

NATIONAL WOOL MARKET REPORT

Season: 2025/26
Catalogue: 02
Date: 26/08/2025
Port Elizabeth

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The 2nd sale of the 2025/2026 wool season took place today, with a very limited offering of 3 527 bales. The third sale of the season is scheduled for Wednesday 27 August 2025.

The bulk of the offering (66%) tested 20 micron and finer with sustainable certified wool comprising 63% of the merino offering.

Despite a stronger ZAR currency against the US\$, the market took it's que from the positive sentiment emanating from the Australian market, with the market ending in positive territory and an overall sales clearance of 97%.

The All-Merino indicator closed up by 1,6% on R177,79 p/kg and the Certified indicator increased by 1% to close on R181,83 p/kg.

A highest price of R222,36 p/kg (clean) was paid for a single bale lot of 17,8-micron merino wool.

The Australian market increased by 0,56% (AUS\$) from the previous sale held on Wednesday, 18 August.

The major buyers on today's sale were BKB Pinnacle Fibres (991), Tianyu SA (624), Standard Wool SA (614) and Modiano (543).

The next sale will be on 27 August, with approximately 6 634 bales offered.

Key Indicators							
SA Merino Indicator				Exchange Rates *			
Indicator Unit	This Sale	Prior Sale	% Change	Currency	This Sale	Prior Sale	% Change
SA c/kg Clean All Merino	17779	17504	▲ 1,6 %	ZAR/US\$ *	17,62	17,67	▲ 0,28 %
US c/kg Clean All Merino	1009	991	▲ 1,82 %	ZAR/Euro *	20,47	20,54	▲ 0,34 %
Euro c/kg Clean All Merino	869	852	▲ 2,00 %	ZAR/JPY¥ *	8,39	8,38	▼ 0,12 %
SA c/kg Clean Certified **	18183	18000	▲ 1,0 %	ZAR/UK Pound *	23,70	23,79	▲ 0,38 %
US c/kg Clean Certified **	1032	1019	▲ 1,28 %	USD/AUD *	0,6461	0,6442	▼ 0,29 %
Euro c/kg Clean Certified **	888	876	▲ 1,37 %	AWEX EMI c/kg Clean	1254	1247	▲ 0,56 %
Percentage Difference (Weighted): Non-Certified and Certified Merino Fleece Wools Sold ***							▲ 8,97 %
* Exchange rate values quoted above is based on an average of rate points recorded for the duration of the sale. ** Certified Sustainable Wool: Includes Responsible Wool Standard & Sustainable Cape Wool Standard. *** Selection: Merino Fleece MF4 & MF5 VM < 1,6 NKT > 28 >67mm Minimum of 3 Lots Sold							

Merino Fleece MF4 & MF5 VM < 1,6 NKT > 28 >67mm Minimum of 3 Lots Sold											
Percentage Difference Between All Non-Certified and Certified Merino Fleece Wools Sold (Average Price) - 202502											
Micron Category	17.0	17.5	18.0	18.5	19.0	19.5	20.0	20.5	21.0	21.5	22.0
Non-Certified Wool (R) Clean	200,31	184,08	182,82	180,74	179,72	174,15	168,92	167,81	167,93	167,07	-
Certified Wool (R) Clean	215,83	211,20	207,24	202,45	191,15	187,26	183,97	182,55	182,36	180,36	177,79
% Difference	▲ 7,75 %	▲ 14,73 %	▲ 13,36 %	▲ 12,01 %	▲ 6,36 %	▲ 7,53 %	▲ 8,91 %	▲ 8,78 %	▲ 8,59 %	▲ 7,95 %	-
* Certified Sustainable Wool: Includes Responsible Wool Standard & Sustainable Cape Wool Standard.											

