

NATIONAL WOOL MARKET REPORT

Season: 2025/26
Catalogue: 01
Date: 20/08/2025
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The 2025/26 wool season kicked off this week, with 9 196 bales on offer on the 1st sale of the season.

The offering consisted of good quality wool, with 67% of the offering testing 20 micron and finer and 63,3% of the merino wools on offer being certified as sustainable.

Despite a slightly stronger ZAR against the US\$, the season kicked off on a positive note, with sustainably certified wool attracting good competition. A good overall sales clearance of 93,1% was achieved.

The all-merino indicator increased by 0,7% to close on R175,04 p/kg, with the certified indicator gaining 1,3% to close on R180,00 p/kg.

A highest price of R227,98 p/kg (clean) was paid for a 2-bale lot of 16,5-micron merino wool.

The Australian market continued its positive trend from the last few sales of the 2024/25 season and increased by 0,7% (AU\$) from the previous sale held on Wednesday, 23 July.

The major buyers on the sale were Tianyu SA (1 896), BKB Pinnacle Fibres (1 872), BKB Pinnacle Fibres (1 872) and G Modiano SA (1 479).

Catalogues 2 and 3 will be offered on 26 and 27 August, with 3 094 and 9 642 bales offered respectively.

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	17504	17380	▲ 0,7 %	ZAR/US\$ *	17,67	17,71	▲ 0,23 %
US c/kg Clean All Merino	991	981	▲ 1,02 %	ZAR/Euro *	20,54	20,23	▼ 1,55 %
Euro c/kg Clean All Merino	852	859	▼ 0,81 %	ZAR/JPY¥ *	8,38	8,19	▼ 2,32 %
SA c/kg Clean Certified **	18000	17777	▲ 1,3 %	ZAR/UK Pound *	23,79	23,87	▲ 0,33 %
US c/kg Clean Certified **	1019	1004	▲ 1,49 %	USD/AUD *	0,6442	0,6494	▲ 0,80 %
Euro c/kg Clean Certified **	876	879	▼ 0,34 %	AWEX EMI c/kg Clean	1247	1239	▲ 0,65 %
Percentage Difference (Weighted): Non-Certified and Certified Merino Fleece Wools Sold ***							▲ 9,08 %
* 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) - 202501											
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	191,24	189,26	182,45	179,62	177,17	171,65	167,73	166,88	166,84	164,95	164,08
Certified Wool (R) Clean	213,02	208,14	203,44	199,72	191,96	185,62	181,64	180,84	181,32	181,02	180,07
% Difference	▲ 11,39 %	▲ 9,98 %	▲ 11,50 %	▲ 11,19 %	▲ 8,35 %	▲ 8,14 %	▲ 8,29 %	▲ 8,37 %	▲ 8,68 %	▲ 9,74 %	▲ 9,75 %
* Certified Sustainable Wool: Includes Responsible Wool Standard & Sustainable Cape Wool Standard.											

* Certified Sustainable Wool (Bales)			
		% Share **	
	Total	All Wool	Merino Wool
Offered	6 021	56,3 %	63,3 %
Sold	5 806	58,7 %	61,6 %
* 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 (202401)
Turnover (R)	136 144 702	167 974 518	136 144 702	144 029 622
# Bales	8 568	11 307	8 568	8 770
Mass (kg)	1 311 248	1 768 967	1 311 248	1 383 671

Wool Receivals Declared (Greasy)				
Current Season	Mass (kg)	Previous Season	Mass (kg)	% Change (Y-o-Y)
2025/26	3 863 402	2024/25	4 847 685	▼ 20,3 %

Offering Analysis (Bales)								
Description	Catalogue Offering	Withdrawn before Sale	Wool Offered	Withdrawn during Sale	Passed	Not Sold	Sold	% Sold
BKB	5213	274	4 939	474	11	81	4 384	88,76 %
CMW	2276	58	2 218	15	5	19	2 184	98,47 %
JLW	172	41	131	-	-	-	131	100 %
MAS	883	40	843	-	-	21	822	97,51 %
QWB	1107	42	1 065	4	3	14	1 047	98,31 %
This Week	9651	455	9 196	493	19	135	8 568	93,17 %
Previous Week	12175	363	11 812	5	49	183	11 624	98,41 %

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Buyer Purchases (Bales - Greasy)			
	Bales		
Company	This Sale	% Share	Bales (YTD)
Tianyu SA	1 896	22,13 %	1 896
BKB Pinnacle Fibres	1 872	21,85 %	1 872
G Modiano SA	1 479	17,26 %	1 479
Stucken & Co	1 273	14,86 %	1 273
Standard Wool SA	1 034	12,07 %	1 034
VBC Wool SA	373	4,35 %	373
Lempriere SA	336	3,92 %	336
Segard Masurel SA	305	3,56 %	305

