

Q4 / 2024–2025

Welcome to the AWEX Update

It's an honour to step into the role of CEO at AWEX. I recognise that I'm joining at a challenging time for the wool industry, with shrinking volumes, tight profit margins, strong competition and difficult seasonal conditions across many growing regions. I look forward to leading AWEX as we work with industry to navigate this period.

At the recent IWTO Congress in Lille, I had the opportunity to speak with a wide range of stakeholders about the pressures, expectations and opportunities facing wool. Many of these are shared with other agricultural sectors, particularly the growing need for credible data, practical systems and strong relationships across the value chain.

I see an organisation in AWEX that is listening to industry and delivering innovative tools such as WoolClip, eBale and the Australian Wool Sustainability Scheme to help meet increasing market expectations for quality, traceability and sustainability.

I'd like to acknowledge Mark Grave for his leadership and thank him and the wider AWEX team for their long-standing contribution to the industry and the delivery of these innovations.

While there is more work ahead to embed these tools and services, AWEX is well positioned to deliver. Our success will depend on continued collaboration, support and partnership across the wool supply chain. I'm committed to ensuring AWEX continues to listen and engage with all of industry, and I look forward to working with you.

Charlie McElhone, CEO

Strategy 2025–2029

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

AWEX's four-year strategy is centred on three key pillars: strengthening our foundational services, supporting supply chain trust and transparency, and enabling industry efficiency. Whether through modernised integrity programs, stronger digital traceability, or enhanced stakeholder engagement, our focus is on delivering relevant, independent, and practical services that support the entire wool supply chain.

AWEX People News



Brett Matthews, Head of Business Development, joins AWEX focused on strengthening relationships with selling agents, and supporting the adoption of WoolClip, eBale and the AWSS. Brett brings strong experience in commercial strategy and stakeholder engagement across agriculture.



Connie Marais, Senior Business Analyst, supporting the AWSS and other strategic IT-enabled initiatives. Conni brings broad experience across organisations including Suncorp, NBN, ASIC, Fuji Xerox, Unilever, and Tourism Australia, with a strong track record in aligning business needs with smart digital solutions.



Kate Gowdie, Integrity & Assurance Manager, will oversee compliance of AWEX's integrity programs, including the AWSS and the NWD-IP. Kate will lead our partnership with AUS-MEAT, ensuring robust and independent assurance processes.

Why PIC-Level Certification Matters More Than Ever

Wool buyers – particularly for brands that trade in Europe – are placing more value on verified sustainability at the farm level. What's driving this? New EU regulations mean brands must be able to prove the sustainability claims they make, right back to the property.

Things like the EU Green Claims Directive and Corporate Sustainability Due Diligence Directive are pushing companies to move beyond general claims and focus on credible, property-level evidence.

The Australian Wool Sustainability Scheme (AWSS) offers a practical, cost-effective way to meet this need through PIC-level certification. Interest is already growing from the Italian textile sector, with support from Sistema Moda Italia members and brands like Loro Piana and LVMH adding SustainaWOOL certification to their procurement lists.

For selling agents working with clients who want to stay aligned with market expectations, AWSS provides a straightforward and cost-effective way to get certified at a PIC level.

To learn more, contact the AWSS team.

AWSS Partner Program

For industry stakeholders of certified Australian wool



AWSS Partner Program Now Live

Supporting Certified, Sustainable Australian Wool

The AWSS Partner Program is officially live and we're inviting wool supply chain businesses to formally align with Australia's national sustainability certification.

The program recognises businesses that play a vital role in upholding the quality, integrity, and traceability of the Australian Wool Sustainability Scheme (AWSS). With growing global demand for certified, sustainable, and traceable wool, becoming an AWSS Partner is a powerful and practical way to demonstrate leadership and future-proof your market position.

Whether you're a selling agent, exporter, processor or brand, the AWSS Partner Program offers exclusive advantages, including:

- Access to request a Wool Certificate of Compliance
- Permission to use the AWSS Partner Badge
- Digital traceability support

- Public recognition in the AWSS Partner Directory
- A clear point of difference in competitive, sustainability-driven markets

This is your opportunity to be recognised, stand out, and support the trusted delivery of certified Australian wool to the world.

