

**Q3 / 2025–2026**

## Welcome to the AWEX Update

We are operating in increasingly volatile times, with the war in Iran adding another layer of global instability just when industry confidence had been showing signs of recovery. Higher fuel and fertiliser costs are set to compound on farm cost pressures, while market and broader economic uncertainty is likely to weigh on decision making across the supply chain. The wool industry, as one of the most trade exposed sectors of the Australian economy, will need to be careful in navigating through this current environment.

The critical role that AWEX plays in wool market reporting often flies under the radar but has never been so important to informing all sectors of the wool supply chain during these uncertain times. The team at AWEX has been busy addressing queries about all aspects of the wool market and in doing so, helping to shape the strategic decisions of wool growers, brokers, exporters and international buyers. This service continues to be a critical tool for risk management, investment planning, and understanding the broader economic health of the textile industry.

AWEX was also proud to recently release an updated version of WoolClip that includes powerful new features that will enhance the usability and functionality of this tool. This update, combined with the rollout of a new WoolClip training program for brokers, will be critical to fast tracking the take up of WoolClip and further embedding the Australian wool industry into the digital age. These programs and features will be discussed in more detail later in this newsletter.

AWEX is conscious that we must be agile in these volatile times, just as your businesses are being required to adjust to the changing environment. As always, we welcome your feedback on how AWEX can improve the services that give confidence in the quality and integrity of Australian wool.

*Charlie McElhone, CEO*



For more information please contact AWEX at [info@awex.com.au](mailto:info@awex.com.au)



## WoolClip Uptake Continues to Accelerate

### Growing adoption across the industry

**WoolClip adoption continues to build across the industry, with strong growth in both user activity and share of the Australian wool clip.**

In the 2025 season to date, WoolClip has delivered:

- Over 300 new Farm Accounts
- Over 3,300 Jobs created
- Nearly 14,000 Mobs captured
- Over 240,000 bales digitally captured

This sustained activity reflects increasing confidence in WoolClip as the industry's digital wool specification platform, supporting more efficient data capture, improved accuracy, and enhanced traceability.

WoolClip now represents 22.5% of the Australian wool clip year-to-date, up from 20.0% at the same time last year — a 12% year-on-year increase.

This continues a clear upward trend in adoption, with uptake more than quadrupling since 2021. With more than one in five Australian wool bales now captured through WoolClip, digital specification is increasingly becoming standard practice across the industry.

## Building Supply Chain Momentum

### Driving efficiency, integrity and traceability

**The continued uptake of WoolClip reflects its growing role in supporting:**

- Accurate and consistent wool specifications
- Reduction of errors and duplication
- Integration with key industry systems, including eBale and AWSS
- Improved traceability and data integrity from farm to sale
- More efficient workflows for growers, Classers, and selling agents

As adoption increases, WoolClip is strengthening the industry's ability to meet evolving market expectations around transparency, traceability and digital data exchange — while delivering practical, day-to-day operational benefits.

# WoolClip Excellence Program

## Exclusive Training for Selling Agents

The WoolClip Excellence Training Program is now live – a learning pathway for wool selling agents to build capability and confidence in Australia’s digital wool specification platform.

AWEX has invited all selling organisations to consider sending staff to one or more courses, offered as public (open) or private (company-only) sessions.

With support from the Australian Government’s National Agricultural Traceability Grants Program, reduced course fees will apply until June 2026.

### Upcoming Public Course Dates

Secure your place

Level	Location	Date/s
Level 1	Adelaide SA	April 15
Level 1	Dubbo NSW	May 7
Level 2	Dubbo NSW	May 7–8
Level 1	Tamworth NSW	May 28
Level 1	Fremantle WA	June 1
Level 2	Fremantle WA	June 4–5
Level 1	Tottenham VIC	June 18
Level 2	Tottenham VIC	June 18–19
Level 1	Yennora NSW	June 2
Level 2	Yennora NSW	June 2–3

### What Participants Are Saying

*“Of all the short courses I have done over the years, this WoolClip Excellence Program has been by far the most enjoyable, proactive program to date. Absolutely loved it. I am so excited to put all this into practice, promote and educate more. I hope all participants enjoy it as much as I did.”*

**Kelli, WoolClip Expertise graduate**

### Two Training Levels Available

Flexible options to suit different experience levels

#### Level 1 WoolClip Essentials

An introduction to WoolClip, suitable for all personnel (approx. 4.5 hours).

