Beyond the bale

Thinking past the farm gate PAGE 8

ISSUE 106 SEPTEMBER 2026 AUSTRALIAN WOOL INDUSTRY WOOL.COM

"Sometimes the biggest opportunities aren't found in the paddock. They are found by thinking differently."

TOM HOOKE,
AWI NUFFIELD SCHOLAR

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Bryan Fry
Chief Executive Officer
Australian Wool Innovation

AWI WORKING FOR WOOLGROWERS

AWI CEO Bryan Fry provides readers with an overview of how AWI is undertaking R&D and marketing to address some of the key issues faced by Australian woolgrowers.

It's my pleasure to write to you for the first time as CEO.

Since starting in the role in March, I have been on a steep learning curve on all the ways AWI/Woolmark works for woolgrowers and champions Australian wool in the global arena.

As your research, development and demand creation company we will continue to champion initiatives to keep our industry competitive from the paddock right through to the finished product.

In pulling together the September edition a theme quickly emerged – shaping wool's future – both on and off farm.

It is a great read that profiles some of the outstanding people in our industry including Tom Hooke, Emily Stretch and Michael Wright who share invaluable insights on and why they are so positive about growing wool.

We also profile Bridgitte Brooks a fifth generation WA woolgrower and founder of the Homestead Road fashion label that focuses on activewear – one of the promising growth areas for wool.

Converting knowledge gained from AWI Extension workshops into improved on-farm operations is the gold standard we aspire to, and we profile how Ben Johnson has successfully done that.

Our aim with this edition is to showcase what AWI is all about, creating, innovating & educating to create opportunities benefiting the Australian wool industry.

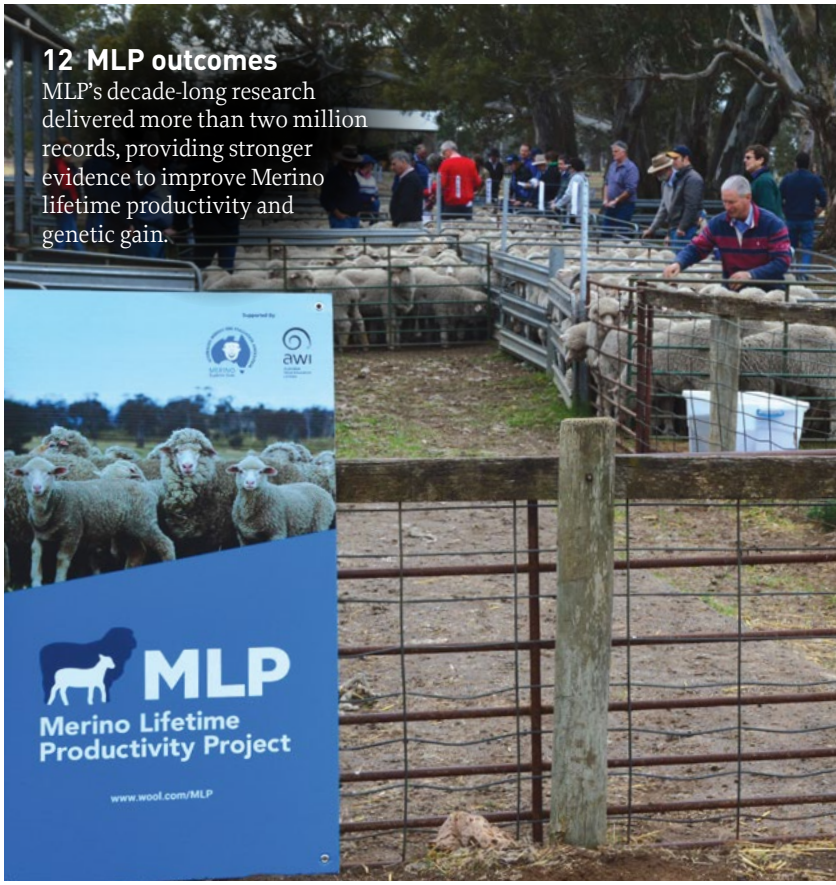
We acknowledge that sometimes these opportunities take longer to be realised like the ten years needed and millions of data points measured for the Merino Lifetime Productivity Project. This project has now achieved an important milestone with findings to share and lessons that can be applied in your business.

There is also an update on development of a vaccine for flystrike, it's a complicated, high-risk project, focused on a potentially high return and an area we continue to invest our human and financial efforts.

We also have stories on Victorian woolgrower Jim Gall whose day job is CEO of RB Sellars, collaborating with Cotton Australia to take on synthetic fibres, upskilling retail staff so they know just how wonderful and versatile wool is, plus inspiring high school students to consider a career in wool.

There is also detailed reporting on the wool market and the National Wool Declaration plus our handy resource guide.

Thanks for being a woolgrower and producing the world's greatest natural fibre, and please enjoy this edition.



12 MLP outcomes
MLP's decade-long research delivered more than two million records, providing stronger evidence to improve Merino lifetime productivity and genetic gain.

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Market intelligence report

Here we look at the market's strong start in 2026 and the potential drivers impacting production and demand over the coming months.

Steady start to the 2026–27 season

The 2026–27 Australian wool selling season has opened with supply at historically low levels, providing an important foundation for prices despite considerable early-season volatility. National offerings are running below last season and the latest production outlook points to continued tight availability, with the August Wool Production Forecast for 2026–27 of 249.3 million kilograms greasy, down 1.8% year-on-year.

This tight supply was a key feature of the strong Week 9 (27 August) rebound. After falling to 1,812 A¢/kg in Week 8, the Eastern Market Indicator recovered 41 cents to 1,853 A¢/kg as buyers competed for just 23,651 bales, the smallest three-centre offering since 2020. The market strengthened across most Merino categories, while the national pass-in rate fell to only 2.0%, highlighting the intensity of competition for available wool.

Improved seasonal conditions have lifted production expectations from earlier forecasts, although any production recovery will take time given the reduced national flock. Hence supply is likely to stay top of mind for buyers as Chinese domestic demand remains strong and early-stage processor inventories decrease.

