

Q3 / 2023-2024

Welcome to the AWEX Update

It has been a hectic start to 2024. Industry support and momentum continues for AWEX programs; WoolClip, Wool Classing, NWD and eBale. They are recognised as fundamental to the integrity of Australian wool.

- At the IWTO Congress, Adelaide, 15-18 April, AWEX will launch the Australian Wool Sustainability Scheme.
- The triennial registration of wool classers for 2025-27 will commence in October 2024.

Each of these programs represent an ongoing investment by AWEX in services that add value, strengthen, inform and increase confidence in the quality, integrity and future of the Australian wool industry.

Mark Grave, CEO

Strategy 2023-2027

“Delivering services that strengthen, inform and increase confidence in the quality and integrity of Australian wool”

The 2024 calendar year will see traceability, integrity and sustainability continue to strengthen for the Australian wool industry, as uptake continues to grow in AWEX’s key services and innovations such as WoolClip, eBale and the relaunch of the SustainaWOOL Integrity Scheme.

AWEX People News

Brydie Creagh joined the SustainaWOOL Integrity Scheme team on 8 April 2024 in the newly created role of Program Coordinator – Sustainability and Integrity.

With over 13 years of diverse experience across Western Australia’s agriculture landscape, Brydie has demonstrated a commitment to enhancing agricultural productivity and sustainability through her understanding of production systems, policy, and effective stakeholder engagement. This valuable experience, along with a passion for working with farmers, particularly wool and sheep producers and growing up working with her families self-replacing Merino flock make Brydie the perfect fit to play an integral role in the SWIS program relaunch.

Brydie will be based in the Sydney office.



2024 Sydney Royal Easter Show

Wool Auction

After a break of five years due to COVID and scheduling reasons, the National Auction Selling Committee approved an application from AWEX to sponsor the gazetted S39 Wool Sale at the 2024 Sydney Royal Easter Show.

The purpose of the sponsorship is to give the public an opportunity to see a wool sale (room) in action. All are surprised at the speed of selling and value of wool transacted.

A total of 2,613 lots were offered over the two selling days, with 4.1% passed in. The Sale was well supported by Sydney brokers and buyers.



National Graduate Wool Classer Competition

The 2024 AWEX/TAFE National Graduate Wool Classer Competition was held at the Sydney Royal Easter Show on Tuesday 2nd of April. It was the twelfth running of the highly anticipated national competition, with ten participants travelling from across Australia to compete for the Golden Stencil.

The aim of the competition is to recognise excellence in wool classing and education, and to lift the profile of wool classing as a profession and career opportunity.

We congratulate all participants and are pleased to announce the following prizes.

- i. Gold Stencil: Kellie Gelly from Maroona VIC, trained by Moera Hammond and Brian Kearney and graduating from SCAA SWTI.
- ii. Silver Stencil: Andrew Friend from Tamworth NSW, trained by Pauline Smith and graduating from TAFE NSW.



2024 Competitors L to R: Jessica Sharman Taralga NSW, Emily Morton The Rock NSW, Alycia Redden Maitland SA, Andrew Friend Tamworth NSW (2nd), Kelly Gellie Maroona VIC (1st), Emma Hawkins Mudgee NSW (3rd), Emelia Browne Hay NSW, Hannah Leonard Cleveland TAS, Dejannah Harvey Euabalong NSW, Ben Golland Quirindi NSW.

- iii. Bronze Stencil: Emma Hawkins from Mudgee NSW, trained by Kim Jenkins and graduating from TAFE NSW.
- iv. DAS Campbell prize for top NSW Graduate: Andrew Friend from Tamworth NSW, trained by Pauline Smith TAFE NSW.

Please follow the link to our media release for more information.

[Link: Media Release 3187 2024 “Golden Stencil”](#)

Wool Classing



Wool Classer Registration

At its recent meeting the AWEX Board accepted the recommendations from the Registration Review Committee (RRC) to:

- suspend the registration of two wool classers for misuse of stencil, and
- to place a wool classer on active watch and corrective action for more than one contamination incident.

