

Wool Market Report

M04

Wednesday, 23 July, 2025

The Australian wool market held the final sale before the annual three-week mid-year recess this week. This sale has the potential to behave in one of two ways. Buyers needing to fill orders, have this final auction buying opportunity in which to do so. This can result in pressure on specific pockets of the market, as buyers compete over similar lots needed to complete their export orders. This in turn can lead to an upward turn in the market. The potential downside of the break, is that some buyers are reluctant to start new orders, knowing that filling the order before the break could be problematic. In welcome news to woolgrowers, it was the first scenario that transpired this week. With 37,946 bales available to the trade, competition was often fierce across specific wool types, as buyers fought to complete orders needed for immediate shipment. Fremantle selling only on the first day, was yet to enjoy the rises on offer in the previous series. The Western region heads into the recess on a buoyant note after a strong finish. The Western Micron Price Guides (MPGs) closed between 19 and 31 cents higher. In the East the market pushed further into positive territory, adding further gains to those experienced over the previous few weeks. The Eastern MPGs increased by between 5 and 38 cents. The benchmark Eastern Market Indicator (EMI) added 18 cents for the week, closing at 1,239 cents. The market continues to enjoy a strong start to the 2025/26 wool selling season. The EMI has risen across all four-selling series of the new season. In further positive news, although playing its part, currency was not the driving influence on the market. The EMI rose by a similar amount in USD terms. The market is now in recess. Sales will resume week beginning Monday the 18th of August.

	This Week	Last 12 Months		
		High	Low	Avg
Sth Ind	1219 +15	1237	1061	1152
17	1706 +5	1735	1602	1676
17.5	1673 +11	1696	1530	1616
18	1633 +28	1648	1433	1555
18.5	1582 +27	1612	1370	1501
19	1528 +28	1570	1326	1459
19.5	1486 +12	1539	1282	1428
20	1473 +11	1519	1266	1403
21	1461 +17	1510	1232	1378
28	505 +8	505	362	419
MC	699 +6	751	645	693

USD	65.70¢
▲	0.44¢
EUR	55.99¢
▼	-0.20¢

Main Buyers (This Week)

Techwool Trading	2,935	16.6%
Endeavour Wool Exports	2,089	11.8%
Australian Merino Exports	1,890	10.7%
Fox & Lillie	1,455	8.3%
PJ Morris Wools	1,405	8.0%
United Wool Company	1,392	7.9%
Sequoia Materials	1,265	7.2%
Tianyu Wool	1,161	6.6%

Mic	Grsy	CIn	Yld	MM	NKT	VM	District	AWEXID
14.8	1050	1970	53.3	65	34	0.9	GLENAROUA	MWF6S.
15.5	1472	2008	73.3	68	43	0.2	SWANSEA	MWF4E.
16.6	1366	1819	75.1	81	56	0.6	SWANSEA	MF4E.
16.9	1281	1722	74.4	75	37	1.3	NEW NORFOLK	MF4S.
17.4	1275	1763	72.3	71	34	0.2	WILLAURA	MF4E.
17.6	1230	1775	69.3	71	45	0.6	MOYSTON	MF5S.
18.2	1212	1681	72.1	101	37	0.6	RHYMNEY	MF4S.H1
18.5	1240	1673	74.1	92	53	0.4	JERICO	MF4E.
19.5	1060	1638	64.7	90	36	1	GUNDAGAI	MF5S.
20.4	1034	1628	63.5	80	47	0.5	MT MERCER	MF5E.
15	839	1658	50.6	63	29	3.7	GLENAROUA	MWP5S.
15.7	941	1622	58	59	43	1.2	WOORNDON	MWP5S.H1P1
16.5	951	1546	61.5	85	40	1.7	SWANSEA	MP4S.
17.1	912	1608	56.7	94	37	2.4	WOORNDON	MP5S.H1
17.6	1047	1591	65.8	80	44	2.2	JERICO	MP4S.
22.9	720	954	75.5	60	0	0.2	TELANGATUK EAST	XWF4E.
23.5	489	689	71	59	53	0.8	WOODBURY	XWF5E.
24.5	675	931	72.5	110	0	0.6	TELANGATUK EAST	XF5E.
27	307	477	64.4	100	0	2.3	BORDERTOWN	XF5S.
28.4	342	487	70.2	100	0	1.1	BERRIGAN	XF5S.

Indicative Forward Pricing

MPG	Aug-25	Sep-25	Oct-25
19	1490	1460	1430
21	1431	1401	1371
28	474	444	414

