WOOL’, talks about the quality reputation based on the improper care of the fleece, and other different problems, wool is damaged and sold in less price. The buyer gives less money because of the quality of wool.44

Due to poor quality most of the buyers refuse to buy such quality of wool. First class wool is exported and if such quality is produced it cannot be exported.

Our exports and imports both have decreased over the time. If the government takes measures a lot can be improved. Exports and imports can bring in a lot of revenue for the developing country.

Pakistan produces large variety of wool. Pakistani wool is ideal for carpet weaving. The best variety comes from Baluchistan and cholistan.45

Though Pakistan can produce one of the best qualities of carpet wool but due to quality issues it does not remain the best quality and so in the international market everyone is aware of the problems Pakistan faces.

According to a lot of reports and articles Pakistan’s wool imports and exports have fallen during the recent years.46 It is mainly because of the problems faced by the textile sector, also because the sheep rearing is not done with proper methods farmers are not given proper training as to how sheep’s should be reared.

Over the time the exports have fallen due to a number of reasons. Some of them being, fall in sheep population, fall in the global demand for woollen products- the year 2008 witnessed significant decline in exports across different categories, availability of wool in desired quantity and quality and use of old machinery/out dated processing technology.  

According to weekly news, a magazine had an article, ‘RAW WOOL LOSING GLOBAL BUSINESS’ which stated about the Pakistani export of raw wool. The article was published on Dec 18 - 24, 2000. The publisher spoke about Pakistan losing its name in the international wool market due to heavy lifting of raw wool by Afghan carpet makers who have forced them to cut production.

Other than this lack of incentives like export refines facility leave them unable to compete with their rivals price and product wise.

"We are losing market shares in the United Kingdom, China, Belgium, Japan and India very rapidly due to our uncompetitive prices," said vice chairman, Pakistan Wool and Hair Exporters Association (PWHEA), Amanullah Farouq. He said that prices of wool, currently offered by

http://texmin.nic.in/policy/Fibre_Policy_Sub %20Groups_Report_dir_mg_d_20100608_5.pdf


51 Amanullah Farouq the Vice Chairman Of Pakistan Wool And Hair Exporters Association (PWHEA).
New Zealand, which were expensive as compared to Pakistan, has fallen in the last few years, making our prices unattractive in the global markets. 52


Vice chairman of Pakistan Wool and Hair Exporters Association (PWHEA), Amanullah Farouq54 spoke about how wool export was falling over the period of time. He spoke about the drawbacks and why this was happening.55

Pakistan spends money on importing wool, why can’t Pakistan use the same wool they produce? Wool that is produced in Pakistan is mainly of carpet quality but it’s not that other kinds of wool cannot be produced here.

My research started by interviewing people who are closely linked to the wool sector, mainly importers and exporters of wool and people who could answer the relevant questions. I interviewed a number of renowned personalities involved in the import and export of wool.

While speaking to the manager56 at Abdul Rauf and Co. (Abdul Rauf and Co. is a company that deals in the export and import of wool), I realized that people working in the same factory have different views. I interviewed two different workers from the same factory but both of them had different opinions.


54Amanullah Farouq The Vice Chairman Of Pakistan Wool And Hair Exporters Association (PWHEA).
55Amanullah Farouq The Vice Chairman Of Pakistan Wool And Hair Exporters Association (PWHEA).
56Manager of Abdul Rauf And Co. Interviewed At Abdul Rauf And Co. In April 2012.
Firstly he spoke a little about the background of how sheep is raised and what all is required for the best quality wool (example environment, food etc.) then further on he spoke about what quality wool is exported and imported from Pakistan and what quality Pakistan requires the most. He spoke about the drawbacks and how government is not taking any incentives to improve the wool sector for it to get ample amount of revenue for the country.

The other worker (who worked under the manager) I interviewed was not keen on giving me a lot of information and when I asked him why he claimed that he does not want to give any information which is not supposed to be given. But he had his own views which he shared with me. This worker spoke about the farmers and how they have less money and they cannot take care of the sheep’s in the money they earn due to which they tend to lose sheep’s, the wool produced is not of good quality since good care is not taken and usually sheep is attacked by fleece and the farmers have to face a lot of difficulties. He also spoke about how the middleman keeps a lot of money after the deal is finalized.