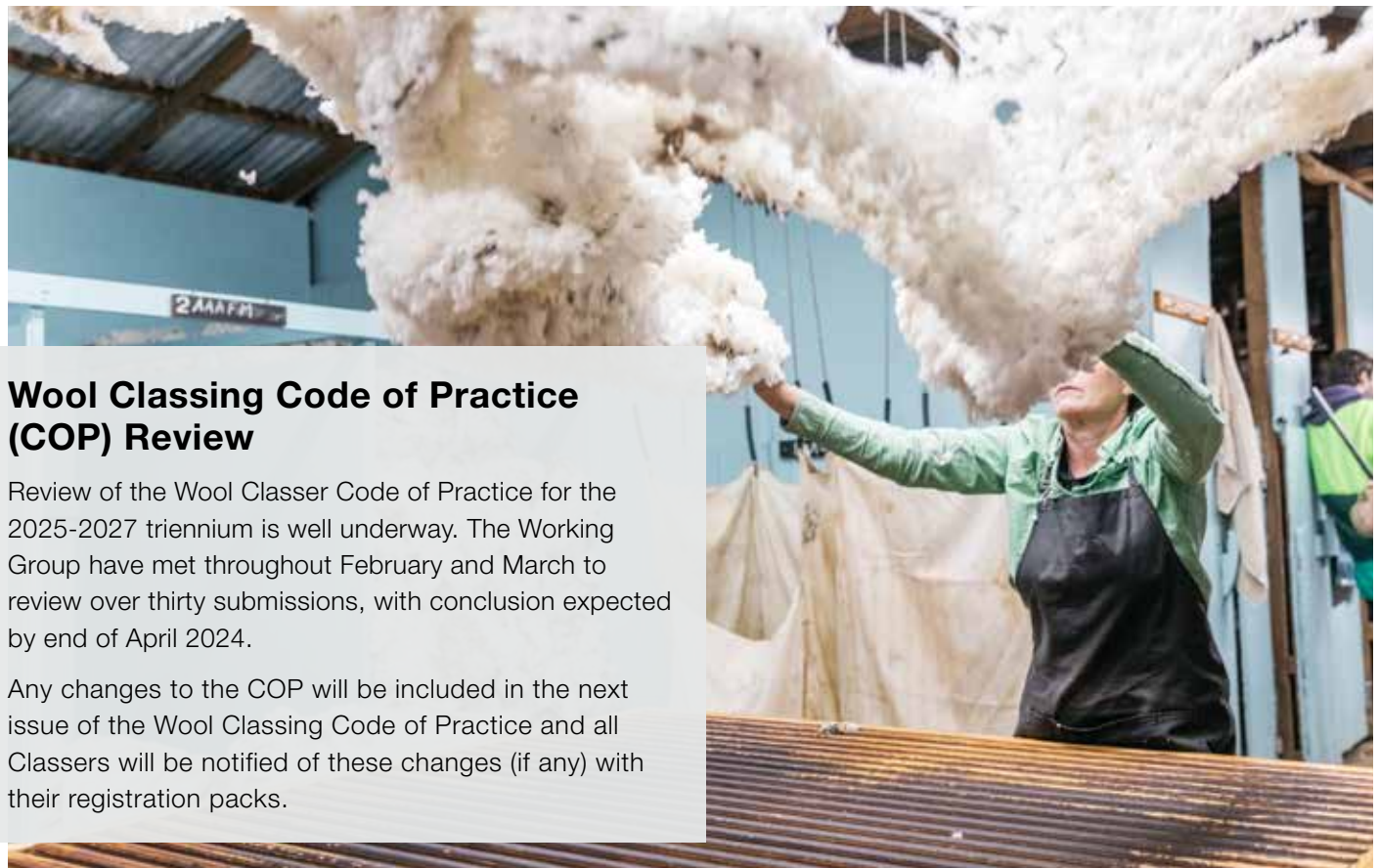
Wool Classers are referred to the RRC where a complaint has been received, or where AWEX believes has established a breach of the Rules of Registration or significant/recurring preparation issues falling below the Code of Practice Standard have been recorded.

The RRC will consider two cases at its next meeting.

Wool Classer Registration Renewals 2025-27

AWEX will invite wool classers to renew their registration for the 2025-2027 period in October 2024. Please keep an eye out for correspondence from AWEX and ensure your contact information is up to date.