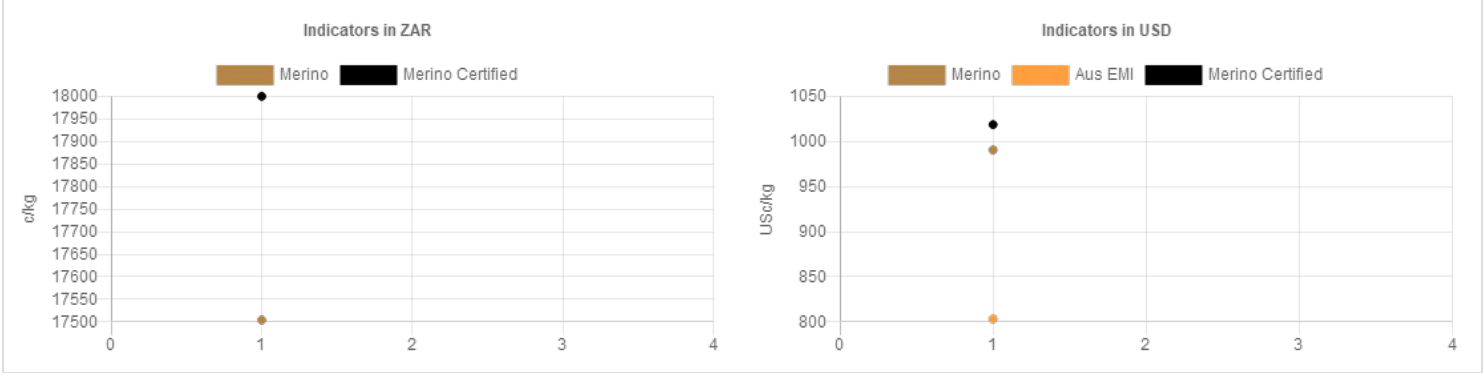
Sale Analysis (Length, Micron & Class - Bales)									
	This Sale			Previous Sale			Accumulative		
	Offered	Sold	% Sold	Offered	Sold	% Sold	Offered	Sold	% Sold
All Wool									
<i>Length</i>									
Long	4 784	4 607	96,3 %	4 327	4 307	99,54 %	4 784	4 607	96,3 %
Medium	3 341	3 034	90,81 %	5 032	4 880	96,98 %	3 341	3 034	90,81 %
Short	1 068	924	86,52 %	2 216	2 116	95,49 %	1 068	924	86,52 %
Mixed	3	3	100 %	30	-	-	3	3	100 %
<i>Micron</i>									
Fine Wool: =< 20 Micron	6 130	5 659	92,32 %	7 783	7 665	98,48 %	6 130	5 659	92,32 %
Medium: 20.1 to 22	2 365	2 283	96,53 %	3 083	2 982	96,72 %	2 365	2 283	96,53 %
Strong: 22.1 to 24	497	440	88,53 %	495	432	87,27 %	497	440	88,53 %
Over Strong: > 24.1	204	186	91,18 %	257	228	88,72 %	204	186	91,18 %
<i>Class</i>									
Fleeces	6 451	6 163	95,54 %	7 913	7 808	98,67 %	6 451	6 163	95,54 %
Bellies	841	687	81,69 %	1 195	1 141	95,48 %	841	687	81,69 %
Pieces	1 122	1 063	94,74 %	1 128	1 099	97,43 %	1 122	1 063	94,74 %
Locks	778	651	83,68 %	1 339	1 255	93,73 %	778	651	83,68 %
Other	4	4	100 %	43	4	9,3 %	4	4	100 %