* Certified Sustainable Wool (Bales)			
		% Share **	
	Total	All Wool	Merino Wool
Offered	2 071	56,8 %	63,1 %
Sold	2 059	58,2 %	62,7 %
* Certified Sustainable Wool: Includes Responsible Wool Standard & Sustainable Cape Wool Standard. ** Calculated on unique sustainable standard identifiers			

Sale Statistics (Greasy)				
	This Sale			Accumulative
	This Week	Previous Week	This Season	Previous Season (202402)
Turnover (R)	55 099 938	136 144 702	191 424 033	210 744 328
# Bales	3 421	8 568	12 008	13 775
Mass (kg)	523 225	1 311 248	1 837 899	2 163 269

Wool Receivals Declared (Greasy)				
Current Season	Mass (kg)	Previous Season	Mass (kg)	% Change (Y-o-Y)
2025/26	4 444 631	2024/25	5 792 102	▼23,3 %

Offering Analysis (Bales)								
Description	Catalogue Offering	Withdrawn before Sale	Wool Offered	Withdrawn during Sale	Passed	Not Sold	Sold	% Sold
BKB	1971	16	1 955	10	33	66	1 879	96,11 %
CMW	1287	-	1 287	1	7	29	1 257	97,67 %
JLW	-	-	-	-	-	-	-	-
MAS	285	-	285	-	-	-	285	100 %
QWB	-	-	-	-	-	-	-	-
This Week	3543	16	3 527	11	40	95	3 421	96,99 %
Previous Week	9389	420	8 969	281	16	101	8 587	95,74 %

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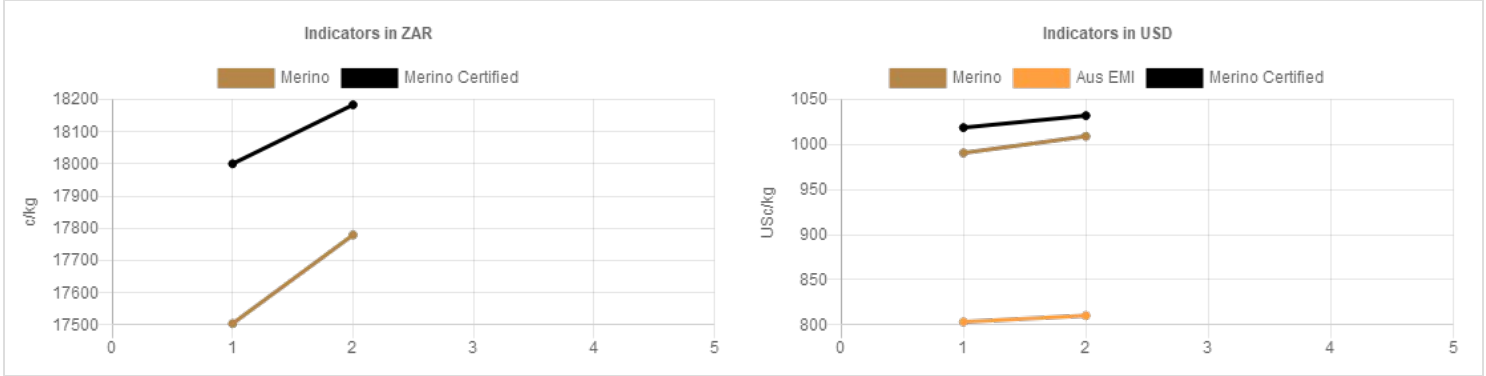
Buyer Purchases (Bales - Greasy)			
	Bales		
Company	This Sale	% Share	Bales (YTD)
BKB Pinnacle Fibres	991	28,97 %	2 863
Tianyu SA	624	18,24 %	2 522
Standard Wool SA	614	17,95 %	1 662
G Modiano SA	543	15,87 %	2 025
Stucken & Co	484	14,15 %	1 757
Segard Masurel SA	86	2,51 %	391
VBC Wool SA	48	1,4 %	421
Lempriere SA	31	0,91 %	367