[Apply now to become an AWSS Partner](#)



More information about AWSS

Register for our upcoming webinar

Date: Monday 14 July

Time: 2:00pm–3:00pm AEST

[Registration link](#)



AWSS: Certification That Fits Your Business

One Scheme. Two clear pathways

Global demand for certified, sustainable, and traceable wool is growing – and the Australian Wool Sustainability Scheme (AWSS) is designed to help Australian wool growers meet that demand, practically and credibly.

Whether you produce non-mulesed wool or use pain relief when mulesing, there is now a certification pathway to suit your operation with no compromise on quality, traceability, or credibility.

Both pathways ensure your wool can be recognised and preferred in a market that increasingly values transparency, animal wellbeing, and responsible land stewardship. If you've been waiting for a certification that works for your business, now is the time. Join the AWSS and help position Australian wool at the forefront of sustainable production.

SustainaWOOL™

For growers with non-mulesed flocks who want a practical, fit-for-purpose sustainability certification that meets customer expectations values quality clip preparation and embeds digital traceability via WoolClip & eBale.

ResponsiWOOL™

For growers who use pain relief when mulesing and want to showcase their commitment to sustainable, responsible practices. It offers the same certification framework, traceability tools, and quality assurance as SustainaWOOL.

Questions? We're here to help

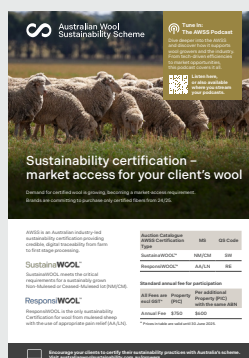
For more information about AWSS, contact the AWEX team at awss@awex.com.au or visit the AWSS website at australianwoolsustainability.com.au, where you can listen to our podcast and find other resources on AWSS Certification.



Learn More – AWSS Podcast

[Listen here](#)

or also available where
you stream your podcasts



About AWSS Brochure

[Download](#)



Insights from the IWTO Congress

Global Expectations Reinforce AWEX's Investment in Sustainability and Traceability

This year's IWTO Congress in Lille reinforced a message we're hearing more consistently across markets: sustainability certification and traceability are no longer optional – they are expected.

Global customers and brands are placing increasing importance on having credible, transparent systems that verify wool's origin, production practices, and environmental footprint. The demand for certified, sustainable wool with clear provenance is shaping procurement decisions and driving industry-wide change.

AWEX is proud to be ahead of the curve. Through long-term investment in WoolClip, eBale, and the Australian Wool Sustainability Scheme (AWSS), we've built the infrastructure needed to support this shift, making traceability and certification practical, accessible, and trusted for Australian wool growers and supply chain partners.

These programs are not just technical tools, they're strategic enablers, helping Australian wool meet the evolving expectations of international markets and maintain its leadership in a competitive, values-driven landscape.

AWEX Key Dates



Wool Classer RTO

Trainers Workshop Melbourne..... July 3–4

AWEX ID Course (South)..... July 21–22

AWEX CEO Introduction (West)..... July 22

Wool Week..... September 11

AWEX Board Meeting..... September 17

Nanjing Wool Market Conference... September 19–21



WoolClip + eBale: Traceability Made Easy

Traceability and biosecurity are critical to the future of Australian wool, and with WoolClip and eBale, the tools to enable this are already in place.

By capturing digital clip data on-farm and scanning your wool pack to link eBale IDs, WoolClip makes it easy for growers and Wool Classers to support market transparency and biosecurity.

WoolClip adoption continues to grow:

- 284,980 bales went through WoolClip in Season 2024, a 9% increase on the previous season
- Usage has nearly doubled since 2022 and more than tripled since 2021
- WoolClip now captures ~20% of the first-hand offered clip

For those already using WoolClip and eBale – thank you. If you're not yet on board, now is the time to connect with the industry's traceability tools and help deliver a more traceable, sustainable and efficient wool industry.



WoolClip Training and Events

AWEX remains dedicated to offering industry participants the opportunity to attend workshops across regional Australia. These workshops provide valuable insights into how transitioning to WoolClip can streamline wool clip documentation and improve efficiency.