Australian 2025–26 wool production by volume

Table 1. AWTA key test data for the 2025–26 season

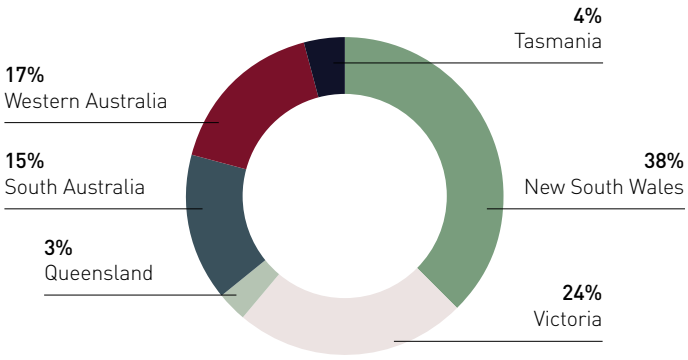
	State Share	2025–26 (tonnes)	2024–25 (tonnes)	Tonnes difference (tonnes)	% Difference
New South Wales	38%	102,761	114,069	-11,308	-9.9%
Victoria	24%	64,205	69,557	-5,352	-7.7%
Queensland	3%	8,005	8,081	-76	-0.9%
South Australia	15%	39,649	43,703	-4,054	-9.3%
Western Australia	17%	47,255	49,921	-2,666	-5.3%
Tasmania	4%	9,845	10,099	-254	-2.5%
TOTAL	**100%**	**271,720**	**295,430**	**-23,710**	**-8.0%**

Australian wool production, as measured by AWTA key test data, declined by 8.0% year-on-year to 271.7 million kilograms for the 2025–26 season, representing a national reduction of 23.7 million kilograms. All states recorded lower testing volumes, confirming that the contraction in wool supply was broad-based rather than concentrated in a single region.

New South Wales accounted for the largest absolute decline, with volumes falling by 11.3 million kilograms, or 9.9%, and remained the largest producing state with a 38% share of national supply. Victoria and South Australia also recorded substantial reductions of 7.7% and 9.3% respectively. Together, these three states contributed almost 88% of the total national decline, highlighting the extent to which weaker production across the eastern and southern wool-growing regions shaped the national result.

Western Australia recorded a smaller decline of 5.3%, while Queensland and Tasmania were comparatively stable, down 0.9% and 2.5% respectively. Although these states provided some moderation, their smaller production shares were insufficient to offset the larger reductions elsewhere.

Figure 2. AWTA state testing breakdown



AWTA test data for the 2025–26 season shows that New South Wales accounted for the largest share of wool tested, at 38% of the national total. Victoria contributed a further 24%, followed by Western Australia at 17% and South Australia at 15%. Tasmania and Queensland represented smaller shares, at 4% and 3% respectively. Together, New South Wales and Victoria accounted for almost two-thirds of the wool tested during the season.

Wool Auction Offering Update – AWEX Auction Data – 25–26 Season

- Offered 1,496,803 bales compared to the 1,541,414 bales offered last season. That is 44,611 bales less, or 2.9% less wool offered.
- Sold 1,402,559 bales compared to the 1,419,576 bales sold last season. That is 17,017 bales less, or 1.2% less wool sold.
- Clearance rates this season are running at 93.7% compared to 92% cleared over the same period last season.
- Total value sold through the auction system is A$2,614 million, compared to A$1,940 million last season at the same time. This is an increase of A$675 million in value of wool sold.

The data points to a market where lower wool supply has been more than offset by stronger prices and improved buyer demand. While auction offerings are down 2.9%, sales have fallen by only 1.2%, indicating that a greater proportion of the available wool is being absorbed by the market. This is reflected in the clearance rate rising from around 92% to 93.7%.

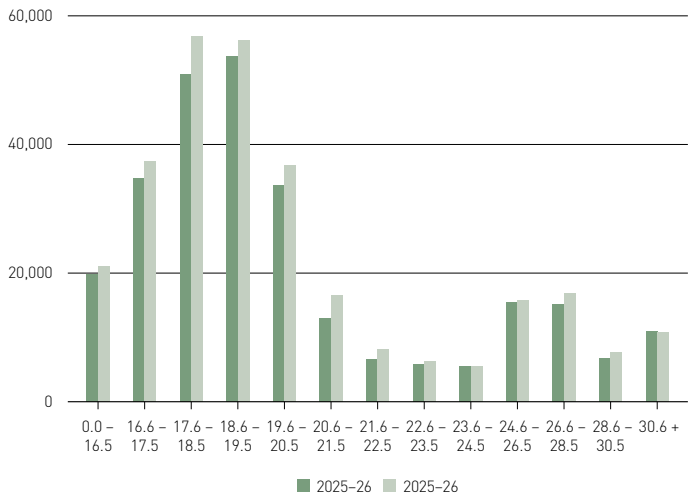
The number of bales not sold has fallen from approximately 121,800 last season to 94,200 this season – a reduction of about 22.6%. This suggests growers have been more willing to meet the market, buyers have been more active, or a combination of both.

The most significant result is the rise in total auction value. Despite 17,017 fewer bales being sold, the value of sales has increased by about A$674–675 million, or almost 35%. The implied average value per bale has risen from approximately A$1,367 last season to A$1,864 this season, an increase of around 36%.

The 2025–26 auction market was characterised by reduced supply, stronger clearance rates and substantially higher returns per bale. This indicates that price strength, rather than increased volume, is driving the large rise in the value of wool sold through the auction system.

Production by Micron – AWTA Testing Data – 25–26 season end

Figure 3. Australian Micron Profile



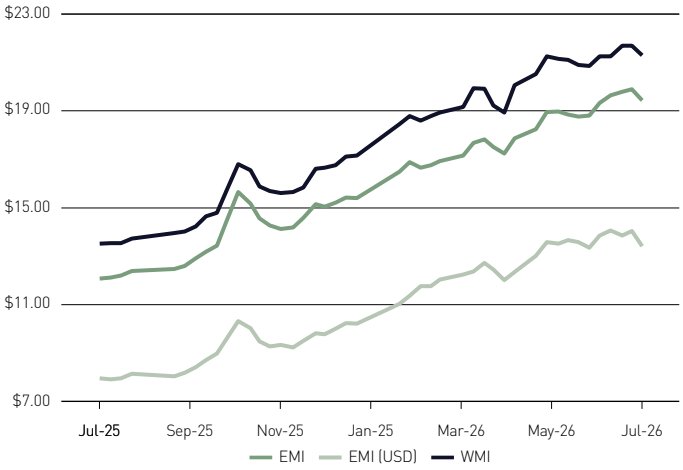
The AWTA testing data indicates that wool production was lower across most micron categories in 2025–26 compared with the previous season. The largest volumes remained concentrated between 17.6 and 20.5 microns, confirming that fine and medium Merino wool continued to dominate the Australian clip. However, each of these major categories recorded a year-on-year decline, with the reduction particularly noticeable in the 17.6–18.5 micron range.

