

# BroaderView

FOR NON-MERINO WOOLGROWERS

JUNE 2025



## AWI working for all woolgrowers

AWI CEO John Roberts provides an update for non-Merino woolgrowers about the current market for wool and AWI's work to help increase the demand for their fibre through investments in marketing and R&D.

### Market for wool anticipated to strengthen

Despite global economic conditions not delivering the wool prices right now that woolgrowers deserve, I believe that the fundamental benefits of wool and long-term consumer trends play in wool's favour.

The decline in wool prices for the broader microns in Australia ended about two years ago and prices have been recovering ever since, albeit slowly and from a low base. There is still a long way to go before they reach pre-COVID levels.

Poor prices for broad wools have not been restricted to Australia but have been a global phenomenon seen in many other wool producing nations across the world for a number of years, although broad wool prices globally also seem to have bottomed out and are beginning to slowly recover.

Challenging global economic conditions have had a negative impact on the whole global wool industry post-COVID, which has negatively affected the price that all Australian woolgrowers receive for their wool. However, the EMI has performed better during the past twelve months which is encouraging and hopefully a positive sign for all microns going forward.

Globally, interior wool production is now about 55% of global wool production while apparel wool production is at about 45%. For a few decades prior to 2007, the split favoured apparel over interiors and homewares.

Since COVID, broad wools of 26 to 30 micron had been sitting underneath the values being paid for cotton, acrylic and polyester. However, the past 18 months have seen the price of most of the extruded synthetic fibres and cotton alternatives to wool fall below broader wool values.



Despite better gains for synthetics recently, the broader types have done enough to stay above the value of synthetics and cotton as broader wools regain favour with textile businesses.

### Marketing all Australian wool

AWI's marketing of Australian wool, irrespective of the micron, is beneficial to the demand for all wool including broader wools. For example, our marketing of wool's eco-credentials, its breathability, fire resistance and anti-odour properties applies to all Australian wool: broad, medium and fine.

The Campaign for Wool has been instrumental in promoting the natural and sustainable benefits of all microns of wool to consumers. It is helping to reconnect markets with the fibre's wide variety of uses including interior products as well as apparel and accessory products.

Similarly, many of our educational initiatives, such as the Woolmark Learning Centre and Learn About Wool programs, provide resources to textile professionals and students about the broader as well as finer microns.



A special Interiors edition of The Wool Lab sourcing guide to the world's best commercially available wool fabrics features swatches suitable for a wide range of interior products. It has helped inspire brands' material strategies and forge strong relationships within the supply chain, thereby increasing the demand for your wool.

Many of our Woolmark licensees manufacture and sell products made from broad wool (such as bedding products and floorcoverings) and use the Woolmark logo in their marketing activities. We have more than 100 Woolmark licensees that market interior textile wool products with the help of the Woolmark brand. These companies are located worldwide, from right across Europe, through Asia to the Americas and here in Australia.

The trend towards sustainability in the textile industry has continued to get stronger – and as a natural, renewable and biodegradable fibre, wool of every micron is well placed to take advantage. We have had positive results from our environmentally focused global campaigns that have highlighted wool's advantages due to it being a natural, renewable and biodegradable fibre. The campaigns have urged consumers to consider the fibre composition of a product – and choose wool – when they are thinking of making a purchase. This applies not just to clothing products, but equally to interiors products.

Wool can play an increasingly large role in homes and offices, in products as far ranging as upholstery, curtains, bedding, rugs, lighting, artworks and decorative objects. The consumer trend towards health and wellness is another big trend that plays in favour of all wool. With its luxurious finish, easy-to-care-for nature and health properties, wool is the natural choice for any interior.



## On-farm R&D and extension

AWI's on-farm R&D and extension projects largely benefit all Australian woolgrowers, irrespective of the breed of their sheep and micron of their wool.

We continue to invest in areas that producers have told us are important to them. Most of our on-farm R&D projects benefit growers of broader micron wool, including projects aimed at increasing the reproductive efficiency of ewes; optimising sheep health and welfare; making wool harvesting easier; environmental sustainability; combatting wild dog, fox and feral pig attacks; and harnessing opportunities for on-farm automation.