#### Level 2 WoolClip Expertise

Advanced WoolClip skills, equipping key staff to support teams and clients (approx. 1.5 days).

### Get Involved – Book Now or Explore Tailored Training

**Ready to get started?** Secure your spot in the next available session – or contact us about tailored training for your organisation. [woolclip@awex.com.au](mailto:woolclip@awex.com.au)





# WoolClip Release Roadmap

## App updates improving usability and flexibility

### March 2026 Update

#### More control over data and improved functionality

The growth in WoolClip means more users are accumulating Jobs over time and this means more data on each users mobile App. In addition, there are some users with very large Jobs (>500 bales) not all of which are required locally.

The major feature in the March release gives users control over how much data is stored on their mobile app via a per-Job setting. Users can nominate ALL, NONE or NOT ON SPECI, with this setting applying per user, per Job.

In addition,

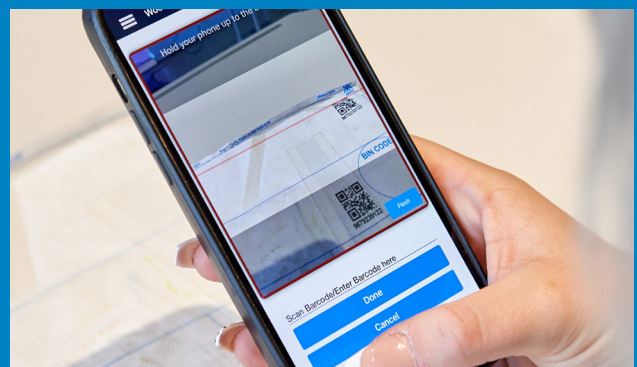
- Improved visibility, alerts and update functionality for stencil numbers on classed bales.
- Android users should notice improved access to buttons.
- A new Agent Admin function allows Marketing Representatives to Unfinalise Specifications and re-request NWDs if required (available to approved graduates of the Level 2 WoolClip Excellence Training Program).
- Ability to update bales with eBaleID after they have been added to a Specification.

### May–June 2026 Update

#### Enhanced grower, NWD and AWSS integration

The May release includes significant enhancements across Farm Account, NWD, PIC and AWSS functionality. These include:

- SMS notifications to Farm Account owners allowing quick response authorisation of WOOL-ID.
- Updated Grower forms (Job Add, Mob Add, and NWD) with additional Grower-specific fields such as PICs and Quality Schemes.
- Ability for Mobs to be assigned different PICs (where more than one PIC exists on a Job).
- Full integration with the AWSS registration system, including a new AWSS Status Tab.





## Certification in the Global Wool Market

### Why multiple certification models exist – and where AWSS fits

**The global wool market's growing focus on sustainability, verification, and traceability has led to a wider range of certification programs designed to service different supply chains, markets, and commercial models.**

Some certification systems operate within closed or vertically integrated supply chains, where wool is contracted and sold directly to specific brand partners. Others, including the Australian Wool Sustainability Scheme (AWSS), are designed to also operate within the open auction system — allowing certified wool to remain accessible to all buyers, while still delivering robust, independently audited credentials.

AWSS continues to be Australia's preferred certification framework, built specifically for Australian wool growers and leveraging existing industry infrastructure — including quality clip preparation and digital tools eBale and WoolClip — to enable traceability and integrity from farm through to first-stage processing, including wool sold through auction.

### More Than One Way to Certify Sustainable Wool

#### Different pathways suit different businesses

As global expectations increase, it is important to recognise that no single certification framework is the only “ethical” or “evidence-based” sustainable wool production credential. Multiple credible options exist, each contributing to improved transparency, accountability, and market access for growers.

Australian producers are global leaders in low-emissions food and fibre production, and Australian wool growers continue to produce the world's best wool, with the highest level of environmental sustainability, animal welfare, and ethical production systems.

AWEX remains committed to recognising grower's leadership in this space and ensuring Australian wool growers have access to a certification system that is practical, credible, and scalable — supporting participation in both existing and emerging markets, while maintaining the integrity and accessibility of the auction system that underpins our industry.

# AWSS Auction Premiums – Season 2025

## Certified wool continues to outperform, but premiums are only part of the story

Current auction data shows that wool with a Certified Integrity Scheme (CIS), continues to achieve consistent premiums above the EMI across all microns.

