

WOOL INDUSTRY CONSULTATIVE PANEL (WICP)

Date: 15th April 2025

Venue: Via Microsoft Teams and at Level 2, 345 George St Sydney – King Meeting Room.

Purpose of this forum is to ensure clear, two-way consultation between AWI and organisational representatives, through to growers. The meeting provides an opportunity for the AWI Board to receive and provide feedback on current/important issues and relevant topics from Board meetings.

AWI Business Unit Update

AWI Chair and CEO gave the WICP the following updates.

- AWTA LTD has tested 230.4mkg as at the end of March 2025, which is 8.9% down on the same period last year. The split for each state is shown in the below table.

AWTA KTD End Mar 2025	2024/25	2023/24	tonnes diff.	% diff.
New South Wales	88,377	92,702	-4,325	-4.67%
Victoria	54,314	57,316	-3,002	-5.24%
Queensland	5,877	6,149	-272	-4.42%
South Australia	34,538	40,164	-5,626	-14.01%
Western Australia	40,160	48,841	-8,681	-17.77%
Tasmania	7,100	7,810	-710	-9.09%
TOTAL	230,366	252,982	-22,616	-8.94%

The biggest changes can be seen in WA and SA primarily due to changes in government policy and seasonal conditions respectively.

- Work has commenced to enhance the existing suite of AWI Flystrike extension program materials by adding them to the Woolmark learning centre. Podcast episodes will also soon be available on this topic.
- Investment has continued into projects including-
 - Sterile Insect Technique for blowfly control
 - National Wild Dog Management action plan
 - Best sheep/wool management practices
 - Sheep breeding genomic projects
 - Assisting growers in measuring on-farm natural capital income streams such as carbon and biodiversity markets
 - Biological wool harvesting
 - EU Product Environmental Footprint rating scheme (PEF)
 - Summarising the evidence and research into wools' dynamic breathability and wellbeing attributes.
- Chinese manufacturers continue to seek throughput in their machines and lately have been purchasing the 20 to 21 micron wools due to their price point, hence the recent outperformance in this micron range.
- So far in the 24/25 financial year, AWI has trained and upskilled 3,636 participants across 1,337 AWI training days. A total of 53 Learner toolkits have been issued to full time learner shearers.
- YTD Revenues (end of February 2025) for AWI totalled \$38.8M against a budget of \$37.7M. Wool levy income is in line with budget helped by the recent increase in the EMI.
- YTD Expenditure (end of February 2025) for AWI totalled \$38.6M against a budget of \$42.8M

Processing and Innovation update

Kelly McAvoy - Program Manager Education and Extension

- There are currently 89 projects in Processing Innovation and Product design (PIPD).
- Knitting innovations include circular seamless and whole garment knitting, which both result in zero waste.
- There continues to be positive momentum in wool denim, swimwear, sports performance wear and footwear.

International Intelligence Briefing

Jeff Ma – China Country Manager

- The Chinese economy has expanded during Q1 of 2025 with retail sales growing over 4% over Chinese New Year.
- At this stage the expectations are that the Chinese government will stimulate the economy if required due to any negative tariff influences.

AWI's strategic Plan

AWI have taken the feedback from both the WICP and WCG to the Board. The Strategic Plan is now currently being tweaked with a final draft to be provided to consultation groups on the 12th May 2025 which will allow them a further opportunity for input prior to the plan being released in early July 2025.

The next WICP meeting will be held on the 29th July 2025.

Nick Turner

WICP Independent Chair