July

RTO Trainers Workshop,
Melbourne VIC 3–4th
Australian Sheep and Wool Show,
Bendigo VIC 18–20th

August

Nyngan Ag Expo, NSW 2nd
The Marra, NSW 3rd
Brewarrina, NSW 4th
Glen Innes, NSW 5th
Uralla, NSW 6th
Wellington, NSW 7th
Cootamundra, NSW 14th
Riverina Merino Expo, Conargo, NSW 27th

September

South West Slopes Stud, Merino Breeders
Field Day, NSW 2nd

WoolClip Support and Resources

To access the current “How To” resources for Wool Classers and for Growers, as well as broker posters and media and how to guides, please go to: 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** WoolClip Program Lead to arrange a suitable time/date.

WoolClip support is available 7 days a week.

Are you interested in becoming a certified WoolClip specialist for your business?

Please contact woolclip@awex.com.au for more information on training options available.

Wool Classing



AWEX Master Classer Course

AWEX has recently concluded its Master Classer course in Melbourne, held in May 2025. This advanced professional development program is aimed at enhancing the participants understanding of the wool industry and the requirements of the customers of classed wool and the Wool Classer.



Course Overview

The Master Classer course is a four-day intensive program that delves into various aspects of wool classing. Participants engage in workshops covering topics such as:

- Quality assurance principles
- Clip analysis and show floor preparation
- Customer requirements from producers to processors
- Strategic thinking and decision support tools
- WoolClip and eBale
- The 2025–2027 Wool Classing Code of Practice



A key component of successful course completion is an open-book examination on the Wool Classing Code of Practice.

Each course is limited to a maximum of 15 participants, selected from industry nominees and Wool Classers identified by AWEX through its performance monitoring. 9 new Master Classers completed the training which included traceability, eBale and WoolClip sessions. A highlight of the course is a leadership and influencing workshop which identifies personal skills in working with people and problem solving.

For more information or to express interest in future Master Classer courses, please contact **Fiona Raleigh**, Wool Classer Registrar, at woolclasser@awex.com.au

This initiative underscores AWEX's commitment to maintaining high standards in wool classing and supporting the professional development of individuals in the industry.



Follow us on Facebook
www.facebook.com/woolexchange/
for Classing tips & technical information.

Statistics

At the end of Quarter 4, the national declaration rate has risen to 76.8%, with strong participation continuing in Tasmania (85.9%) and Queensland (87.8%). Declaration trends remain consistent with previous reporting, while analysis of premiums and discounts continues to show a penalty for Non-Declared (ND) wool.

Declaration rates (%) by Mulesing Status and State for Seasons 2022/23 to 2024/25 (as at 30.06.25)

SEASON	2023	2024
National Decl. Rate	75.6	76.8
BY MULESING STATUS (%)		
NM	21.5	22.7
CM	3.0	2.6
LN	0.1	0.2
AA	43.0	44.5
M	7.9	6.8
ND	24.5	23.2
BY MULESING STATUS (%)		
NSW	79.2	81.7
QLD	83.9	87.8
SA	80.6	81.1
TAS	85.2	85.9
VIC	78.2	79.0
WA	58.5	55.1

NWD Declaration rates (%) and Mulesing Status by State for Season 2024/25 (as at 30.06.25)

Mulesing Status	NSW	QLD	SA	TAS	VIC	WA	Total Bales
NM	27.5	43.8	13.5	52.9	25.8	7.1	287,476
CM	2.5	4.1	3.1	5.7	3.0	0.7	32,368
LN	0.1	0.0	0.1	0.0	1.1	0.0	3,157
AA	44.9	33.5	55.9	24.1	44.8	38.7	562,839
M	6.8	6.5	8.5	3.2	4.3	8.6	85,377
ND	18.3	12.2	18.9	14.1	21.0	44.9	292,832
Total Bales	512,684	40,088	202,836	41,561	250,062	216,830	1,264,061
% Declared	81.7	87.8	81.1	85.9	79.0	55.1	76.8