The sharpest proportional falls appear in the 20.6–22.5 micron categories, suggesting a more pronounced contraction in production of broader Merino and fine crossbred wool. Volumes below 17.5 microns also declined, although the reduction was less severe.

Production was comparatively stable between 23.6 and 26.5 microns, while the 30.6-micron-and-broader category was one of the few segments to record an increase. The data suggests the decline in the Australian wool clip was broadly distributed, rather than being confined to one micron category, but was most evident across the central Merino ranges that account for the largest share of national production.

Wool Pricing Update – 25–26 season

Figure 4. 2025–26 EMI and WMI monthly price



The pricing data shows a strong upward trend across the 2025–26 season, with all three indicators finishing well above their opening levels. The EMI rose from around $12.00 per kilogram clean at the start of the season to about $19.50 by season end, an increase of roughly 60%. The WMI followed a similar path, climbing from approximately $13.50 to above $21.00, while the EMI in US dollar terms increased from about US$8.00 to around US$13.50.

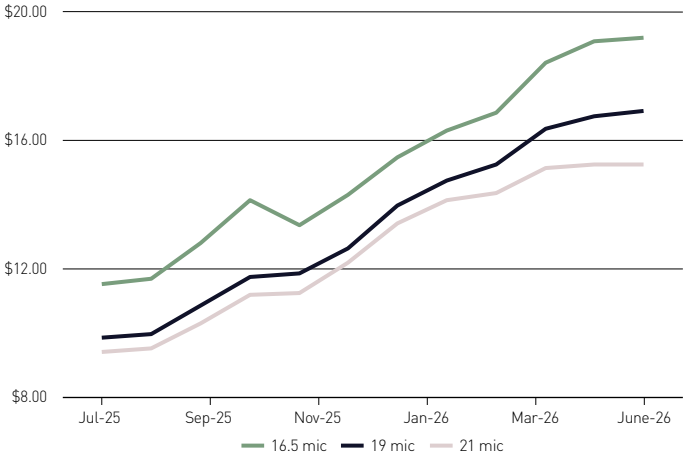
Price growth was not continuous. The market rose sharply in October, eased through November, and then resumed its upward movement from December. Further volatility occurred during March and April, but the broader trend remained positive, with prices reaching their highest levels in May and June.

The WMI remained above the EMI throughout the period, indicating stronger relative pricing in the Western Australian market. The gap between the Australian-dollar EMI and the US-dollar EMI also widened during parts of the season, showing that exchange-rate movements influenced the returns seen by overseas buyers and Australian sellers.

The chart points to a significantly stronger wool market in 2025–26. Prices increased despite lower auction volumes, supporting the view that reduced supply, firm demand and improved clearance rates contributed to stronger competition for available wool. The small decline at the end of the season suggests some late easing, but prices remained substantially higher than at the beginning of the period.

Wool Pricing Update – 25–26 season (continued)

Figure 5. 2025–26 season Merino wool micron pricing

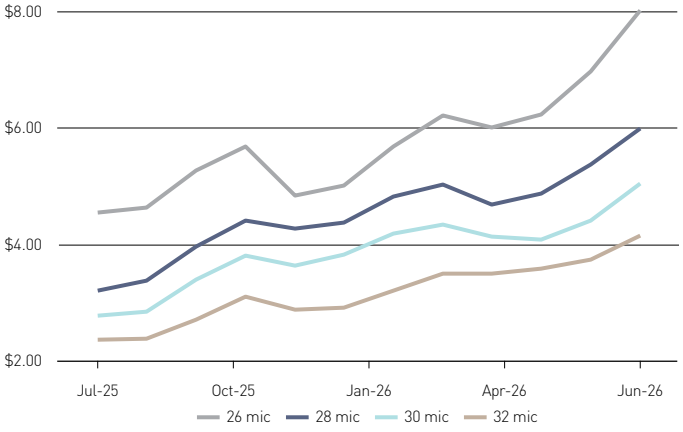


Micron prices strengthened markedly through the 2025–26 season, with the finest wool recording the largest gains. The 16.5-micron indicator rose from about $11.00 per kilogram clean in July to just above $19.00 by June, an increase of roughly 74%. Prices for 19-micron wool increased from around $9.50 to $16.80, while 21-micron wool rose from about $9.00 to $15.20.

The three micron categories followed a similar pattern. Prices climbed steadily through winter and early spring, rose sharply in October, then eased in November before resuming their upward trend. The strongest gains occurred from January to April, after which price growth slowed and the indicators began to level out.

The premium for finer wool widened as the season progressed. The gap between 16.5-micron and 21-micron wool increased from about $2.00 per kilogram clean at the start of the season to nearly $4.00 by June. This indicates particularly strong demand for superfine wool relative to broader micron categories.

Figure 6. 2025-26 season crossbred wool micron pricing



Crossbred wool prices strengthened across all four micron categories during the 2025–26 season, with the largest gains occurring toward the end of the period. The 26-micron indicator rose from about $4.50 per kilogram clean in July to $8.00 by June, an increase of roughly 78%. The 28-micron indicator increased from around $3.20 to $6.00, while 30-micron wool rose from approximately $2.70 to $5.00. The 32-micron indicator also improved, climbing from about $2.30 to just above $4.00.

The price spread between the finer and broader crossbred categories widened over the season. The difference between 26-micron and 32-micron wool increased from a little over $2.00 per kilogram clean in July to almost $4.00 by June, indicating stronger relative demand for the finer end of the crossbred range.