In addition, we deliver practical training programs through our extension networks in each state to increase producers' adoption of best practice on-farm production and management. We also provide timely market intelligence to woolgrowers, hold many face-to-face industry events, and we run projects to encourage the next generation into the industry.

You can read about these and other on-farm R&D and extension programs in this edition of *The Broader Wool*.



## Strategy for the future

The 10-year strategy for Australian woolgrowers, Wool 2030, released in December 2020, includes activities to "develop new products, for wools of all microns, that build on wool's strengths, in conjunction with commercial partners" and "grow the presence of Australian wool of all microns in markets (geographical and by segment) that deliver the highest returns". AWI's new three-year Strategic Plan for 2025–26 to 2027–28 will align with Wool 2030.

Consultation and engagement with woolgrowers and stakeholders from all sectors of the industry remain a priority for AWI. To help enable this, a broad wool representative is one of the members that comprise AWI's Woolgrower Industry Consultation Panel (WICP).

I have a healthy optimism in the long-term future for Australian wool and AWI will continue to work hard on behalf of the producers that grow this great fibre. I provide you with my assurance that AWI, your R&D and marketing company, will continue to operate for the benefit of all woolgrowers.







# On-farm R&D investments benefiting non-Merino woolgrowers

AWI's on-farm R&D and extension projects largely benefit all Australian woolgrowers, irrespective of the breed of their sheep and micron of their wool. Here are some of the highlight projects and sources of more information.

## Reproduction and nutrition

AWI research is focused on the main factors influencing the productivity of sheep reproduction, including producer education and best practice management, ewe nutrition and supplementary feeding, mob dynamics and climate variability on sheep reproductive health.

**Pregnancy scanning** – AWI and Meat & Livestock Australia have produced extension material that clearly demonstrates the value of pregnancy scanning to increase farm profitability. During the research, scanning for multiples increased profit by an average of \$5.55 per ewe scanned, with an average return on investment of 400%. The extension material also explains what's involved with pregnancy scanning and how to best manage ewes once they have been scanned.

| [wool.com/lambing](http://wool.com/lambing)

**Lifetime Ewe Management** – This course provides hands-on on-farm training over a year, for small groups of producers (about 5-7) in the management and nutrition of breeding ewes to maximise reproduction rates, and lamb and ewe survival.

| [wool.com/LTEM](http://wool.com/LTEM)

**AWI Repro Masterclass™** – This workshop is a one-stop-shop for the latest research, benchmarks, targets and tools for all things repro. It provides a refresher on the best ways to improve the reproductive performance of your flock.

| [wool.com/workshops](http://wool.com/workshops)

**RAMping Up Repro** – This workshop is designed to give producers the skills to improve ram health, performance and longevity in their sheep breeding enterprises.

| [wool.com/workshops](http://wool.com/workshops)

**Feedbase options** – Choosing the right pasture mix for your enterprise and location is essential, particularly in a more variable climate.

AWI invests in pasture breeding, selection and commercialisation to make available to woolgrowers a suite of high-performance feedbase options that support profitable, sustainable wool production.

| [wool.com/feedbase](http://wool.com/feedbase)

## Sheep health and welfare

AWI's R&D investment is focused on ensuring producers have access to the latest in information and tools to improve the lifetime health and welfare of their sheep.

**Flystrike extension program** – AWI continues to help woolgrowers improve the lifetime welfare of their sheep, reduce their reliance on mulesing, optimise chemical use and increase whole farm profitability:

**It's Fly Time!™** – Practical, just-in-time information in the lead up to, and during, high-risk flystrike periods.

**DemystiFly™** – Practical information about managing chemical resistance in blowflies.

**SimpliFly™** – A one-day workshop to develop a property-specific, strategic flystrike management plan.

**ClassiFly™** – A one-day workshop to increase understanding and skills in breeding for flystrike resistance.

**StrateFly™** – A one-day workshop to develop a property-specific strategy for moving to a non-mulesed enterprise.

**AmpliFly™** – One-on-one coaching and support from an accredited advisor to assist you prevent and control flystrike.

| [wool.com/flystrikeresources](http://wool.com/flystrikeresources)

**Worms, lice and fly management** – ParaBoss is a suite of three web-based products (WormBoss, LiceBoss, FlyBoss) containing detailed management information to help sheep producers manage risks related to worms, lice and flies.

| [paraboss.com.au](http://paraboss.com.au)

## Wool harvesting

AWI has a multipronged approach to improving wool harvesting, through training, support and mentorship for new shearers, exploring new technologies and better use of technology.