Premiums and discounts (c/kg clean) for mulesing status as at EOM June 2025

		MERINO						NON-MERINO				
		16	17	18	19	20	21	22	27	28	29	30
NON MULESED (NM)												
Season	2022	25	36	15	17	19	6		0	-2	1	0
	2023	19	17	17	7	2			0	5	4	
	2024	25	20	9	8	5				5		
CEASED MULESING (CM)												
Season	2022		30	14	14	10	6					
	2023			9	5	2	1					
	2024		20	8	6	2				2		
MULESED with ANALGESIC and/or ANAESTHETIC (AA)												
Season	2022		19	5	9	6	4		0	0		
	2023			8	5	2	1		0	4	4	
	2024	8	7	7	6	2				2	2	
NOT DECLARED (ND)												
Season	2022	-39	-28	-24	-2	0	0		-4	-15	-13	
	2023	-15	15	-7	-5	-5	-1		-7	0	-1	
	2024		-27	-20	-1					-6	-4	

Not Declaring (ND) continues to attract discounts

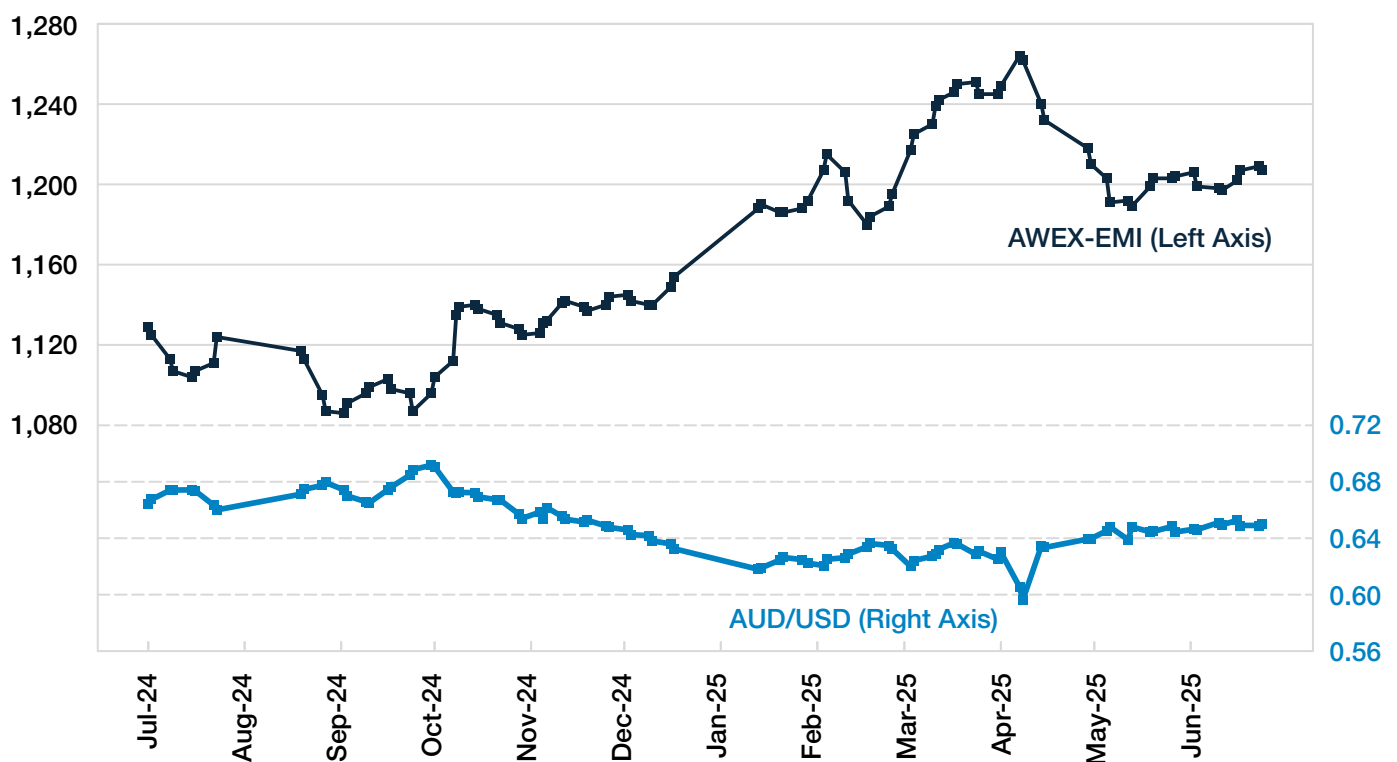
During the 2024/25 selling season we continue to see discounts for Non-Declared (ND) wool compared to wool declared as Mulesed (M).