Sale Analysis (Length, Micron & Class - Bales)									
	This Sale			Previous Sale			Accumulative		
	Offered	Sold	% Sold	Offered	Sold	% Sold	Offered	Sold	% Sold
All Wool									
<i>Length</i>									
Long	1 859	1 858	99,95 %	4 784	4 607	96,3 %	6 572	6 470	98,45 %
Medium	1 208	1 156	95,7 %	3 341	3 034	90,81 %	4 437	4 193	94,5 %
Short	387	380	98,19 %	1 068	924	86,52 %	1 411	1 315	93,2 %
Mixed	73	27	36,99 %	3	3	100 %	76	30	39,47 %
<i>Micron</i>									
Fine Wool: =< 20 Micron	2 339	2 302	98,42 %	6 130	5 659	92,32 %	8 303	7 980	96,11 %
Medium: 20.1 to 22	969	952	98,25 %	2 365	2 283	96,53 %	3 291	3 235	98,3 %
Strong: 22.1 to 24	138	113	81,88 %	497	440	88,53 %	620	553	89,19 %
Over Strong: > 24.1	81	54	66,67 %	204	186	91,18 %	282	240	85,11 %
<i>Class</i>									
Fleeces	2 521	2 488	98,69 %	6 451	6 163	95,54 %	8 874	8 656	97,54 %
Bellies	279	260	93,19 %	841	687	81,69 %	1 057	956	90,44 %
Pieces	387	382	98,71 %	1 122	1 063	94,74 %	1 495	1 450	96,99 %
Locks	267	264	98,88 %	778	651	83,68 %	993	915	92,15 %
Other	73	27	36,99 %	4	4	100 %	77	31	40,26 %

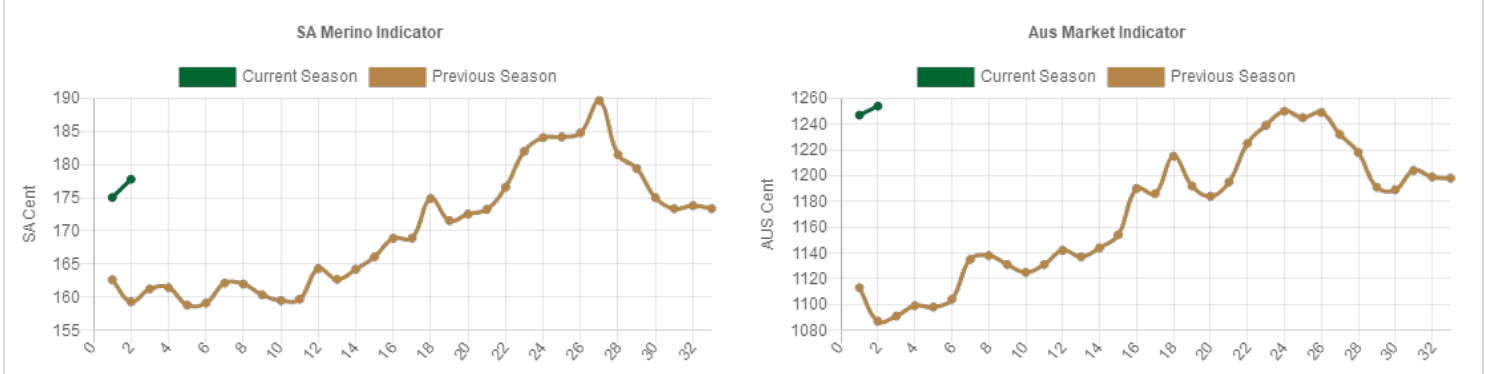
Analysis of Bales Sold (Micron, Length & Style)										
	<=18.0	18.5	19.0	19.5	20.0	20.5	21.0	21.5	22.0	>=22.5
Length										
Long	114	201	198	223	292	279	159	98	65	14
Medium	100	194	195	139	138	61	26	15	19	13
Short	86	62	67	20	28	20	10	25	3	-
Mixed	-	-	-	-	-	-	6	-	2	-
Style (AWEX)										
Style 4 & Better	57	69	83	136	165	157	117	40	31	-
Style 5	182	304	277	196	229	151	43	63	26	4
Style 6	59	83	100	45	55	35	33	31	27	21
Style 7 & Poorer	2	1	-	5	9	17	2	4	3	2