ResponsiWOOL-certified AA wool is also delivering steady premiums, demonstrating value as the only certification currently available to these growers.

**Premiums Are Only One Part of the Equation. Market access, cost and fit also matter.**

Beyond premiums, certification plays a broader role in maintaining access to key markets, supporting brand requirements, and underpinning claims around sustainability, animal welfare, and traceability.

Growers are encouraged to consider certification decisions in the context of their overall business, including costs, operational fit, and market access benefits, noting that premiums alone may not always translate to a net financial gain.

	Season	Micron					
		16	17	18	19	20	21
SW	22	6.60%	10.40%	7.00%	3.70%	3.10%	3.90%
	23	9.80%	6.20%	3.50%	2.20%	0.30%	2.80%
	24	2.30%	4.10%	4.10%	3.70%	1.70%	0.50%
	25	3.80%	4.10%	2.60%	6.10%	2.10%	8.30%
RWS	22	-1.50%	5.60%	7.20%	6.60%	6.60%	3.70%
	23	3.70%	2.90%	2.10%	2.30%	2.70%	2.40%
	24	5.70%	5.50%	5.40%	5.50%	6.70%	6.60%
	25	6.40%	5.90%	6.10%	7.60%	8.50%	8.80%
Others NM/CM	22	1.10%	2.40%	1.60%	1.20%	0.80%	0.30%
	23	1.00%	1.70%	0.70%	0.40%	0.40%	0.00%
	24	2.00%	1.00%	0.90%	0.30%	0.50%	0.50%
	25	1.90%	0.70%	0.70%	0.40%	0.40%	0.40%
RE	22	2.00%	3.60%	2.40%	2.60%	0.00%	-0.50%
	23	2.90%	2.80%	1.80%	1.30%	1.00%	0.80%
	24	2.50%	1.10%	1.90%	0.60%	0.20%	0.30%
	25	1.60%	1.30%	1.20%	1.50%	0.30%	
Others (AA/PR)	22	-0.60%	0.00%	-0.10%	0.30%	0.50%	0.20%
	23	0.50%	0.40%	0.30%	0.30%	0.20%	0.10%
	24	0.10%	0.10%	0.10%	0.30%	0.30%	0.30%
	25	0.90%	0.10%	0.30%	0.60%	0.30%	0.10%

## Key Takeaways for Growers

- Certified wool continues to achieve premiums above the EMI.
- Premiums are currently strongest in both broader and finer microns.
- ResponsiWOOL delivers value compared to AA wool alone.
- Premiums should be considered in the context of business impact.

## While certification can deliver price advantages, growers should also consider:

- Certification and audit costs
- Time and admin requirements
- Alignment with existing production systems and business goals
- Required practice changes or opportunity costs

SW+ SustainaWOOL, RWS: Responsible Wool Standard, NM/CM: Declared Non-Mulesed/Ceased Mulesed (uncertified).

RE: ResponsiWOOL, AA/PR: Declared mulesed with pain relief (uncertified).

For AWSS enquiries, please contact AWEX at [awss@awex.com.au](mailto:awss@awex.com.au)

# AWSS Step-Up Bonus Update

## Recognising early adopters and building momentum

Since its launch, the AWSS Step-Up Bonus has played an important role in supporting growers who have chosen to certify their wool under the Australian Wool Sustainability Scheme (AWSS), while also helping to raise awareness of certification across the industry.

To date, the initiative has delivered:



These results highlight strong engagement from a group of committed growers and brokers and reflect the value of targeted initiatives in supporting participation in certification.

The Step-Up Bonus was designed as a catalyst — to recognise early adopters, build momentum in the volume of AWSS Certified wool available to the market, and reinforce the importance of certified wool in meeting market expectations. We believe it has successfully supported these objectives, while highlighting that continued adoption of AWSS will require continued industry collaboration and new approaches to delivering value for growers.



Supporting wool growers who help scale Australia's certified wool supply

## What's Next

As the program approaches its conclusion at the end of the season, AWEX will be working closely with industry stakeholders to explore the next phase of initiatives that support growers and supply chain partners in certifying Australian wool.

Partner brokers with clients that have recently sold or will be selling AWSS Certified wool over the next couple of months, and want to claim the Step-Up Bonus, are reminded to submit their applications for processing.

