

NATIONAL WOOL MARKET REPORT

Season: 2025/26
Catalogue: 03
Date: 27/08/2025
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After the 2nd sale of the season took place yesterday, 26 August, the third sale of the season was held today with an offering of 6 577 bales.

The offering mainly consisted of fine micron wools, with 66% testing 20 micron and finer and 69,8% of the merino wools on offer being certified as sustainable.

The wool market continued on it's upward trend from the opening sale of the season and once again delivered good results across all micron categories. Stronger competition for the good quality individual clips on offer resulted in an overall sales clearance of 95%.

The all-merino indicator closed up by 1% on R179,53 p/kg and the certified indicator increased by 1,4% to close on R184,35 p/kg.

A highest price of R246,36 p/kg(clean) was paid for a 2-bale lot of 16,4-micron merino wool.

The Australian market once again delivered good results today and increased by 0,56%(AU\$) from the previous auction held yesterday, 26 August. .

The major buyers on today's sale were BKB Pinnacle Fibres (1 556), G Modiano SA (1 410), Stucken & Co (893) and Standard Wool (852).

The next sale will be held on 10 September 2025 when approximately 5 165 bales will be on offer.

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	17953	17779	▲ 1,0 %	ZAR/US\$ *	17,71	17,62	▼ 0,51 %
US c/kg Clean All Merino	1014	1009	▲ 0,50 %	ZAR/Euro *	20,50	20,47	▼ 0,15 %
Euro c/kg Clean All Merino	876	869	▲ 0,81 %	ZAR/JPY¥ *	8,37	8,39	▲ 0,24 %
SA c/kg Clean Certified **	18435	18183	▲ 1,4 %	ZAR/UK Pound *	23,77	23,70	▼ 0,30 %
US c/kg Clean Certified **	1041	1032	▲ 0,87 %	USD/AUD *	0,6454	0,6461	▲ 0,11 %
Euro c/kg Clean Certified **	899	888	▲ 1,24 %	AWEX EMI c/kg Clean	1261	1254	▲ 0,56 %
Percentage Difference (Weighted): Non-Certified and Certified Merino Fleece Wools Sold ***							▲ 8,21 %
* 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) - 202503											
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	199,53	192,73	186,63	186,50	181,80	175,05	173,15	170,96	166,98	161,32	-
Certified Wool (R) Clean	212,10	210,94	204,93	202,51	194,21	188,55	185,50	184,46	184,01	183,01	182,31
% Difference	▲ 6,30 %	▲ 9,45 %	▲ 9,81 %	▲ 8,58 %	▲ 6,83 %	▲ 7,71 %	▲ 7,13 %	▲ 7,90 %	▲ 10,20 %	▲ 13,45 %	-
* Certified Sustainable Wool: Includes Responsible Wool Standard & Sustainable Cape Wool Standard.											

* Certified Sustainable Wool (Bales)			
		% Share **	
	Total	All Wool	Merino Wool
Offered	4 836	65,6 %	69,8 %
Sold	4 795	68,4 %	69,2 %
* 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 (202403)
Turnover (R)	106 307 547	55 099 938	297 837 956	294 810 964
# Bales	6 252	3 421	18 266	19 304
Mass (kg)	974 797	523 225	2 813 543	3 012 676

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	3356	17	3 339	21	38	82	3 236	96,92 %
CMW	1430	39	1 391	-	1	1	1 390	99,93 %
JLW	525	-	525	-	-	-	525	100 %
MAS	493	5	488	-	-	-	488	100 %
QWB	834	-	834	202	1	19	613	73,5 %
This Week	6638	61	6 577	223	40	102	6 252	95,06 %
Previous Week	3543	16	3 527	11	40	89	3 427	97,16 %

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Buyer Purchases (Bales - Greasy)			
	Bales		
Company	This Sale	% Share	Bales (YTD)
BKB Pinnacle Fibres	1 556	24,89 %	4 419
G Modiano SA	1 410	22,55 %	3 441
Stucken & Co	893	14,28 %	2 650
Standard Wool SA	852	13,63 %	2 514
Tianyu SA	722	11,55 %	3 244
Lempriere SA	352	5,63 %	719
Segard Masurel SA	298	4,77 %	689
VBC Wool SA	169	2,7 %	590