Both the workers had different things to tell me. These workers had formed their opinions on the basis of their personal research in this regard.

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57 Manager of Abdul Rauf And Co. Interviewed At Abdul Rauf And Co. In April 2012.
58 Manager of Abdul Rauf And Co. Interviewed At Abdul Rauf And Co. In April 2012.
59 Manager of Abdul Rauf And Co. Interviewed At Abdul Rauf And Co. In April 2012.
60 Worker Who Worked Under The Manager At Abdul Rauf And Co. Interviewed At Abdul Rauf And Co. In April 2012.
61 Worker Who Worked Under The Manager At Abdul Rauf And Co. Interviewed At Abdul Rauf And Co. In April 2012.
62 Worker Who Worked Under The Manager At Abdul Rauf And Co. Interviewed At Abdul Rauf And Co. In April 2012.
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67 Worker Who Worked Under The Manager At Abdul Rauf And Co. Interviewed At Abdul Rauf And Co. In April 2012.
68 Worker Who Worked Under The Manager At Abdul Rauf And Co. Interviewed At Abdul Rauf And Co. In April 2012.
Another interview was conducted with the manager of JJ international (JJ international is a company that deals with the export and import of wool). The manager\textsuperscript{69} spoke about how government should announce some incentives to encourage sheep farming in the country as only due to high prices of wool in the country carpet export has fallen down.\textsuperscript{70} According to him\textsuperscript{71} the wool market is coming down due to the government. He strongly felt that the committee should be constituted to look into the matter.\textsuperscript{72} According to him this downfall was never witnessed before and is unique in the history of Pakistan.\textsuperscript{73} He also mentioned that “sheep farming should be encouraged to ensure better wool”.\textsuperscript{74} While speaking to him\textsuperscript{75} in detail I found out that Pakistan wool test house is the only department capable of conducting physical, chemical and microbiological tests under the supervision of high trained staff with most sophisticated equipment from abroad.\textsuperscript{76}

After conducting these interviews the next step was to interview MR Obead Farouk\textsuperscript{77} who is the partner and director at Pakistan wool and hair export association.

While talking to Mr. Obead Farouk\textsuperscript{78} I asked him several question regarding the import and export of wool because he partially owns Pakistan wool and hair export association. He\textsuperscript{79} was one of the most import interviewee of my dissertation. He\textsuperscript{80} had facts which I could not collect from anyone. So I started my interview by asking him\textsuperscript{81} about the wool trade bodies of Pakistan, he told me that ‘the wool trade mainly comes under the commerce and industry department, previously under the health department, he further added by saying that it is associated with the

\textsuperscript{69}Manager of JJ International. Interviewed At JJ International Factory. In April 2012.
\textsuperscript{70}Manager of JJ International. Interviewed At JJ International Factory. In April 2012.
\textsuperscript{71}Manager of JJ International. Interviewed At JJ International Factory. In April 2012.
\textsuperscript{72}Manager of JJ International. Interviewed At JJ International Factory. In April 2012.
\textsuperscript{73}Manager of JJ International. Interviewed At JJ International Factory. In April 2012.
\textsuperscript{74}Manager of JJ International. Interviewed At JJ International Factory. In April 2012.
\textsuperscript{75}Manager of JJ International. Interviewed At JJ International Factory. In April 2012.
\textsuperscript{76}Manager of JJ International. Interviewed At JJ International Factory. In April 2012.
\textsuperscript{77}Mr. Obead Farouk. The Partner and Director At Pakistan Wool And Hair Exporters Association (PWHEA).
\textsuperscript{78}Mr. Obead Farouk. The Partner and Director At Pakistan Wool And Hair Exporters Association (PWHEA).
\textsuperscript{79}Interview Conducted With Mr. Obead Farouk. At Pakistan Wool and Hair Association Office. On May 23. At 2:30pm.
\textsuperscript{80}Interview Conducted With Mr. Obead Farouk. At Pakistan Wool and Hair Association Office. On May 23. At 2:30pm.
\textsuperscript{81}Interview Conducted With Mr. Obead Farouk. At Pakistan Wool and Hair Association Office. On May 23. At 2:30pm.
animal health and quarantine department and requires certification from these departments for exporting wool’. 82

A long discussion was carried out on the trade bodies after which I asked him about the associations related to the export of wool from Pakistan, he 83 said from Karachi its Pakistan wool and hair export association. 84