Now is a good time to make sure your contact details are correct and up to date to ensure you don't miss out on renewal information.



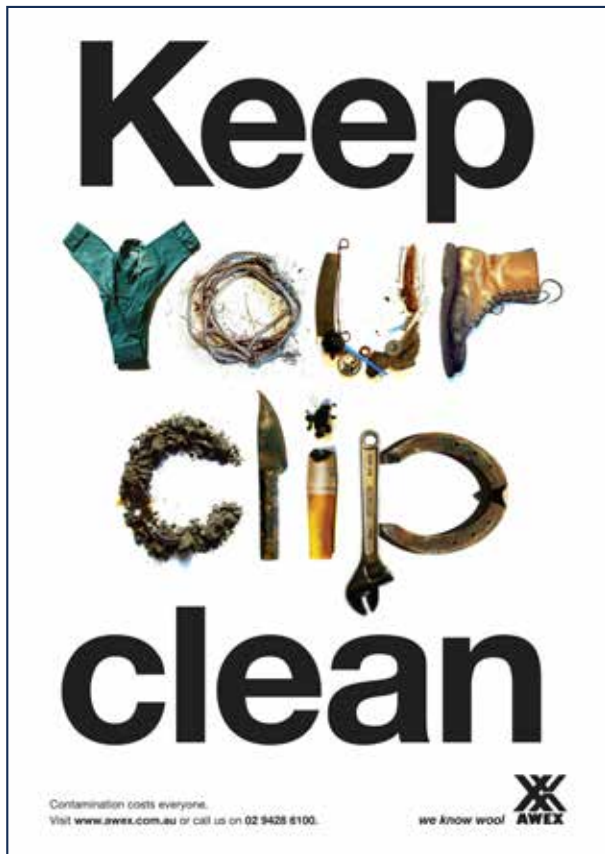
Wool Classing Code of Practice (COP) Review

Review of the Wool Classer Code of Practice for the 2025-2027 triennium is well underway. The Working Group have met throughout February and March to review over thirty submissions, with conclusion expected by end of April 2024.

Any changes to the COP will be included in the next issue of the Wool Classing Code of Practice and all Classers will be notified of these changes (if any) with their registration packs.

For Wool Classer enquiries, please contact (02) 9428 6140 **or email** woolclasser@awex.com.au

Keep Your Clip Clean Campaign Relunched



Contamination costs everybody

The Australian Wool industry has a long and proud history of quality wool clip preparation that is recognised and valued by our customers.

Despite this, clip contamination remains a serious concern. Contamination from items such as twine, bags, cloth, hooks, wire, and tools continue to be an issue that cause havoc in wool processing, either by damaging finetuned specialist equipment, or when processed amongst the wool fibres and contaminating, in some circumstances, an entire batch of woollen product being produced.

In partnership with our global wool processor partners, the Keep Your Clip Clean campaign has been relaunched to raise awareness of the seriousness wool contamination can play in the Australian clip, its impacts, and how we can all help avoid it.

*The **Keep Your Clip Clean** poster has been refreshed, raising awareness of contamination using examples found in wool bales from Australia.*



For a high res copy of the Poster, go to: www.awex.com.au/media/2367/2024-kycc-a2-poster.pdf or contact AWEX (02) 9428 6140 or email woolclasser@awex.com.au

Start the Traceability Journey On-Farm with WoolClip + eBale



eBale wool packs (ePacks) are now readily available in all states and territories across Australia.

With each wool pack now having a unique number, accessed via its QR code or by scanning its RFID tag, eBales are a powerful traceability tool that can start on-farm.

AWEX's WoolClip platform, which digitally captures the Wool Classer's Specification and online NWD declarations, can also capture an eBale's unique ID, by simply scanning the eBale's QR code on-farm in WoolClip.

Doing this in WoolClip is a simple way for growers and Classers to unlock the full potential of eBales including:

- ✓ No duplicate Bale numbers, ever.
- ✓ Avoiding delays, share wool clip details with your chosen marketing organisation instantly.
- ✓ Trusted traceability linked to a unique Bale ID:
 - Online wool specifications
 - Online NWD declarations
 - Capture accurate farm information, including PIC
 - Synergies with digital logistics and warehousing
- ✓ Identification of wool bales in the event of an Exotic Animal Disease outbreak.