The sharper rise in 26-micron wool suggests that demand was strongest for the finer end of the crossbred range. These wools can compete with broader Merino types in some applications, while 30–32 micron wool is more concentrated in heavier apparel, interiors and other coarser-wool uses. That helps explain why all crossbred categories increased, but 26 micron rose the most.

Australian Wool Exports – ABS Data 2025–26 season

Table 7. 2025–26 – July-May – Australian Wool Export Destinations

	Volume %	YOY Change	Value %	YOY Change
China	89.2%	-5.2%	87.9%	21.1%
India	5.6%	-6.0%	5.6%	20.4%
Italy	2.6%	-5.4%	4.5%	13.9%
Czechia	1.9%	-18.9%	1.3%	-20.0%

China remained overwhelmingly Australia's largest wool export market, accounting for 89.2% of export volume and 87.9% of export value. Although shipments to China fell by 5.2%, their value increased by 21.1%, implying a substantial rise in the average value of wool exported. This is consistent with the stronger wool prices recorded during the 2025–26 season.

A similar pattern occurred in India and Italy. Export volumes declined by 6.0% and 5.4% respectively, while export values increased by 20.4% to India and 13.9% to Italy. Based on these movements, the implied average export value increased by approximately 28% for India, 28% for China and 20% for Italy. This indicates that higher prices more than compensated for reduced shipment volumes across the three major markets.

Italy accounted for only 2.6% of export volume but 4.5% of export value, reflecting its tendency to purchase higher-value fine and superfine wool. India's volume and value shares were both 5.6%, suggesting its purchases were broadly in line with the average value of Australian wool exports. China's value share was slightly below its volume share, reflecting the broader range of wool types purchased by Chinese processors.

Czechia was the exception, with export volume falling by 18.9% and value declining by 20.0%. This indicates both weaker demand and a broadly unchanged to slightly lower average value per unit. The figures also highlight the continued concentration of Australian wool exports in China, leaving export earnings highly exposed to changes in Chinese processing demand and market conditions.

Thinking beyond the farm gate

How a Nuffield Scholarship changed the way Tom Hooke thinks about building a resilient Merino business.

East Loddon Merino Stud's Tom Hooke at Wanganella, NSW. His Nuffield Scholarship prompted him to look beyond genetics and consider how grazing management, feed costs and continuous improvement could build a more resilient Merino business.

Tom Hooke doesn't believe the biggest opportunities for Australian woolgrowers are always found in the paddock. Sometimes, he says, they're found thousands of kilometres from home.

As the operator of East Loddon Merino Stud at Wanganella in the western NSW Riverina, Tom knows that resilience isn't built on theory.

Running approximately 7,500 breeding ewes across 16,000 hectares alongside a self-replacing plain bodied Merino stud, every decision is shaped by rainfall, feed availability and the long-term profitability of the business.

Those realities prompted Tom to apply for a Nuffield Scholarship in 2020, taking him through South Africa, New Zealand, the United States and South America to study grazing systems, livestock production and business management.

But he wasn't looking for overseas farming systems to copy. He wanted to understand why some businesses consistently outperformed others.

"If you're the smartest person in the room, you're in the wrong room," Tom said.

"Being around people who are constantly asking questions, challenging ideas and looking for opportunities really changes how you think about your own business."

Looking back, Tom believes the scholarship changed far more than his understanding of grazing systems.

It changed the questions he asks of his own business.

Rather than focusing solely on breeding better sheep, he began looking more broadly at what makes a Merino enterprise productive, profitable and resilient over the long term.

Building a business, not just a flock

With a strong background and current presence in the merino stud industry, Tom is constantly pushing profitability via genetic gain.

However, when he stepped back and looked at the business, another factor consistently emerged.

"Our biggest variable is feed cost," he said.

"At the end of the day, that's what makes or breaks our year."

That realisation prompted a shift in thinking.

Rather than continuing to focus solely on genetics, Tom began exploring how grazing management could improve productivity while reducing reliance on purchased feed during the dry times.

One of the greatest things about constant genetic improvement is that its cumulative. It is the same when building healthier soils. Progress in one-year layers on top of the previous year's gains.

"We want to start every year with a flock of sheep, that are better than last year, grazing on a landscape that is healthier than the year before," he said.

"The cheapest feed we'll ever have is the grass we grow ourselves."

It sounds straightforward, but in low-rainfall environments where every millimetre of rain counts, maximising home-grown feed can have a profound impact on profitability.

Through his Nuffield travels, Tom studied regenerative grazing systems in South Africa, New Zealand, the United States and South America.

Rather than searching for one revolutionary idea, Tom was looking for principles that could strengthen Australian Merino businesses.

What he found was not necessarily a collection of revolutionary ideas, but rather a group of producers who were willing to think differently.

Many had challenged accepted practices within their regions and adopted grazing systems that prioritised pasture recovery, improved utilisation and greater flexibility.

"The people doing it best weren't necessarily from farming backgrounds," Tom said.

"They weren't tied to the idea that things had always been done a certain way."

That observation resonated strongly.

"It takes a bit of courage to step outside social norms and challenge accepted practices, but that's often where the opportunities are."

The rainfall reality

One of the strongest lessons from Tom's travels was just how different Australian production systems are from many overseas enterprises.

While he encountered numerous innovative businesses, he quickly realised many of their strategies were heavily dependent on reliable rainfall.

"People would have another great idea and another great investment opportunity, and I'd keep thinking, 'That's great, but what happens if it doesn't rain?'," he said.

"In Australia, rainfall risk influences almost every decision we make."

This became particularly apparent when comparing Australian systems to those operating in higher rainfall regions.

One example that still makes Tom smile occurred during a farm tour in New Zealand.

"The farmer kept referring to his property as being in a low-rainfall area," he said.

"Eventually one of the Australians asked what his annual rainfall was."

The answer was approximately 650 millimetres.

"There were about 50 Australians standing there laughing."

It was a humorous moment, but it reinforced an important lesson.

For Australian sheep producers operating in lower rainfall environments, the story highlights an important reality: overseas solutions cannot simply be copied and pasted.

They must be adapted.

That is one reason Tom believes grazing management offers such significant potential.