He 85 went on talking about the quality of wool that Pakistan produces, according to him, 86 ‘roughly the Pakistani clip of wool produces 20,000 tons unwashed (greasy) wool annually. Mainly carpet grade coarser wools are produced in Pakistan, due to the harsh terrain these sheep’s are raised in. 87 He 88 said 8 months of the year yellow wool is produced and 4 months of the year white wool is produced (April - July ).’ 89

Next he told me about the local wool consumption, which according to him is very low. 90 He 91 did not provide me with a percentage or a figure due to security reasons. Further on I asked him 92 if Pakistan was meeting the international requirements which other countries are seeking for, according to Mr. Obead Farouk 93 ‘Pakistan is not able to meet international requirements due to...

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82 Interview Conducted With Mr. Obead Farouk. At Pakistan Wool and Hair Association Office. On May 23. At 2:30pm.
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92 Interview Conducted With Mr. Obead Farouk. At Pakistan Wool and Hair Association Office. On May 23. At 2:30pm.
93 Mr. Obead Farouk. The Partner and Director At Pakistan Wool And Hair Exporters Association (PWHEA).
lack of government support. They do not have proper testing which should provide us certificates required for international exports. He spoke a lot about how government should support these proper testing certificates required for international exports, he said because of this most of our exports don’t take place. He was really upset about the face that one of the main reasons behind less export was that the Pakistani government is not supportive.

My next question to him was about the kind of wool that Pakistan exports, he said ‘Our local breeds are all carpet grade wools, usually 34+ microns. Although some of our northern areas produce finer wools, quantity for these is negligible. We export clipped wools (cut of live animals) and tannery wools (pulled of skins before leather processing hence dead animals). Our best quality wools come from Baluchistan areas, followed by Punjab and lastly Sindh.

As the discussion was heating up I asking him about the countries we export wool to, what kind of quality and for what purpose is wool exported? He said that We export to several countries, including India, UK, Belgium, china, France and turkey, mostly for carpets because we produce carpet quality wool. He then spoke about the kind of wool the sheep’s produce in Pakistan are due to the terrain and climate it lives in. hence all our wools are carpet grade.

Then we spoke about the imports of the wool. Mr. Farouk said that wool import is very less in Pakistan. Some quantities are imported from European countries, which are fine, ranging from 24-30 microns. These are usually used to make shawls, woollen caps and some hosiery.

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94 Interview Conducted With Mr. Obead Farouk. At Pakistan Wool and Hair Association Office. On May 23. At 2:30pm.
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103 Interview Conducted With Mr. Obead Farouk. At Pakistan Wool and Hair Association Office. On May 23. At 2:30pm.
104 Mr. Obead Farouk. The Partner And Director At Pakistan Wool And Hair Exporters Association (PWHEA).
105 Interview Conducted With Mr. Obead Farouk. At Pakistan Wool and Hair Association Office. On May 23. At 2:30pm.
According to him the imports are very less and this is also due to our country being a developing country, imports become really expensive and Pakistan is not capable of handling such expensive imports. He also mentioned that our exports are more than out imports.

The next interview was conducted with another well known person from the wool sector. His name is Mr. Abdul Rahim and he is a proprietor at woolskins. He is directly linked to Pakistan wool and hair exports. Mr. Rahim is Mr. Obead’s nephew.

He somewhat spoke more like Mr. Obead. Their ideas matched maybe because they have been in the same business. Mr. Rahim said the same thing Mr. Obead mentioned that Pakistan’s wool imports are less than Pakistan’s exports.

He gave the same reasoning and said that due to the government not taking measures and not putting in money this sector’s import was falling day by day. International market is not willing to import wool from Pakistan due to quality reasons.

According to Mr. Obead Farouk and Mr. Abdul Rahim Pakistan’s imports are less than the exports. This was mainly due to Pakistan not having enough money to support our import sector. Their statement contradicted with the statement I made.
Each time a new person was interviewed more and more information was gathered. But all this information does not always connect because people start giving their own views and how they feel about the import and export of wool rather than giving an ethical answer.