WoolClip Success Continues

The uptake and acceptance of WoolClip continues to accelerate in 2024.

This growth continues to be supported by Brokers and Private Treaty Merchants, combined with growing interest from growers and Classers wanting to improve data capture on farm, including the use of eBale.

As eBale and ePacks become more visible throughout Australia, it is expected that interest in WoolClip will grow further. AWEX will continue its extension program for WoolClip & eBale in 2024.

- In 2022/23 a total of 159,279 bales were captured using WoolClip.
 - +81.8% increase on 2021/22,
 - ~8.6% of estimated wool production (WPFC),
- In the recent rolling 12-month period (Apr- Mar 2024) 243,279 bales were captured on WoolClip
 - +79% increase on the same period in 2022,
 - ~14% of estimated wool production (WPFC)

WoolClip Training & Events

These popular sessions allow users to gain confidence using WoolClip and to be able to see firsthand how to create a WoolClip specification and incorporate eBale technology.

Workshops are structured to meet the level of all participants, from those with a high level of technology skills to first time users.

Brokers and Classers are encouraged to contact AWEX to discuss attending a workshop in a location near them.

JUNE

1 Armidale, NSW
 15 Bendigo, VIC
 27-29 Campbell Town, TAS

JULY

8 Port Lincoln, SA
 9 Port Augusta, SA
 10 Port Pirie, SA
 11 Kangaroo Island, SA
 13 Naracoorte, SA
 19-21 Bendigo Sheep Show, VIC
 27 Broken Hill, NSW

WoolClip Support & Resources

To access the current “How To” resources for Classers and for Growers, as well as broker posters and media and how-to guides, please go to;

<https://www.awex.com.au/woolclip/support-and-resources>

If you, your staff or your clients would like to receive training in WoolClip, contact John Cox to arrange a suitable time/date.

John Cox

WoolClip Program Lead

m 0468 533 529

p 02 9428 6100

e jcox@awex.com.au

e woolclip@awex.com.au

WoolClip support is available 7 days a week.



Are you interested in becoming an accredited WoolClip specialist for your business?
 Please contact woolclip@awex.com.au for more information on training options available.

Mulesing Status Statistics

Since last quarter a further 407,316 bales have received, and the national declaration rate has strengthened slightly to 74.5% (Table 4). As we start Quarter 3 of the 2023 selling season the bales offered at auction with a Non Mulesed mulesing status is 239,247 (Table 5), which sits 13.6%

higher than that reported over the corresponding period in season 2022.

Trends in declaration rate and mulesing status (Table 5) continue to remain consistent with reporting across the 2023 season.

Table 4: Season 2022-2023 declaration rate by season and state, as at EOM March 2024.

Season	2022	2023
National Decl. Rate	73.6	74.5
By Mulesing Status (%)		
NM	19.8	21.5
CM	3.2	2.9
LN	0.1	0.1
AA	41.2	41.7
M	9.2	8.3
ND	26.4	25.5
By State (%)		
NSW	77.1	78.0
QLD	86.0	82.3
SA	79.4	78.8
TAS	83.2	85.4
VIC	76.7	77.2
WA	54.2	58.4

Table 5: 2023 Season declaration rate by season and state, as at EOM March 2024.

Mulesing Status	NSW	QLD	SA	TAS	VIC	WA	Total Bales
NM	27.1	40.6	12.8	48.6	25.0	6.7	239,247
CM	3.4	3.1	2.7	7.6	3.0	1.1	31,971
LN	0.0	0.1	0.0	0.0	0.5	0.1	1,327
AA	40.1	30.8	52.9	23.5	44.3	38.1	462,678
M	7.3	7.8	10.4	5.7	4.6	12.5	91,889
ND	22.0	17.7	21.2	14.6	22.8	41.6	283,161
Total Bales	440,059	33,646	174,993	36,385	206,585	218,605	1,110,273
% Declared	78.0	82.3	78.8	85.4	77.2	58.4	74.5

Premiums and Discounts

Table 6: Premiums and discounts for mulesing status as at EOM March 2024.

