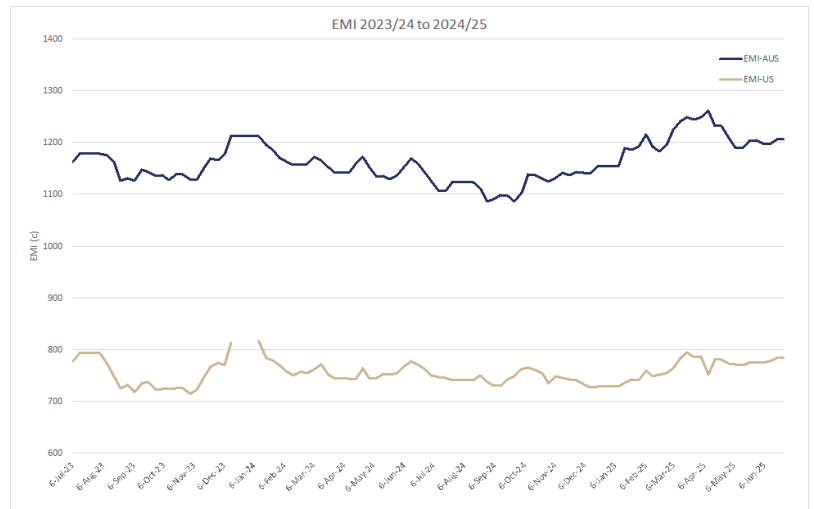


# Weekly Wool Market Report

**Week S09: 27/08/2025:** The AWEX EMI closed on 1261c up 14c at auction sales in Australia this week. The EMI posted 7c rises over both selling days with the EMI in USD terms also rising 14c for the week. The national offering fell back to 29,304 bales for the week with Fremantle offering on Tuesday only. 94.6% of the offering was cleared to the trade with the northern region passing in 2.4% whilst southern region pass in was 6% and the West 11.3%. Exporters and (Indents) mill buyers were intent to continue their positive approach to buying, and most grower sale lots achieved returns of 10 to 20c over the previous week's levels. The EMI has added 53c over July and

August posting the 6<sup>th</sup> consecutive weekly rise and the 10<sup>th</sup> in a run of daily rises this week. Brokers are reporting large reductions in receivals over the past month due to "wet weather" however the AWPFC have released their August Forecast with the predicted wool production set to fall 10.2% in the 2025/26 season (from 280 Mkg to 251.5 Mkg). The question is being asked "is the quantity of wool really there?".



**Merino Fleece:** saw the northern markets open up to 30c clean dearer and continue that trend on Wednesday with the 18.5μ and coarser adding another 10-15c. It is still impossible to determine if this week's rise in the US value of wool purchases is driven by confidence emerging throughout the pipeline or fear of the lower production forecast.

MPG North	Percentile 10y	27/08/2025	20/08/2025	Variance	5 Year Average	5 year var	5 year % var
17	28.4%	1,752	1,733	19	1,986	-234	-11.8%
18	35.9%	1,672	1,633	39	1,731	-59	-3.4%
19	36.5%	1,542	1,531	11	1,526	16	1.1%
20	58.0%	1,492	1,475	17	1,369	123	9.0%
21	63.2%	1,472	1,464	8	1,310	162	12.4%
22	68.5%	1,466	1,454	12	1,270	196	15.5%
30	55.0%	440	433	7	350	90	25.7%
EMI	37.5%	1,261	1,239	22	1,241	20	1.6%

**Merino Skirting:** Whilst the FNF Best broken types added 10-20c for the week the prices for the main types did not follow dearer prices for the fleece types however the market was fully firm across the range of types and VM content.

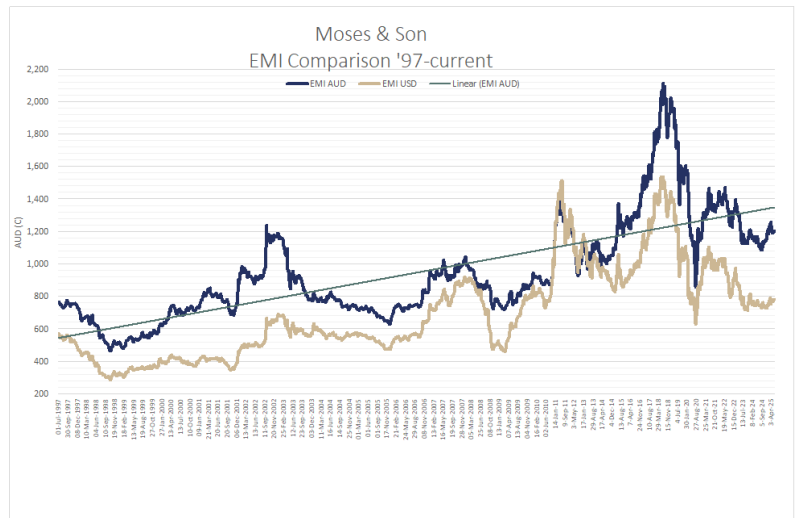
**Crossbred:** saw steady rises across the micron range in all centres. The highlight for this sector emerged on Wednesday where vigorous competition for 25.5-micron fleece types forced prices up to 40c dearer for the day. Given the XB sector has seen YOY rises between 25% and up to 40% in some MPG's, the projection for this sector is for a slight retracement in price over the next month but nothing to be alarmed about.

**Merino Cardings:** saw another uneventful week with price levels remaining firm. Buyers favoured the best bulk and colour for their combing orders however the Carbonising types remained unchanged.



# Weekly Wool Market Report

**Next week:** offering remains under 30,000 with 29,743 bales on offer across all centres Tuesday and only Sydney and Melbourne offering on Wednesday. The market intelligence emerging from this week is that despite the Chinese processors continually challenging the current cost of wool and the absence of Indian and European competition the market should maintain these levels in the short term. ~ Marty Moses.



Region	Centre	27/08/2025	20/08/2025	Variance	Bales Offered	Bales Sold	Pass-in%	Next Sale Offering
Northern	Sydney	1,297	1,281	16	10,860	10,601	2.4%	10,408
Southern	Melbourne	1,237	1,225	12	14,216	13,369	6.0%	15,744
Western	Fremantle	1,402	1,396	6	4,228	3,752	11.3%	3,591
National	AWEX EMI	1,261	1,247	14	29,304	27,722	5.4%	29,743

## Moses & Son Top Price Report

Description	District	Micron	VMB	Yield	SL	SS	Price
AAAA M	Crowther	16.9	0.6	75	77	48	1323
AAA M	Temora	16.3	1.1	68	81	45	1244
AAAA M	Beckom	17.6	0.5	70.4	81	39	1209
AAAA M	Temora	17.4	0.4	69.3	72	51	1197
AAA M	Temora	15.4	1.3	65.5	64	50	1190

## Mulesing Declarations

NM	5,754	19.6%
CM	593	2.0%
AA	11,824	40.3%
Totals	18,171	62.0%
Total weekly offering		29,304