Mr. Obead Farouk\textsuperscript{118} and Mr. Abdul Rahim\textsuperscript{119} had the same views and repeatedly mentioned that the growth of Pakistan’s wool export and import has stopped due to the government not taking good initiatives and not putting in good money for the imports and exports to last for long.\textsuperscript{120}

Though both of their statements contradicted my statement but they made sense. Pakistan’s wool imports are less than the wool exports and Pakistan has to import wool for other winter apparel and winter wear because Pakistan produces carpet quality wool because of the harsh terrain the sheep’s are raised in.

\textsuperscript{118}Mr. Obead Farouk. The Partner and Director at Pakistan Wool and Hair Exporters Association (PWHEA).
\textsuperscript{119}Mr. Abdul Rahim. Proprietor at Woolskins.
\textsuperscript{120}Mr. Abdul Rahim. Proprietor at Woolskins and Mr. Obead Farouk. The Partner and Director at Pakistan Wool and Hair Exporters Association (PWHEA).
CONCLUSION:

Over the years the export and import of Pakistani wool has fallen. This is due to a lot of reasons. According to people who are closely related to the wool sector, government is not taking any initiative to improve the conditions. Due to this each year the export of wool is declining. The imports with time have also lessened.

Pakistan produces carpet quality wool, so the wool that Pakistan exports is also carpet quality. The wool that Pakistan imports is wool for making apparel and hosiery.

Pakistani carpet industry competes in the international market. Wool importers do not prefer buying wool from Pakistan this is mainly because not much importance is given to farmers who rare sheep’s. The sheep’s are not taken care of due to which the wool which they produce is not of good quality. The wool is damaged due to the sheep’s getting infected by the fleece.

Government should announce some incentives to encourage sheep farming in the country as only due to high prices of wool in the country carpet export has fallen down from $300 to $100million. Sheep farming should be encouraged to ensure better wool. Further on committee should be constituted to look into the matter and enforce immediate measures to stop this escalating trend, which was never witnessed before and is unprecedented in the history of Pakistan.  

A lot of problems were faced while writing this dissertation. Not a lot of information, facts and figures were available in the secondary research because of which I had to face a lot of difficulty in writing this research paper.

The question of my research was that why is Pakistan’s wool imports more than Pakistan’s wool exports and why don’t we use our own wool rather than importing it? But as I got more involved in this topic I figured out that the imports and exports both have declined over the years. This is mainly because no value is given to this sector by the government and at the same time this industry is facing a lot of other issues which can be fixed.

Also because Pakistan only produces carpet quality wool so we have to import wool from different countries in order to manufacture winter apparel and hosiery. So import of wool is important to fulfil the needs of our small factories who manufacture all these winter garments.

We hardly get export orders on winter apparel and hosiery. This is because the wool that is produce in Pakistan is not of good quality and also because of other reasons like energy crises etc, orders are not completed on time. Although the labour is so cheap but the buyer still does not place their orders with Pakistan.

Throughout my research my dissertation question did not contradict until the end, when I interviewed two of the most import people directly associated with the wool export and import, mentioned that both imports and exports have come down in the last few years. But the exports are still more than the imports.

And as I have mentioned all along my dissertation that Pakistan produces carpet quality wool, that’s why we have to import different kinds of wool to manufacture different kind of winter apparel and hosiery.
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APPENDICES

INTERVIEW NUMBER 1:

An interview was conducted with the manager of Abdul Rauf and Co. The interview took place at the factory. In April 2012.

Question: How long have you been in this business?

Answer: I have been in this business for about 10 years now.

Question: Tell me a little about how the sheep’s are raised in Pakistan?

Answer: The sheep’s are not raised properly, no proper training is given to the sheep farmers in Pakistan, due to which excellent quality of wool is not produced here.

Question: What is required for the best quality of wool?

Answer: The sheep’s are suppose to be taken care of, their food has to be proper and the climate is also very important.

Question: What quality of wool is exported and imported by Pakistan?

Answer: Carpet quality wool is produced and carpet quality wool is exported.

Question: What quality of wool is required by international buyers?

Answer: Carpet quality because that’s what Pakistan produces.

Question: What problems are faced and why?

Answer: The biggest problem is that the government is not fair to the wool industry. No measures are taken by the government to improve the wool industry.

INTERVIEW NUMBER 2:

An interview was conducted with a worker working under the manager at the same factory (Abdul rauf and co.) this worker did not talk a lot because he was scared of giving out false or too much information which was harmful for their factory.
Question: are the farmers not satisfied with what they earn? Is it a problem for the wool industry?