Average price of Wool Sold (Micron, Style & Length - Clean)												
		17.0	17.5	18.0	18.5	19.0	19.5	20.0	20.5	21.0	21.5	22.0
Merino Fleece, AWEX Style 4 - MF4												
40 mm	Non-Certified	-	-	-	-	-	-	-	-	-	-	-
	Certified	-	-	-	-	-	-	-	-	-	-	-
50 mm	Non-Certified	-	165,13	-	170,66	153,64	-	-	-	-	-	-
	Certified	-	-	-	-	-	-	-	-	-	156,12	-
60 mm	Non-Certified	-	176,53	-	-	-	-	-	-	-	-	-
	Certified	-	194,63	193,28	187,46	181,86	-	177,98	175,44	-	-	-
70 mm	Non-Certified	200,30	-	-	-	178,48	-	169,84	168,73	-	167,86	-
	Certified	214,86	217,92	210,56	206,09	193,91	187,13	184,02	181,21	182,09	179,77	177,76
80 mm	Non-Certified	-	-	191,39	-	-	-	-	-	-	-	-
	Certified	-	207,00	213,55	201,42	193,83	188,88	187,53	183,52	183,03	-	177,87
Merino Fleece, AWEX Style 5 - MF5												
40 mm	Non-Certified	156,68	135,58	126,06	157,25	146,73	126,30	-	-	-	-	-
	Certified	-	137,37	160,01	157,74	-	159,87	148,23	-	-	-	-
50 mm	Non-Certified	-	163,78	-	-	153,16	-	-	-	-	-	-
	Certified	188,80	183,06	185,14	176,50	-	163,44	163,45	-	-	-	-
60 mm	Non-Certified	186,12	175,10	-	169,65	173,78	163,90	-	-	-	-	-
	Certified	195,94	-	134,88	178,28	177,07	175,45	176,70	172,12	174,92	170,15	-
70 mm	Non-Certified	-	181,89	184,08	180,79	171,44	164,30	169,08	165,00	168,37	166,74	-
	Certified	-	194,71	191,43	196,96	190,59	183,21	180,84	180,79	181,54	176,54	176,56
80 mm	Non-Certified	-	194,34	180,81	-	-	-	168,34	-	166,57	-	-
	Certified	-	203,84	191,61	203,86	189,41	185,36	-	181,38	-	-	-
Merino Fleece, AWEX Style 6 - MF6												
40 mm	Non-Certified	-	-	-	-	-	138,41	118,49	103,84	80,50	-	-
	Certified	-	-	-	-	152,20	-	-	-	-	-	-
50 mm	Non-Certified	-	-	-	-	-	-	113,40	-	-	-	-
	Certified	-	-	-	-	-	-	-	-	-	-	-
60 mm	Non-Certified	-	-	-	-	151,43	-	71,45	126,52	-	-	-
	Certified	-	-	-	-	-	-	-	-	-	-	-
70 mm	Non-Certified	-	-	-	146,28	-	-	-	166,06	165,80	-	-
	Certified	-	-	-	-	-	-	-	-	-	-	-
80 mm	Non-Certified	-	-	-	-	-	-	-	152,95	-	-	-
	Certified	-	-	-	-	-	-	-	-	-	-	-
* Certified Sustainable Wool: Includes Responsible Wool Standard & Sustainable Cape Wool Standard.												

Market Indicators



Market Indicators - South Africa and Australia



Micron Category Comparisons - South Africa VS Australia