Unlike fertiliser applications, pasture renovation programs or infrastructure-heavy investments, improving grazing management can often be achieved using existing resources.

"In our low rainfall environment, changing how we graze is one of the biggest, and perhaps the only, real tool we've got available," said Tom.

The power of continuous improvement

When asked what separates businesses that thrive from those that merely survive, Tom's answer is surprisingly nuanced.

He does not believe successful operators constantly chase every new idea.

Nor does he believe they become locked into doing things the way they have always been done.

Instead, they strike a balance.

"They pick a direction and become exceptionally good at it," he said.

"They're constantly adapting, but they're not constantly changing course."

Across the businesses he visited during his Nuffield travels, Tom observed a common theme.

Some were entrepreneurs creating entirely new opportunities.

Others simply farmed exceptionally well.

What united them wasn't the enterprise itself, but a relentless commitment to improvement.

"They weren't getting comfortable."

That mindset continues to influence decisions within the East Loddon business today.

Whether considering genetics, grazing systems, animal welfare or market opportunities, Tom believes complacency is one of the greatest risks facing any enterprise.

"Challenge everything," he said.

Succession with purpose

Away from grazing and genetics, Tom's story also offers a refreshing perspective on succession planning.

In 2025, Tom and his brother formally separated the family partnership, each taking responsibility for their own businesses while maintaining strong family relationships.

The transition occurred significantly

THE YARN EPISODE 288
Tom Hooke Nuffield:
Regen Farming in Pastoral Areas
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Tom Hooke believes building a resilient Merino business means continually questioning accepted practices while keeping a firm focus on the fundamentals that drive long-term profitability.

earlier than many succession plans seen across Australian agriculture.

"Why wait until we're in our fifties?" Tom said.

The process allowed both brothers to pursue their own goals while providing financial certainty for their parents.

Unexpectedly, the timing proved particularly valuable when Tom's father faced significant health challenges shortly after the transition.

"It actually worked out well from that perspective," he said.

"A lot of the responsibility and stress associated with running the farm had already been removed."

Importantly, the transition did not mean disengagement.

> "It takes a bit of courage to step outside social norms and challenge accepted practices, but that's often where the opportunities are."
>
> TOM HOOKE, WANGANELLA, NSW

Tom's parents remain actively involved in the business and continue to contribute where they can.

For Tom, it demonstrates that succession is not simply a financial transaction. It is about creating opportunities for the next generation while ensuring the previous generation remains connected and valued.

Building for the long term

Perhaps the strongest theme running throughout Tom's story is a commitment to long-term thinking.

Whether discussing grazing management, genetics, succession or animal welfare, decisions are consistently viewed through the same lens.

Will this business still be competitive in 40 years? That question has shaped many of the decisions made at East Loddon Merinos. It influenced the move towards non-mulesed production.

It influences breeding decisions. And it continues to guide investment priorities.

"We plan on being in this business for a long time," Tom said.

"If I didn't think there was a future in Merinos, I wouldn't be doing it."

Tom remains optimistic about the future of wool despite recent market volatility.

Growing consumer awareness around sustainability, traceability and natural fibres provides significant opportunities for wool's story to resonate with future generations.

"Wool is such a good product," he said.

"It's got such a good story behind it."

At the same time, he acknowledges the importance of maintaining industry credibility and staying ahead of consumer expectations, particularly around animal welfare.

As markets evolve, Tom believes producers must continue adapting while remaining focussed on the fundamentals that underpin successful businesses.

For Tom, building a resilient Merino business isn't about chasing every new idea.

It's about remaining curious enough to recognise the right one when it comes along.

Because sometimes the biggest opportunities aren't found by working harder.

They're found by thinking differently.

The MLP Story

After 10 years, five research sites, more than 5,700 Merino ewes and more than two million validated records, the Merino Lifetime Productivity Project has created an unprecedented picture of lifetime performance in the Australian Merino.

Following a national series of MLP Results Seminars, *Beyond the Bale* looks at what the project has delivered, what it has confirmed, what it has challenged and what comes next.

Ten years of lifetime data

After ten years of research, the Merino Lifetime Productivity (MLP) Project has delivered more than two million validated records from more than 5,700 Merino F1 ewes, creating a major lifetime productivity dataset for the Australian Merino industry.

The project set out to improve lifetime productivity and profitability, strengthen genetic evaluation and benchmarking, improve the timing of assessment decisions, evaluate selection approaches and indexes, assess reproductive performance and its impacts, and support the future competitiveness of the Merino.

Led by Australian Wool Innovation (AWI) in partnership with the Australian Merino Sire Evaluation Association (AMSEA), along with site hosts and industry partners, the 10-year, $13 million project followed more than 5,700 Merino F1 ewes across five diverse environments.

Foundation ewes were joined to 134 industry sires representing a broad range of merino types and breeding philosophies, with the resulting ewe progeny assessed throughout their working lives. Across the project, 22,740 joinings were recorded and more than two million validated records collected.

The project generated lifetime information across wool, reproduction, growth and carcase, health and welfare, visual traits, classing and genomics. Almost all ewes were retained regardless of performance, enabling researchers to examine how early assessments related to adult and lifetime performance without the effect of performance culling.

While data collection was completed in August 2024, the work of translating that data into industry outcomes continues.

Over recent months, MLP Results Seminars have been rolled out across Australia, presenting the major findings to woolgrowers, ram breeders, classers, advisors and researchers. The seminar program has focused on the timing and value of assessments, lifetime trait relationships, classing and measured performance, project profit drivers, genomics and the incorporation of MLP findings into MERINOSELECT.

MLP
Merino Lifetime Productivity Project

AUSTRALIAN MERINO SIRE EVALUATION ASSOCIATION
MERINO
Superior Sires

"Adoption of the MLP outcomes will lift gains in lifetime profitability and the rate of genetic gain through improvements in the genetic evaluation technology to date and near future, increase in hogget and adult fleece assessments and their use in animal selection and better combining visual and measured assessments by both ram breeders and buyers."

GEOFFREY LINDON,
AWI PROGRAM MANAGER,
SHEEP GENETICS & ANIMAL
WELFARE ADVOCACY

Why was MLP needed?