Answer: yes the farmers are not satisfied with what they earn, due to which sheep’s are not raised properly.

Question: is the wool produced by Pakistan not of good quality?

Answer: yes it is not of good quality because the sheep’s are not kept well. They usually get infected by fleece, which harm the wool and a lot of difficulties are faced.

Question: is there a middle man when the wool if sold by the farmer? Does he keep most of the money?

Answer: yes there is a middle man in almost all the deals which is one other reason for why the farmers do not earn good money.

INTERVIEW NUMBER 3:

The third interview was conducted with the manager of JJ international. The interview was conducted at the factory of JJ international in April 2012.

Question: is the government helping the woollen industry?

Answer: No it is not, Government should announce some incentives to encourage sheep farming in the country.

Question: Do u think the downfall is due to the government?

Answer: Yes the downfall is mainly due to the government. According to him a committee should be formed to look into this matter.

Question: was this downfall ever witnessed?

Answer: no this downfall was never witnessed.

Question: should sheep farming be encouraged in Pakistan?

Answer: yes sheep farming should be encouraged to ensure that better quality wool is produced.
He spoke about the Pakistan wool test house. He said that Pakistan wool test house is the only department which is capable of conducting physical, chemical and microbiological test under the supervision of high trained staff with most sophisticated equipment from abroad.

**INTERVIEW NUMBER 4:**

An interview was conducted with Mr Obead Farouk who is the partner and director at the Pakistan wool and hair association. This interview was conducted at the Pakistan wool and hair association office on May 23rd at 2:30pm.

**Question:** I would like to know little about the wool trade bodies (Pakistan).

**Answer:** The wool trade mainly comes under the commerce and industry department, previously under the health department. It further is associated with the animal health and quarantine department and requires certification from these departments for exporting wool.

**Question:** associations related to the export of wool in Pakistan.

**Answer:** The Pakistan wool and hair exporters association.

**Question:** what kind of wool quality does Pakistan produce for export and what kind of quality is required?

**Answer:** the Pakistani clip of wool produces 20,000 tons unwashed (greasy) wool annually. Mainly carpet grade coursers wools are produced in Pakistan, due to the harsh terrain these sheep’s are raised in. 8 months of the year is yellow wool, 4 months is white wool.( april - july ).

**Question:** What is our local wool consumption?

**Answer:** Our local wool consumption is very low you can check stats at the federal board of revenue website.

**Question:** Is Pakistan wool meeting the requirements that other countries are seeking for?

**Answer:** no, we are not able to meet international requirements due to lack of government support. They do not have proper testing which provides us with certificates required for international exports.
Question: what kind of wool does Pakistan export?

Answer: Our local breeds are all carpet grade wools, usually 34+ microns. Although some of our northern areas produce finer wools, quantity for these is negligible. We export clipped wools (cut of live animals) and tannery wools (pulled of skins before leather processing). Our best quality wools come from Baluchistan areas, followed by Punjab and lastly Sindh.

Question: what countries do we export wool to?

Answer: We export to several countries, including India, U.K, Belgium, china, France and turkey.

INTERVIEW NUMBER 5:

The last interview was conducted with another well known person from the wool sector. His name is Mr. Abdul Rahim and he is a proprietor at woolskins. This interview was conducted in his office.

Mr Abdul Rahim and Mr Obead Farouk are linked together. He almost said the same things as Mr. Obead said.

Question: Is our import more or export?

Answer: imports are less than our exports.

Question: what is the reason?

Answer: Pakistan does not have enough money to support our import sector.

Question: what kind of wool does Pakistan produce? only carpet quality? And what's the reason behind us not producing any other kind of wool?

Answer: The kind of wool the sheep produces is due to the terrain and climate it lives in. Hence all our wools are carpet grade.

Question: what kind of wool do we import, from which countries do we import and for what purpose?
Answer: Wool import is very less in Pakistan. Some quantities are imported from European countries, which are fine, ranging from 24-30 microns. These are usually used to make shawls, woollen caps and some hosiery (sweaters) etc.

Question: Is our import more than our export?

Answer: Export is more.

Question: how much revenue do we get out of wool export each year?

Answer: Check up stats on fibre website.

Question: in terms of money how much do we spend on importing wool? And how much revenue do we get in exporting wool?

Answer: Check stats.