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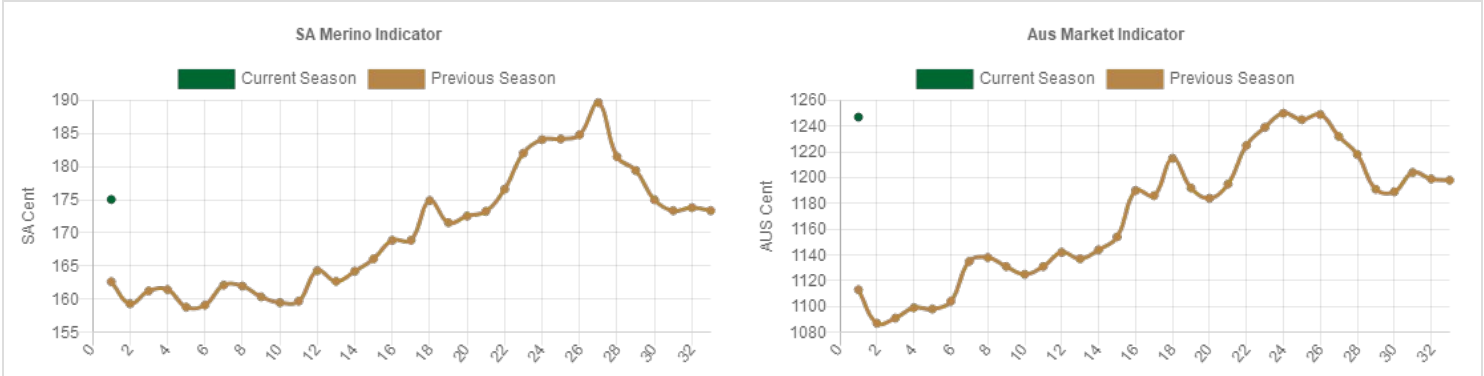
Analysis of Bales Sold (Micron, Length & Style)										
	<=18.0	18.5	19.0	19.5	20.0	20.5	21.0	21.5	22.0	>=22.5
Length										
Long	297	436	539	809	649	680	318	194	138	61
Medium	327	460	368	329	273	241	116	127	113	68
Short	182	175	133	113	49	36	25	13	3	4
Mixed	-	-	3	-	-	-	-	-	-	-
Style (AWEX)										
Style 4 & Better	148	230	330	441	362	439	173	93	92	26
Style 5	504	635	543	614	482	393	173	168	81	76
Style 6	142	199	155	174	93	96	88	43	67	24
Style 7 & Poorer	12	7	12	22	34	29	25	30	14	7

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	173,81	-	157,99	164,09	-	-	-	-	-	-	-
50 mm	Non-Certified	-	180,96	159,99	161,97	-	-	-	151,34	-	-	-
	Certified	190,18	-	169,81	179,63	181,70	-	-	-	-	-	-
60 mm	Non-Certified	-	185,04	-	175,70	168,89	167,14	162,84	-	-	-	-
	Certified	197,28	194,05	188,28	185,42	184,12	171,23	173,18	176,13	172,33	-	-
70 mm	Non-Certified	191,59	-	186,32	-	179,49	172,34	169,64	167,21	167,35	165,91	-
	Certified	211,90	211,77	206,85	201,90	192,03	184,90	179,80	180,11	182,46	180,41	178,77
80 mm	Non-Certified	-	-	187,13	198,58	177,92	-	169,88	168,91	168,17	-	-
	Certified	-	213,05	202,00	-	192,30	184,42	184,25	-	-	181,21	-
Merino Fleece, AWEX Style 5 - MF5												
40 mm	Non-Certified	-	147,39	152,31	137,08	-	143,01	131,86	124,98	-	129,45	106,19
	Certified	162,25	153,06	160,32	160,21	161,38	-	134,80	-	124,32	-	-
50 mm	Non-Certified	163,32	170,99	155,95	158,75	157,75	146,87	145,39	-	147,24	140,48	-
	Certified	186,50	185,08	178,08	172,94	167,70	170,52	-	169,03	-	163,21	-
60 mm	Non-Certified	182,96	179,58	176,89	164,20	163,10	164,01	163,31	155,21	164,92	159,80	-
	Certified	196,93	165,59	183,85	180,51	179,55	167,91	175,39	178,03	174,39	174,06	159,58
70 mm	Non-Certified	-	188,87	175,90	174,30	174,48	168,58	161,89	167,23	158,62	164,05	-
	Certified	179,92	205,99	191,22	187,26	187,47	181,36	175,69	175,91	177,67	174,65	-
80 mm	Non-Certified	-	186,93	-	-	174,53	165,47	167,81	168,14	166,01	164,53	163,90
	Certified	-	196,32	205,53	210,01	186,06	186,65	181,84	-	183,93	-	179,27
Merino Fleece, AWEX Style 6 - MF6												
40 mm	Non-Certified	-	-	115,57	-	114,15	-	128,82	-	-	-	-
	Certified	-	-	-	-	-	-	-	-	-	-	-
50 mm	Non-Certified	-	144,26	-	128,52	138,40	127,33	-	-	118,60	-	-
	Certified	-	-	-	-	-	-	-	-	-	-	-
60 mm	Non-Certified	175,44	-	160,27	143,71	144,08	-	-	-	134,28	153,61	-
	Certified	-	-	-	-	-	-	-	160,90	-	-	-
70 mm	Non-Certified	-	-	-	-	138,21	145,96	158,84	141,42	164,55	-	-
	Certified	-	-	179,14	-	-	-	-	163,10	-	-	-
80 mm	Non-Certified	-	-	-	-	-	139,73	-	-	-	-	-
	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