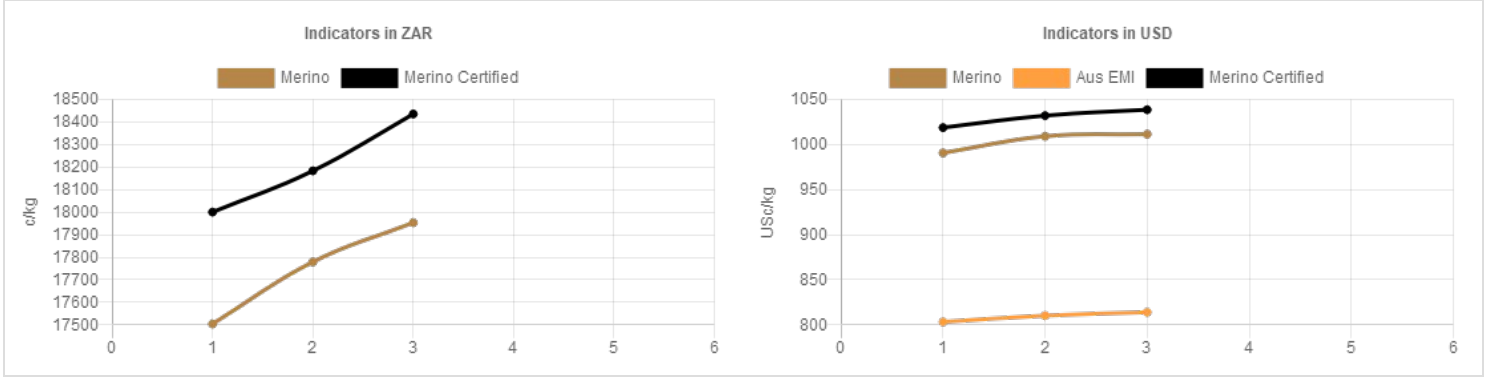
Sale Analysis (Length, Micron & Class - Bales)									
	This Sale			Previous Sale			Accumulative		
	Offered	Sold	% Sold	Offered	Sold	% Sold	Offered	Sold	% Sold
All Wool									
<i>Length</i>									
Long	3 876	3 792	97,83 %	1 859	1 858	99,95 %	10 448	10 262	98,22 %
Medium	2 022	1 880	92,98 %	1 208	1 156	95,7 %	6 459	6 077	94,09 %
Short	676	577	85,36 %	387	380	98,19 %	2 087	1 894	90,75 %
Mixed	3	3	100 %	73	27	36,99 %	79	33	41,77 %
<i>Micron</i>									
Fine Wool: =< 20 Micron	4 499	4 237	94,18 %	2 339	2 302	98,42 %	12 802	12 223	95,48 %
Medium: 20.1 to 22	1 867	1 814	97,16 %	969	952	98,25 %	5 158	5 049	97,89 %
Strong: 22.1 to 24	141	131	92,91 %	138	113	81,88 %	761	684	89,88 %
Over Strong: > 24.1	70	70	100 %	81	54	66,67 %	352	310	88,07 %
<i>Class</i>									
Fleeces	4 582	4 468	97,51 %	2 521	2 488	98,69 %	13 456	13 130	97,58 %
Bellies	614	532	86,64 %	279	260	93,19 %	1 671	1 488	89,05 %
Pieces	811	762	93,96 %	387	382	98,71 %	2 306	2 212	95,92 %
Locks	567	487	85,89 %	267	264	98,88 %	1 560	1 402	89,87 %
Other	3	3	100 %	73	27	36,99 %	80	34	42,5 %