**AWEX thanks all growers and brokers who have participated in the Step-Up Bonus and contributed to progressing Australia's certified wool offering.**

# Certificate IV Wool Classing Returns to Queensland

## Training resumes after 13-year absence

The Certificate IV Wool Classing course is being delivered in Queensland after an absence for 13 years. State based funding was secured following a wool industry campaign to support enrolments for students based in QLD with training being supplied by TAFE NSW.

Eighteen students attended the first session in Longreach, with two participating online due to recent flooding.

The student cohort includes 5 young woolgrowers, 2 wool brokers, 2 shearing contractors and 11 wool handlers.



They travelled from The Gums, Roma, Mitchell, Wyandra, Muttaborra, Barcaldine, Blackall and Longreach. Anna Ingold and Kayla Garner, trainers with TAFE NSW delivered the first units of the CERT IV Wool classing including a skills assessment of wool handling and wool pressing during visits to operating shearing sheds.

There are four 5-day training blocks supported by regular two-hour online sessions and Teams meetings between blocks with the course scheduled to conclude by the end of October.

# Australia's Best Graduate Wool Classers Shine

## Top graduates compete for the Golden Stencil

Australia's top emerging wool classers were showcased at the 2026 AWEX/TAFE NSW National Graduate Wool Classer Competition, held at the Sydney Royal Easter Show on 7 April. The only competition of its kind globally, it brought together the best 2025 Wool Classing graduates to compete for the industry's highest honour — the "Golden Stencil."



From left to right: Amelia McCrabb, 3rd – Bronze Stencil Winner, Matthew Cox, 1st – Golden Stencil Winner, Amelia Brown, 2nd – Silver Stencil Winner

## National Award Winners

### Recognising excellence in wool classing

- **Golden Stencil:** Matthew Cox, trained by TAFE NSW Kayla Garner
- **Silver Stencil:** Amelia Brown, trained by TAFE NSW Kim Jenkins
- **Bronze Stencil:** Amelia McCrabb, trained by TAFE NSW Kayla Garner
- **DAS Campbell Prize (Top NSW Graduate):** Matthew Cox

The winner's RTO and trainer also received the Dennis Teasdale Perpetual Trophy.

**For more information, please see the full media release.**

## Statistics

The national declaration rate has grown to 79.8%. Premiums and discounts for mulesing status continues to affirm a discount of -8 to -34 cents/kg for Non-Declared (ND) Merino wool.

SEASON	2024	2025	+/-
National Decl. Rate	76.8	<b>79.8</b>	3.0
<b>By Mulesing Status (%)</b>			
NM	22.7	<b>25.1</b>	2.4
CM	2.6	<b>3.3</b>	0.7
LN	0.2	<b>0.1</b>	-0.1
AA	44.5	<b>45.3</b>	0.8
M	6.8	<b>6.0</b>	-0.8
ND	23.2	<b>20.2</b>	-3.0
<b>By State (%)</b>			
NSW	84.3	<b>85</b>	0.7
QLD	86.7	<b>86.2</b>	-0.5
SA	84.1	<b>84.8</b>	0.7
TAS	86.6	<b>88.0</b>	1.4
VIC	77.7	<b>81.1</b>	3.4
WA	58.2	<b>60.4</b>	2.2

Mulesing Status	NSW	QLD	SA	TAS	VIC	WA	Total Bales
NM	30.5	41.7	17.7	52.9	29.0	7.5	<b>201,964</b>
CM	3.0	5.4	4.1	5.9	4.7	1.3	<b>27,002</b>
LN	0.0	0.0	0.1	0.0	0.4	0.0	<b>746</b>
AA	45.9	30.7	54.4	26.5	43.7	44.2	<b>359,401</b>
M	5.8	8.4	8.6	2.7	3.2	7.4	<b>47,968</b>
ND	15.0	13.8	15.2	12.0	18.9	39.6	<b>163,650</b>
Total Bales	<b>392,745</b>	<b>29,641</b>	<b>136,188</b>	<b>29,905</b>	<b>176,303</b>	<b>177,185</b>	<b>800,731</b>
% Declared	<b>85.0</b>	<b>86.2</b>	<b>84.8</b>	<b>88.0</b>	<b>81.1</b>	<b>60.4</b>	<b>79.6</b>

NWD Declaration rates (%) and Mulesing Status by State for Season 2025/26 (as at 30.03.26)