The industry's previous major Merino R&D flocks dated from the 1990s. Since then, Merino types and the tools used to select them have changed considerably.

The industry now includes plainer and non-mulesed types, faster maturing and lower fibre diameter sheep, alongside MERINOSELECT ASBVs, new traits and indexes and genomics. At the same time, there is increasing chemical resistance to internal and external parasites and the lamb industry and sheep and lamb values have increased the economic value of reproduction.

Over many decades merino selection decisions have also been occurring progressively at younger and younger ages.

There are financial incentives to class and sell cull rams and ewes before they cut adult teeth, while joining ram and ewe lambs has become more common. In some systems, animals are therefore being selected at or soon after weaning.

This created several questions for MLP: how well does performance measured early in life predict adult and lifetime performance; are later-maturing sheep disadvantaged by early assessment; what is the value of yearling, hogget and adult assessments; and how should visual classing, objective measurement, ASBVs and indexes be combined?

The project also examined relationships and trade-offs between wool production, fibre diameter, reproduction, growth, carcase, welfare and visual traits, with the aim of providing evidence for balanced breeding objectives rather than selection for relatively few traits in isolation.

> "The biggest questions were "Did the new genomic technology mean adult fleece weight could be predicted accurately at weaning or even after one shearing or is a hogget early adult shearing still required", "How many reproduction assessments were needed", and "how well did the MERINOSELECT wool indexes predict lifetime performance."

How MLP was designed

MLP was designed to generate lifetime genetic and economic data from animals across different environments and Merino types.

Five sire evaluation sites were established across environmentally and genetically diverse locations: Pingelly in Western Australia; Balmoral in Victoria; and MerinoLink, Macquarie and New England in New South Wales.

The sites represented different ewe bases and Merino types, ranging from an ultrafine 16-micron New England flock through to a 20-micron Macquarie ewe base incorporating two divergent skin types.

Across the sites, annual measurements included greasy and clean fleece weight, fibre diameter, staple length and strength, body weight, fat and eye muscle depth, reproduction, worm egg count, condition score and a broad range of visual wool, conformation and welfare traits. Sheep were also professionally classed and genomic information was collected.

Almost all ewes were retained for life, with no performance culling and removal only for welfare reasons. This allowed the project to test early selection decisions, quantify re-ranking between age stages and estimate relationships between young-age, adult and lifetime performance.

The genetic analysis also accounted for non-genetic effects including contemporary group, birth and rear type, age, dam age and adult reproductive status, helping separate observed performance from estimates of genetic merit.

> "All daughters of the AI sires were retained for life as we wanted to know how all the grades at every classing performed throughout their lifetime. This gave us results to show when classing was most strongly aligned with lifetime performance and at what age the assessment of each trait is most heritable to maximise genetic gain."

What did the data show?

The MLP analysis has produced specific findings on when traits are most heritable, how well young-age measurements predict adult and or lifetime performance, how much genetic re-ranking occurs between ages, the effect of birth and rear type on lifetime performance, the value of repeated fleece and reproduction records, and how visual and measured assessments can be combined.

It has also added lifetime data to the Merino Genomic Reference Population, informed MERINOSELECT updates and provided independent validation of selection indexes and ASBVs.

Continued on next page →

MLP by the numbers

- **10 years** of research
- **$13 million** collaborative investment by AWI, sire entrants and host partners
- **5** research sites
- **134** diverse industry AI sires
- **More than 5,700** Merino F1 ewes assessed for life
- **22,740** joinings
- **More than 2 million** validated records
- **31** scientific papers published as at June 2025
- **23** field days and MLP presentations attended by 2,155 people
- **31** site reports downloaded more than 11,000 times
- **MLP Project breeding values released July 2025**

What MLP confirmed

One of the clearest outcomes from MLP is that there is no single assessment method, age or trait that defines lifetime productivity. The project instead reinforced the value of a clear breeding objective and using the assessment methods that are best suited to the traits within that objective.

The genetic analysis found that many core production traits are heritable and can respond to selection. Clean and greasy fleece weight were moderately to very highly heritable depending on age, fibre diameter was very highly heritable from yearling age onwards, and body weight was highly to very highly heritable across life stages. By contrast, weaning rate had very low heritability, reinforcing the greater influence of environment and management on reproductive performance and the need for repeated records and genetic evaluation to optimise progress in low-heritability traits.

The project also confirmed that visual classing remains an effective selection tool for traits that can be readily observed. Genetic and observational analyses showed classing was a useful genetic proxy for clean fleece weight, staple length and body weight, while also allowing simultaneous selection for commercially important characteristics not fully represented in indexes or ASBVs, including conformation, feet and legs, and wool quality. Its limitations were equally clear. Measurements are needed to monitor genetic trends over time and classing was less effective for traits that are difficult to assess visually, including fat and eye muscle depth, worm egg count and weaning rate, and for traits involved in antagonistic relationships with clean fleece weight. For these traits, MLP supports combining visual assessment with measurements, raw data and breeding values rather than viewing classing and selection with measurement as competing approaches.

"While one year old measured assessments have value, hogget or early adult assessments better reflect how the animals will perform over their lifetime. These older age measured and visual assessments for wool and reproduction better align, which lead to greater confidence and better selection decisions occur in improving lifetime performance and genetic gain. This is particularly the case when there are important non visual and antagonistic traits in the breeding objective."

What MLP challenged – how early is too early?

The timing of selection was one of the major questions MLP was designed to investigate, and the results provide an important qualification to the industry's long-term move towards younger assessment.

Post-weaning and yearling assessments provide useful information, but for several traits they were less heritable and less predictive of lifetime performance than measurements taken at hogget or early adult ages.

For wool traits, the relationship strengthened markedly for both lifetime performance and genetic gain as animals matured. Post-weaning clean fleece weight had only a moderate genetic relationship with adult performance, while hogget clean fleece weight had a very high relationship with later adult performance. Fibre diameter was more consistent across ages, with high correlations from young ages and very high correlations from hogget age onwards. Heritability was also higher at the older ages which leads to higher rates of genetic gain.