**Training** – AWI funds shearing and wool handling training courses to attract and retain new entrants into the wool harvesting industry and increase workers' productivity, skills and professionalism. As a way of encouraging learner shearers to stay in the industry, AWI in partnership with Heinger also provides them with an AWI Learner Shearer Toolkit containing a handpiece and other shearing gear, subject to the shearer passing certain criteria.

| [wool.com/harvestingtraining](http://wool.com/harvestingtraining)

**Modular sheep delivery unit** – There are six companies across Australia manufacturing systems based on the AWI sheep delivery system designs. The AWI sheep delivery units provide a system that delivers sheep directly to the shearer, eliminating the time and energy that shearers spend on the catch and drag and minimising the chance of injury to the shearer. The design focuses on a 'modular' concept in which portable singular shearing stands can be joined together.

| [wool.com/sheep-delivery](http://wool.com/sheep-delivery)

**Biological wool harvesting** – The University of Adelaide has made strong progress in identifying the most effective biological agent to create a weakened zone at the base of the wool fibre that enables the fleece to remain securely on the sheep without a net until it can be mechanically removed. Researchers are now analysing 12 promising candidate agents to determine which, if any, are most suitable for this role. This critical evaluation phase will continue for several months, before consideration of a new two to three year phase of the project.

As a result, promising work by the University of Technology Sydney and the University of Wollongong on designing a device to harvest the weakened wool has been halted for now, while the focus remains firmly on confirming the agent.

| [wool.com/wool-harvesting-innovation](http://wool.com/wool-harvesting-innovation)

## Environmental sustainability

Aligning with the wool industry's Wool 2030 plan and the Sheep Sustainability Framework, AWI is addressing environmental sustainability issues such as biodiversity, soil health and pasture management, greenhouse gas emissions and climate change adaptation.

**Woolmark+ roadmap** – At its core, the Woolmark+ roadmap focuses on supporting the livelihoods of woolgrowers in their role as stewards of nature. It has been developed in response to increasing consumer and regulatory demands for low-impact products. The Woolmark+ roadmap will be delivered via a series of 13 initiatives, many of which are designed to support woolgrowers as they manage their natural assets for the benefit of their business.

| [wool.com/woolmarkplus](https://wool.com/woolmarkplus)

**Nature positive farming framework** – AWI has collaborated with woolgrowers and the supply chain (including brokers, certification schemes and brands) to develop 10 industry-informed metrics most relevant for measuring on-farm natural capital and environmental performance. Once operational, the specification will help woolgrowers, brands, and consumers better understand and promote wool's role in regenerating the environment and increasing the farm's resilience to drought and climate change.

| [woolmark.com/nature-positive-framework](https://woolmark.com/nature-positive-framework)

### National Sheep Methane

**Program** – This Program is a collaborative and coordinated effort between AWI and the departments of primary industries and universities in the main wool-producing states to implement practical and safe ways for producers to reduce methane emissions from Australian sheep grazing systems. The program's focus is on win/win solutions that reduce emissions and increasing productivity.

| [wool.com/meril](https://wool.com/meril)

**Advocacy for wool in the European Union** – European Union (EU) Product Environmental Footprinting (PEF) regulatory proposals pose a threat to the wool industry. AWI has been addressing the shortcomings of PEF on two fronts. Firstly, in the European Commission's PEF Technical Secretariat where AWI has been providing expert advice based on its science and research via the International Wool Textile Organisation. Secondly, in advocating to EU policymakers as part of the Make the Label Count campaign.

| [makethelabelcount.org](https://makethelabelcount.org)

## Vertebrate pests

AWI works with producers and other stakeholders to help achieve sustained control of wild dogs and other vertebrate pests.