The Market

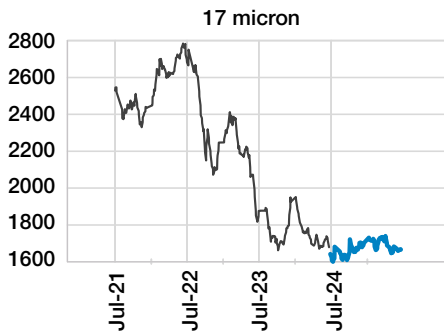
Total Market Value Sold (AUD), excludes NZ.

	2021/22	2022/23	2023/24	2024/25
Sold (Mkg)	287.7	287.3	296.8	254.3
Sold (Bales)	1,608,032	1,607,799	1,659,483	1,419,576
Sold (\$Bn)	\$2.59	\$2.42	\$2.24	\$1.94

AWEX-Eastern Market Indicator

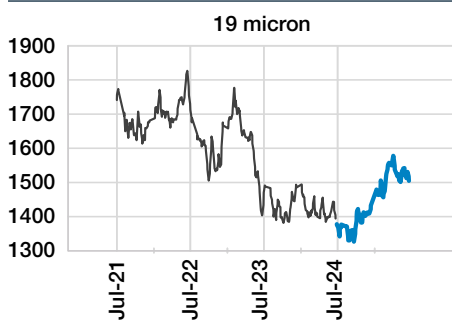


Micron Price Guides (Eastern) – 2024/25 season performance



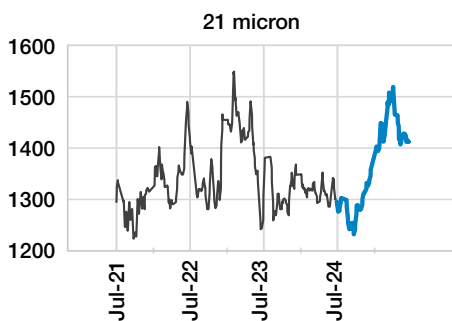
2023/24 close: 1679
 2024/25 close: 1666
 -13 (-0.8%)

	2021/22	2022/23	2023/24	2024/25
Season Maximum	2829	2751	1970	1743
Season Average	2548	2279	1763	1675
Season Minimum	2329	1793	1650	1600



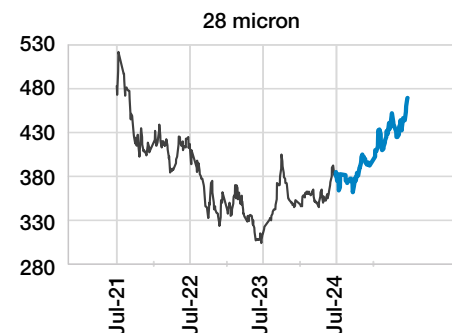
2023/24 close: 1395
 2024/25 close: 1505
 +110 (+7.9%)

	2021/22	2022/23	2023/24	2024/25
Season Maximum	1829	1780	1498	1585
Season Average	1698	1616	1426	1450
Season Minimum	1613	1399	1376	1326



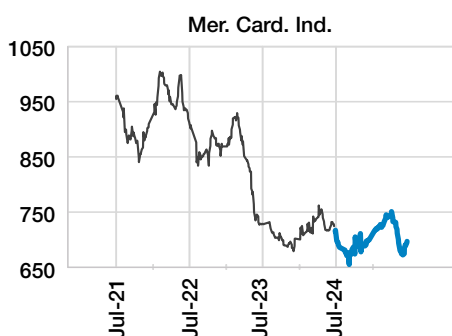
2023/24 close: 1301
 2024/25 close: 1412
 +111 (+8.5%)

	2021/22	2022/23	2023/24	2024/25
Season Maximum	1494	1567	1383	1522
Season Average	1319	1384	1316	1363
Season Minimum	1215	1242	1259	1232



2023/24 close: 384
 2024/25 close: 470
 +86 (+22.4%)