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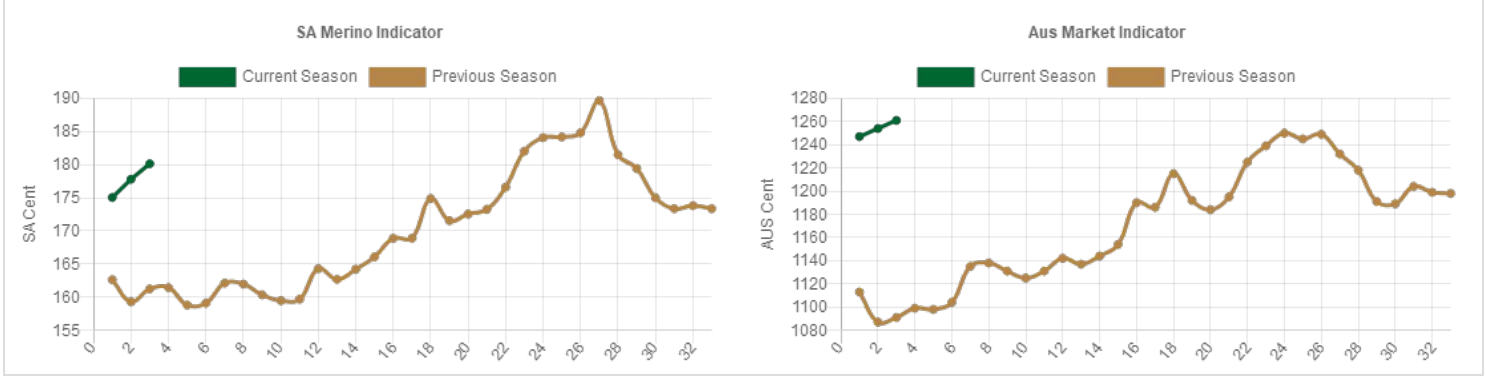
Analysis of Bales Sold (Micron, Length & Style)										
	<=18.0	18.5	19.0	19.5	20.0	20.5	21.0	21.5	22.0	>=22.5
Length										
Long	211	302	471	659	681	507	345	155	110	45
Medium	178	284	297	292	230	158	71	38	17	8
Short	63	176	114	76	48	11	3	5	3	-
Mixed	-	-	-	-	-	-	-	-	-	-
Style (AWEX)										
Style 4 & Better	164	218	256	339	421	336	236	89	102	27
Style 5	206	378	425	504	390	245	140	68	10	20
Style 6	81	161	195	174	121	74	31	20	16	6
Style 7 & Poorer	1	5	6	10	27	21	12	21	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	-	154,90	165,37	160,05	-	157,05	-	-	-	-	-
50 mm	Non-Certified	-	-	-	-	-	-	-	-	-	-	-
	Certified	184,72	-	192,13	175,61	180,97	170,93	169,24	173,22	161,80	-	157,43
60 mm	Non-Certified	-	-	176,01	169,71	-	-	-	-	163,31	-	-
	Certified	197,52	-	195,15	190,34	185,60	186,29	180,24	177,60	179,19	174,32	168,94
70 mm	Non-Certified	199,19	196,71	189,93	176,87	183,00	174,56	171,24	171,36	171,39	-	-
	Certified	216,82	208,46	204,58	206,39	193,32	187,43	183,55	183,92	182,30	183,49	182,32
80 mm	Non-Certified	-	-	186,75	192,64	-	173,92	173,48	-	169,54	-	169,25
	Certified	-	203,51	205,84	192,57	198,31	188,71	184,83	184,60	184,22	-	179,71
Merino Fleece, AWEX Style 5 - MF5												
40 mm	Non-Certified	-	-	-	152,70	144,54	-	-	-	-	-	-
	Certified	-	161,99	169,19	149,03	154,70	-	143,16	-	151,76	-	-
50 mm	Non-Certified	-	-	164,24	-	-	149,03	165,07	-	-	-	-
	Certified	-	-	176,73	175,31	-	-	159,90	-	-	-	-
60 mm	Non-Certified	181,24	-	170,59	171,07	169,65	164,11	164,59	137,48	136,38	-	-
	Certified	203,77	-	183,32	184,66	179,22	178,39	169,15	-	-	173,90	-
70 mm	Non-Certified	202,08	-	175,18	176,26	177,08	168,70	164,10	167,52	155,08	-	-
	Certified	205,22	193,96	199,17	183,67	186,13	179,49	181,97	180,38	173,72	182,19	-
80 mm	Non-Certified	-	193,50	186,28	180,97	175,42	173,45	171,13	168,70	171,21	-	169,42
	Certified	209,66	202,81	-	185,30	177,38	186,34	182,75	182,17	181,40	180,29	167,19
Merino Fleece, AWEX Style 6 - MF6												
40 mm	Non-Certified	-	-	-	134,47	129,11	148,48	-	-	-	-	-
	Certified	-	-	-	-	-	-	-	-	-	-	-
50 mm	Non-Certified	-	-	-	-	-	-	133,22	151,95	-	-	-
	Certified	-	-	171,50	-	-	-	-	-	-	-	-
60 mm	Non-Certified	-	-	-	153,71	-	146,46	132,43	135,08	-	-	-
	Certified	-	-	-	-	-	-	-	-	-	-	-
70 mm	Non-Certified	-	-	-	-	169,25	167,15	149,06	136,12	-	158,03	-
	Certified	-	-	-	-	-	-	169,13	-	-	-	-
80 mm	Non-Certified	-	-	-	-	-	-	-	165,55	-	165,64	-
	Certified	-	-	-	-	-	179,05	-	-	-	-	-
* 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