		MERINO						NON-MERINO				
		16	17	18	19	20	21	22	27	28	29	30
NON MULESED (NM)												
Season	2021	78	77	68	53	51	12		7	5	8	
	2022	25	36	15	17	19	6		0	-2	1	0
	2023	25	19	17	6	5			3	5	5	
CEASED MULESING (CM)												
Season	2021		61	40	31							
	2022		30	14	14	10	6					
	2023			10	8	5	3					
MULESED with ANALGESIC and/or ANAESTHETIC (AA)												
Season	2021		16	12	13	14	1	6	3	5	3	
	2022		19	5	9	6	4		0	0		
	2023			10	3	3			2	5	5	
NOT DECLARED (ND)												
Season	2021		-6	-5	-7	-10	-4		-7	-7	-10	-6
	2022	-39	-28	-24	-2	0	0		-4	-15	-13	
	2023	-17	-16	-9	-6	-5	-1		-7			

NWD Version 10.0 is in effect 1 July 2024

Version 10.0 of the NWD comes into effect 1 July 2024, however all selling agents are encourage to adopt NWD Version 10.0 with your next shearing stationary print.

Please see the AWEX Website for NWD V10.0 forms to be incorporated in stationary orders.

Season 2023/24 Highlights

As we approach Quarter 3, some of the 2023/24 SustainaWOOL season highlights include:

- i. Weekly catalogue compliance monitoring and auditing to ensure sale lots are correctly listed for buyers interested in sustainability.
- ii. SustainaWOOL auction lots accounted for 7.7% of all merino lots offered with lower passed-in rates as well as higher prices paid compared to equivalent fleece wool.
- iii. Completion of more than 40 on-farm inspections to underpin the integrity of the program.
- iv. Relunched program strategy and execution phases for the program transition and relaunch
- v. Engagement and collaboration with key industry stakeholders to strengthen industry interoperability, and align metrics and standards for Australia's sustainable wool global market demands.
- vi. Establishment of the SustainaWOOL Expert Panel created to provide advice and oversight for the Standards, Performance Criteria and data/evidence requirements that underpin the Australian wool industries' on-farm sustainability assurance scheme.

SustainaWOOL Premiums

Table 2: Summarises the premium received for SustainaWOOL bales as a percentage difference from micron price for the 2023/2024 selling season, as at the 4.04.24

Group	Season	16.0	17.0	18.0	19.0	20.0	21.0	22.0
SW Green (NM/CM)	23	10.8%	6.8%	3.3%	2.8%	0.3%	4.2%	
Others (NM/CM)	23	1.6%	1.8%	1.3%	0.8%	0.9%	0.3%	0.4%
SW Blue (PR)	23	3.3%	3.0%	1.8%	1.6%	1.2%	0.8%	
Others PR	23	1.0%	0.1%	0.3%	0.4%	0.2%	0.1%	0.7%

Market Share

Table 3: Summarises the proportion of SustainaWOOL bales received over the past four selling season, and the 2023/2024 selling season as at the 4.04.24.

	Merino			Non-Merino			All Breeds		
	SW bales	All Wool bales	SW %	SW bales	All Wool bales	SW %	SW bales	All Wool bales	SW %
19-20	78,485	961,179	8.2%	3,655	124,454	2.9%	82,140	1,085,633	7.6%
20-21	97,861	1,207,335	8.1%	4,291	138,448	3.1%	102,152	1,345,783	7.6%
21-22	101,026	1,198,921	8.4%	5,110	160,953	3.2%	106,136	1,359,874	7.8%
22-23	99,532	1,180,272	8.4%	6,141	158,219	3.9%	105,673	1,338,491	7.9%
23-24	60,947	864,204	8.1%	4,745	124,209	3.8%	74,692	988,413	7.6%

SustainaWOOL Integrity Scheme relaunch Introducing the Australian Wool Sustainability Scheme

A new name and a new era for the SustainaWOOL Integrity Scheme. We are excited to announce the official launch of the Australian Wool Sustainability Scheme will be on Tuesday 16 April at the IWTO Congress 2024. The new program, including new Standards and process will be in place from 1 July 2024.

The Australian wool industry has survived and thrived over the centuries with a long and proud history of wool growing expertise and quality clip preparation, and by seizing opportunities to further farming innovations, meet changing customer needs, whilst nurturing the safety, prosperity and inclusion of the people employed and communities served.