**FeralScan™ pest animal tool** – FeralScan™ is a free, purpose-built, digital resource that Australian woolgrowers – plus other

landholders, community groups and professional pest animal controllers – can use to record and access information about the population of pest animals (such as wild dogs, foxes, rabbits and feral pigs) and their management in a local area. The use of FeralScan™ continues to grow, with more than 52,000 individuals registered to use the platform and 500 active local groups using it.

| [feralscan.org.au](https://feralscan.org.au)

### National Wild Dog Management

AWI co-funds the National Wild Dog Management Coordinator position which has led to significant progress being achieved in community-led wild dog management programs across the country.

| [wilddogplan.org.au](https://wilddogplan.org.au)



## Genetics

AWI aims to assist producers optimise their rate of genetic gain in their chosen breeding objective. While LAMBPLAN's terminal and maternal benchmarking service is most relevant to producers with a prime lamb breed focus, AWI continues to focus on a range of genetic projects that are relevant to all sheep producers.

**Visual Sheep Scores guide** – This guide provides the Australian sheep industry with a common language for the visual description, recording and classing of all breeds of sheep according to important visual traits.

| [wool.com/vss-2024](https://wool.com/vss-2024)

**Non-invasive cervical AI** – With increasing concern about invasive laparoscopic AI and use of an animal-based cycling product PMSG, AWI funded a five-year \$1 million project with the University of Sydney seeking to solve the low conception rates using frozen/thawed semen by the non-invasive cervical AI method. The project isolated down to four proteins that are impacted on freezing and thawing that reduces the 70% conceptions gained when using fresh semen by cervical AI compared to the 20% conceptions using frozen/thawed semen.

**Sexed semen** – Two recent projects have improved the semen diluents that better allow the semen to be 'drafted' into male and female sperm. This service is now available through Total Livestock Genetics. To date this has been adopted more by prime lamb breeders as they already have sufficient ewes and are looking to breed and sell more males.

| [tlg.com.au](https://tlg.com.au)

## Extension, education and leadership

AWI aims to help improve the engagement and motivation of producers, especially young people, in the industry.

**AWI Extension networks** – Through the AWI Extension networks, which are present in each state, AWI extends its R&D and training to producers across Australia, delivering localised industry information and events, and ultimately achieving measurable adoption and practice change.

| [wool.com/networks](https://wool.com/networks)

**Making More From Sheep** – This best practice package of information and tools for Australian sheep producers contains the very best information on sheep and wool production.

| [makingmorefromsheep.com.au](https://makingmorefromsheep.com.au)

**Young producer initiatives** – AWI supports several initiatives including the Breeding Leadership course, the Hay Inc rural traineeship program, and SA Sheep Expo, amongst others.

| [wool.com/breeding-leadership](https://wool.com/breeding-leadership)  
| [hayinc.com.au](https://hayinc.com.au)  
| [sasheepexpo.com.au](https://sasheepexpo.com.au)

## Communication and market intelligence

AWI ensures a two-way dialogue with stakeholders and enables AWI to work closely with partners in developing its activities.

**Consultation** – AWI has two forums through which it engages with woolgrower representative bodies. The AWI Woolgrower Industry Consultation Panel (WICP) comprises a core group of members from nine national woolgrower organisations, including a broad wool representative. The AWI Woolgrower Consultation Group (WCG) is a broader group comprising 28 representatives of state and regional production-based woolgrower groups, as well as the members of the WICP.

| [wool.com/consultation](https://wool.com/consultation)

**Communication** – Producers can keep up to date via regular communications from AWI: *Beyond the Bale* quarterly magazine and e-newsletter, *The Yarn* weekly podcast, Woolgrower monthly e-newsletter, wool.com website, social media (Facebook, X, Instagram, YouTube) and in person at the many sheep and wool events that AWI attends.

| [wool.com/btb](https://wool.com/btb)  
| [wool.com/podcast](https://wool.com/podcast)  
| [wool.com/subscribe](https://wool.com/subscribe)

**Market intelligence** – AWI disseminates a range of market intelligence information via various channels including: daily wool market reports available via SMS, weekly wool market reports and prices via email, monthly market intelligence reports, and market intelligence on wool.com.

| [wool.com/marketintel](https://wool.com/marketintel)