Declaration rates (%) by Mulesing Status and State for Seasons 2024/25 to 2025/26 (as at 30.03.26)

		MERINO						NON-MERINO				
		16	17	18	19	20	21	22	27	28	29	30
<b>NON MULESED (NM)</b>												
Season	2023	19	17	17	7	2	0	0	0	5	4	0
	2024	25	20	9	8	5	0	0	0	5	0	0
	2025	<b>19</b>	<b>16</b>	<b>9</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>5</b>	<b>0</b>
<b>CEASED MULESING (CM)</b>												
Season	2023	0	0	12	5	2	1	0	0	0	0	0
	2024	0	20	8	6	2	0	0	0	2	0	0
	2025	<b>19</b>	<b>15</b>	<b>8</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>MULESED with ANALGESIC and/or ANAESTHETIC (AA)</b>												
Season	2023	0	0	8	5	2	1	0	0	4	4	0
	2024	8	7	7	6	2	0	0	0	2	2	0
	2025	<b>9</b>	<b>8</b>	<b>8</b>	<b>7</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>NOT DECLARED (ND)</b>												
Season	2023	-15	-15	-7	-5	-5	-1	0	-7	0	-1	0
	2024	0	-27	-20	-1	0	0	0	0	-6	-4	0
	2025	<b>-34</b>	<b>-14</b>	<b>-13</b>	<b>-8</b>	<b>-8</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>-16</b>	<b>0</b>	<b>0</b>

Premiums and Discounts for mulesing status as at EOM March 2026

### Not Declaring (ND) continues to attract discounts

During the 2025/26 selling season we continue to see discounts for Non-Declared (ND) wool compared to wool declared as Mulesed (M).

# NWD

## Integrity Program

In February, AWEX called for expressions of interest (EOI's) for the 2026 NWD Industry Consultative Committee (ICC).

AWEX wishes to thank everyone who put forward an EOI and is pleased to announce the 2026 NWD ICC.

### 2026 NWD ICC

- Chris Murphy (Chair)
- Gerard Buchanan
- George Nichols
- Jo Hall
- Rex Bennett
- Ed Storey
- Penny Hartwich

- Mark Bazeley
- Josh Lamb

### AWEX Roles

- Charles McElhone (Non-voting Member)
- Kate Gowdie (Observer)
- Tony Checchia (Secretariat)

## Do you have a suggestion regarding the NWD?

An open call for submissions for the 2026 NWD review will open on April 17, 2026.



## AWEX Key Dates



Wool Classing Competition, Sydney Royal Easter Show .....	April 7
SaigonTex 2026, Vietnam .....	April 8-10
AWEX Board Meeting .....	April 21
Australian Natural Fibres Forum .....	April 28
Australia China Traceability & Certification Workshop .....	June 23
IWTO Congress, Dalang, China .....	June 24-26



# **Auction, Information & Integrity Services Update**

## **Market alignment, tools and capability development**

### **Chinese New Year Recess**

#### **Aligning with global market dynamics**

In February 2026, the Australian wool industry observed a one-week, industry-first recess for the Chinese New Year (Lunar New Year). This break respects the holiday schedule of Australia's largest buying market, and supports a stronger, more concentrated return to market activity.

### **Showfloor Auditor Calibration**

#### **Ensuring national consistency**

AWEX utilised the recent Sale Recess in March to conduct a national calibration workshop for its showfloor team. The calibration of our wool technical audit staff on AWEX-ID and Clip Inspection assessment is an important function to ensure consistency of application, approach and delivery across all selling centres.

### **AWEX-ID Accreditation Courses – Expressions of Interest**

#### **Building capability across the network**

AWEX is planning to offer three courses, one in each selling centre, over the April quarter. This course provides initial training in AWEX-ID use and its application. Expressions of interest are now sought and should be registered with local AWEX Audit staff. This course has a theory component, delivered online, and a practical component, both with assessment. Dates will be finalised once participant numbers are confirmed.

### **AWSS Buyer Partner Insights Report**

#### **Simplifying access to verified AWSS lots**

AWEX has released a new Insights report exclusive to AWSS Buyer Partners. This report provides a pre-sale listing of sale lots fully verified and checked as suitable for AWSS Certification. This removes the need to monitor Alteration Lists, offering a single, consolidated view across all selling centres for easier use on the showfloor.