The IWTO Congress 2024 is an ideal opportunity to present the Australian Wool Sustainability Scheme, a fit-for-purpose scheme that celebrates all the things the Australian wool product is renowned for, where integrity and quality matters, to a global audience.

We look forward to providing more information about the new Australian Wool Sustainability Scheme which will enable Australian woolgrowers to produce, and global supply chain partners to access, Australian wool that has been verified and certified to meet global raw materials sustainability Standards.



AWEX Key Dates

- i. IWTO Congress Adelaide 16th – 18th April
- ii. AWEX Board Meeting 19th April
- iii. National Auction Selling Committee Quarterly Meeting 16th May 2024
- iv. Wool Sale mid-year three week recess commences 29th July 2024

The Market

Auction Offerings

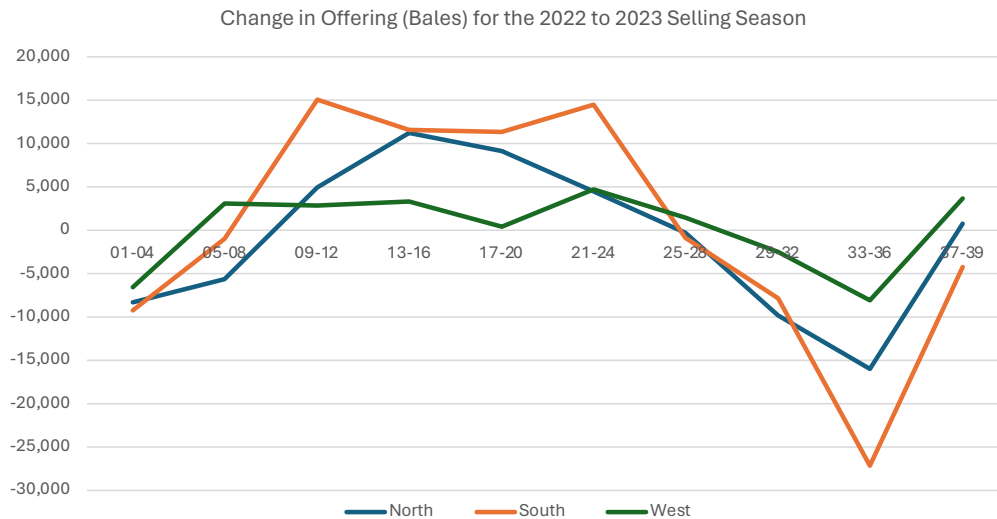


Chart 1: Change in quantity of bales offered in Australian stores for the 2022 to 2023 seasons, broken into four-week intervals by Region.

Sale Weeks 1-39

Whilst the season to date totals are similar, the offering profile for Season 23 is unfolding in quite a different manner to Season 22.

Breaking this down into 4-week intervals (Chart 1), Season 23 opened with smaller offerings before gaining momentum in October to December with all regions

recording increases for each interval, particularly in the North and South.

Offerings post-Christmas have been more subdued with Weeks 33-36 most notably falling 25% nationally over the same period last season.

Offerings in Weeks 37-39 have recovered to similar levels.

Lot Offering

Offer Season*	Total Bales Offered**	Bales Tested in Offer Season	Bales Tested in Previous SNs	Avg Time to Offer*** (days)
21/22	1,354,560	1,194,968	159,592 (11.8%)	24.5
22/23	1,358,865	1,223,105	135,760 (10.0%)	21.4
23/24	1,354,306	1,161,432	192,874 (14.2%)	20.4

Table 1: Total bale offering for Sale weeks 1-39 in the 2023 selling season.

Looking at the offering in more detail, we can see the total offering for Weeks 1-39 are similar over the last three seasons, though in Season 23/24 the offering has been supplemented with more wool tested in previous Seasons.

Data Parameters

- Weeks 1-39
- Excluding New Zealand, Includes Reoffers
- For wool tested and offered in the Offer Season. (Wool tested in the Previous Season is not included). Typically for each of these

Seasons, 75% of wool tested and offered in Offer Season is offered within 11.9 calendar days. The length of time held in store for the remaining 25% is the factor that influences the total Average Time to Offer detailed above.