	2021/22	2022/23	2023/24	2024/25
Season Maximum	530	417	408	475
Season Average	427	347	358	408
Season Minimum	382	290	310	360



2023/24 close: 725
 2024/25 close: 697
 -28 (-3.9%)

	2021/22	2022/23	2023/24	2024/25
Season Maximum	1011	931	778	751
Season Average	931	856	715	703
Season Minimum	829	708	676	645

Micron Price Guide's – seasonal high/low/averages

National		High
EMI	8-Apr-25	1264
North		High
Ind.	8-Apr-25	1299
165	15-Jan-25	1828
17	25-Mar-25	1738
175	12-Mar-25	1708
18	12-Mar-25	1650
185	9-Apr-25	1621
19	8-Apr-25	1585
195	8-Apr-25	1570
20	8-Apr-25	1531
21	8-Apr-25	1522
22	3-Dec-24	1305
25	6-May-25	711
26	24-Jun-25	652
28	24-Jun-25	475
30	5-Feb-25	390
32	18-Feb-25	330
MC	8-Apr-25	741
South		High
Ind.	8-Apr-25	1240
165	14-Jan-25	1828
17	8-Apr-25	1743
175	25-Mar-25	1702
18	25-Mar-25	1657
185	8-Apr-25	1625
19	8-Apr-25	1571
195	8-Apr-25	1542
20	8-Apr-25	1521
21	8-Apr-25	1516
22	8-Apr-25	1501
23	8-Apr-25	1479
24	4-Mar-25	1147
25	25-Jun-25	801
26	25-Jun-25	675
28	25-Jun-25	464
30	17-Jun-25	405
32	24-Jun-25	347
MC	8-Apr-25	751
West		High
Ind.	8-Apr-25	1426
175	17-Dec-24	1582
18	8-Apr-25	1633
185	9-Apr-25	1602
19	8-Apr-25	1578
195	9-Apr-25	1552
20	8-Apr-25	1537
21	9-Apr-25	1504
MC	26-Mar-25	770

		Low
EMI	3-Sep-24	1086
		Low
Ind.	3-Sep-24	1117
165	3-Sep-24	1700
17	10-Jul-24	1605
175	9-Jul-24	1508
18	3-Sep-24	1432
185	28-Aug-24	1358
19	28-Aug-24	1327
195	25-Sep-24	1289
20	25-Sep-24	1262
21	2-Oct-24	1242
22	3-Dec-24	1305
25	3-Dec-24	685
26	11-Sep-24	552
28	17-Jul-24	360
30	17-Jul-24	320
32	30-Oct-24	295
MC	21-Aug-24	689
		Low
Ind.	25-Sep-24	1061
165	3-Sep-24	1691
17	16-Jul-24	1600
175	25-Sep-24	1530
18	25-Sep-24	1433
185	25-Sep-24	1370
19	25-Sep-24	1326
195	25-Sep-24	1282
20	25-Sep-24	1266
21	25-Sep-24	1232
22	25-Sep-24	1213
23	16-Oct-24	1184
24	20-Aug-24	1053
25	28-Aug-24	665
26	11-Dec-24	539
28	25-Sep-24	362
30	3-Sep-24	327
32	3-Sep-24	267
MC	4-Jun-25	645
		Low
Ind.	3-Sep-24	1222
175	30-Oct-24	1543
18	27-Aug-24	1402
185	27-Aug-24	1359
19	27-Aug-24	1321
195	27-Aug-24	1305
20	1-Oct-24	1273
21	1-Oct-24	1247
MC	3-Sep-24	665

		Average
EMI		1167
		Average
Ind.		1204
165		1773
17		1680
175		1614
18		1547
185		1491
19		1452
195		1422
20		1389
21		1348
22		1305
25		694
26		591
28		408
30		359
32		313
MC		713
		Average
Ind.		1143
165		1753
17		1670
175		1608
18		1545
185		1490
19		1449
195		1418
20		1393
21		1366
22		1343
23		1335
24		1100
25		716
26		591
28		409
30		360
32		315
MC		693
		Average
Ind.		1320
175		1560
18		1522
185		1482
19		1450
195		1423
20		1401
21		1374
MC		723