The results do not suggest that early assessment has no value. Early classing at post-weaning or yearling age reliably identified low-performing animals, and young-age measurements remain useful for early selection. However, MLP found that hogget assessment – particularly at 18–22 months with around 10–12 months of wool – provided a stronger basis for identifying animals likely to perform at a high level over their lifetime and how their progeny would perform.

This was also evident in the economic analysis. Hogget-age fleece assessments improved the identification of high profit-per-hectare sires, while high-profit sires could not be predicted as well from post-weaning or yearling fleece assessments alone. Both early- and late-maturing sire groups moved up and down in fleece-weight ranking between yearling and adult ages.

The implication is not to abandon young-age selection, but to recognise the value from additional information available from a second assessment. MLP supports greater use of hogget and early adult fleece information, particularly in ram breeding programs, and recommends that hogget and/or adult fleece weight ASBVs and their accuracies be made more visible in ram and semen sale information alongside yearling results. (For flock rams, adult data is predicted from older relatives and genomics and when their sisters are assessed later in life.

Age of assessment

Post-weaning and yearling: useful early information and effective for identifying lower-performing animals and early progeny testing of sires.
Hogget: stronger genetic relationships with adult and lifetime performance for a number of traits; the MLP classing work identified hogget age as the most effective stage for selecting higher lifetime performance and genetic gain.
Adult: repeat records remain important for traits such as reproduction and where performance or rankings can change across adult ages.
MLP recommendation: use early information, but where lifetime fleece performance is important, retain hogget or early adult assessment as part of a two-stage selection approach.

Updating flock rams ASBVs is important, don't rely on their early in life ASBVs when reclassing them at older ages.)

> "MLP has shown that while genomics has made early in life ASBVs more stable and robust, genomics has not replaced the need for hogget or early adult wool and reproduction assessments. Early and late maturing animals can re-rank early in life and hogget and early adult assessments are needed for both. Update ASBVs of current animals prior to annual classing."

Early-life effects matter – but they are not genetics

MLP also quantified the lasting effect that birth and rear type can have on observed performance.

Ewes born and reared as multiples were lighter and produced less clean fleece weight through life than ewes born and reared as singles, with the largest differences occurring at younger ages and decline through adult life. Multiple-born and reared ewes also had broader fibre diameter and lower fat and muscle measurements at yearling and hogget ages.

Importantly, these differences were environmental rather than evidence of lower genetic merit and do not flow through to their progeny. Birth and rear type had a highly significant effect on fleece weight and body weight across all assessed ages, meaning unadjusted comparisons could systematically favour single-born and single-reared animals.

The reproduction pattern was different. Singles held an early advantage as maidens, consistent with their greater size and condition, but multiples caught up later in life and recorded higher reproduction at later ages in the MLP analysis.

For selection, the message is straightforward: birth and rear type and dam age need to be accurately recorded and accounted for when predicting genetic merit. MERINOSELECT ASBVs already adjust for these effects, while classers and breeders using raw performance information need access this information to make improved assessments of lifetime performance and genetic merit.

Reproduction requires lifetime information

Lifetime reproduction was a key merino R&D data gap and a core component of MLP Its contribution to enterprise profitability in many regions has increased in recent decades but remains difficult to select for directly.

The genetic analysis reinforced why. Weaning rate had very low heritability – approximately 0.02 to 0.04 across the adult age stages assessed – and genetic ranking showed more movement between younger and later adult reproduction records than was observed for traits such as fleece weight and fibre diameter.

Repeated reproductive records therefore add information that cannot be captured reliably from a single joining. MLP has contributed large, well-recorded reproduction datasets to Sheep Genetics and supported the development and refinement of new reproduction breeding values including conception, litter size, ewe rearing ability and weaning rate.

The classing work also identified an important interaction. Across most sites, ewes with higher lifetime reproduction tended to be classed down later

Continued on next page →

in life, reflecting the physical impact of reproduction on the ewe at the time of assessment. Providing reproductive history when mature stud ewes are classed can therefore help distinguish reproductive effects from underlying genetic merit.

While the heritability for Weaning Rate was very low there was a large variation between sires that ram breeders can utilise.

Profit was driven by more than one trait

The MLP economic analysis found substantial genetic variation in flock profitability, but no single trait or breeding philosophy was dominant in the highest-profit animals.

Current MERINOSELECT wool indexes aligned well with the MLP profit-per-hectare analysis, providing independent support for the way the indexes combine economically important and welfare traits. Across the analysis, fleece value and reproduction emerged as key profit-per-hectare drivers.

There was also large genetic variation in lifetime fleece value, while ewe survival from yearling age through life had a profit impact similar to staple strength. The analysis highlighted the trade-offs with welfare and other traits that are difficult to place an economic value on because current market signals are limited for some traits and or the value of a trait can vary enormously across different wool growing regions (i.e. worms, dags, flystrike).

Importantly, high-profit sires occurred across most of the breeding philosophies and production systems represented in MLP. The finding supports the project's broader conclusion that there is no single Merino type of breeding philosophy maximises profitability in every environment or enterprise. The breeding objective, production system and how effectively selection is implemented remain central.

Findings from the MLP data

1. **Hogget information adds value.** Young-age assessments are useful, but hogget and early adult assessments improve prediction of lifetime fleece performance, profit and genetic gain.
2. **Classing and measurement are complementary.** Classing performs strongly for visible traits; measurements and breeding values add information for both visual and non-visual traits and for breeding objectives with a number of antagonistic traits (genetic trade-offs).
3. **Birth and rear type affect observed performance.** Singles and multiples should not be compared without appropriate adjustment or allowances.
4. **Reproduction needs repeat adult records.** At least 2 adult assessments are needed with pedigree and genomics information, to reach reasonable accuracies for Weaning Rate.
5. **There was no single high-profit Merino type.** High-profit sires were represented across different breeding philosophies, with fleece value and reproduction key drivers of profit per hectare.

> "In some wool growing regions a few traits are key to sustainability and profit, in other regions a much broader range of traits are required. This creates a range of merino types that are best suited to specific environments and allows for a range of breeding philosophies to achieve the "right" merino. The key is how well each breeding objective is put into practice to optimise lifetime performance and genetic gain."

L–R Ben Swain (Australian Merino Sire Evaluation Association (AMSEA)), Tracie Bird-Gardiner (NSW DPIRD), Matthew Coddington (Macquarie Sire Evaluation Association), Rich Keniry (MerinoLink), Peta Bradley (MLA Sheep Genetics), Anne Ramsay (Stenhouse Consulting), Daniel Brown (Animal Genetics and Breeding Unit (AGBU)), Peter Wahinya (AGBU) and Geoff Lindon (AWI).

What MLP added

Beyond the individual findings, MLP has already provided data to Australia's national genetic evaluation system.

Lifetime phenotypes and genotypes from the project have been added to the Merino Genomic Reference Population. MLP data contributed to MERINOSELECT analysis, trait and index developments in 2022 and 2024 and will contribute to further major updates planned for 2027–28.

The project has also contributed data to the development of new reproduction breeding values and to genomic-only tools designed to provide new genetic benchmarking tools to breeders outside of the ASBVs system. Genomics has increased the accuracy of breeding values, including weaning rate, and the addition of lifetime records is helping improve the stability of early in life ASBV predictions. However, one of MLP's important findings is that genomics has not yet removed the value of hogget and early adult fleece assessment or the need for at least 2 reproduction assessments.

That distinction is important. The project has not produced a replacement for classing, measurement or producer judgement. It has provided considerably more evidence about where each source of information is strongest, where its limitations lie and how they can be combined more effectively.

MORE INFORMATION
wool.com/mlp
Click on MLP Final Reports to access the MLP project report, the Economic Analysis of MLP data and MLP Classer Reports

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AUSTRALIAN MADE

TROY

Why Jim Gall believes wool's best days are still ahead

From paddock to product, the RB Sellars CEO sees growing opportunities for Australian wool, stronger connections with consumers and a future built on natural fibres.

"No one's sold any wool until somebody buys a sweater."

It is a simple observation, but one that has stayed with RB Sellars CEO and woolgrower Jim Gall throughout his career.

This quote speaks to a reality that can sometimes be overlooked at farm level.

Wool's journey does not end when the bale leaves the farm gate. Its ultimate success depends on consumers choosing wool products over competing fibres.

For Gall, that connection between grower and consumer is one of the most important conversations facing the Australian wool industry today.

A fifth-generation woolgrower from north-east Victoria, Gall occupies a unique position within the supply chain. He understands the challenges of producing wool, but also spends his days working with brands, retailers and consumers.

That perspective leaves him optimistic about the industry's future. In fact, he believes Australian wool is entering one of its most exciting periods in decades.

"Stay passionate," Gall said.

"Forget about the gold rush – this is going to be the wool rush."

Reconnecting growers and consumers

Gall believes woolgrowers have, for too long, been disconnected from the people ultimately purchasing wool products.

While enormous progress has been made in production efficiency, genetics and quality, he believes there is still significant opportunity to better understand what consumers want and how they view wool.

"I think growers have, for too long, been removed from the consumer," he said.

"The sheep-to-shop experience is important because it helps farmers understand what consumers value and what they expect from the products they buy."

Today's consumers are asking different questions than previous generations. They want to know where products come from, how they are made and whether they align with their personal values. Traceability, provenance, sustainability and authenticity are increasingly influencing purchasing decisions.

"I think consumers today want to know not just that they're getting a good product and a quality product at the right price point, but that it comes from a place with integrity and authenticity," Gall said.

Australians are becoming more interested in where their food comes from and, increasingly, where their fibre comes from.

For wool, Gall sees an opportunity to strengthen those connections and tell the stories behind the fibre.

That means showcasing the farming families, regional communities and production systems responsible for growing some of the world's finest wool.

"Ninety-eight per cent of all farms in Australia are farming families," he said.

"They're not corporate. They're mums and dads and kids and grandparents."

Wool beyond the jumper

One of the greatest challenges facing wool is overcoming outdated perceptions.

For many consumers, wool is still associated with heavy knitwear, itchy jumpers or formal suiting.

Gall believes those perceptions no longer reflect the reality of modern wool products.

"I think a lot of consumers see wool and have seen wool in the past as being knitwear and jumpers," he said.

"That market is important and needs to continue but seeing how wool can be used in different ways really demonstrates its versatility."

This thinking sits at the heart of RB Sellars' recent partnership with Woolmark and the development of a Merino performance wear range designed specifically for Australian conditions.

The concept emerged after the company successfully transitioned its cotton products to traceable Australian cotton and began examining how wool could be applied in practical, everyday workwear.

Rather than focusing solely on traditional wool garments, Gall looked to the hiking, adventure and sportswear sectors for inspiration.

Base layers, in particular, stood out.

"We wanted to look at how we could make Merino wool relevant and durable for Australian work conditions," he said.

"Farmers are spending less time in the paddock, more time in tractors and more time in machinery, and they want to be able to move comfortably between those environments."

The result is a growing category that positions wool not simply as a fibre, but as a performance material.

Farmers are athletes

One of Gall's most compelling observations is his view that farmers have traditionally missed out on the sort of innovation seen in sports and activewear.

While elite athletes benefit from continual improvements in performance clothing, many agricultural workers still rely on relatively unchanged workwear.

For Gall, that presents an opportunity.

"I've been crutching this week and four runs in a day is pretty exhausting," he said.

"Farmers are athletes. People forget this."

Once viewed through that lens, the role of clothing changes.

The focus shifts towards comfort, breathability, durability, temperature regulation and productivity.

"Developing products that support that productivity is a really important concept for us," Gall said.

Importantly, he sees workwear as just one of many emerging opportunities for wool.

Sportswear and outdoor apparel have already demonstrated wool's performance credentials. Workwear could represent the next major category.

"I think workwear is a huge opportunity for wool," he said.

"There has been a lot of innovation in design and fabrics, but very little innovation around fibre."

For an industry seeking new demand channels, that presents exciting possibilities.

Nothing beats nature

Gall's optimism extends well beyond workwear. In attendance at the Natural Fibres Forum, he observed strong interest from global brands looking to better understand wool and cotton.

The event brought together brands, manufacturers and industry leaders at a time when businesses are reassessing their supply chains and material choices.

According to Gall, the conversation increasingly centres on natural fibres.

"This global shock has created a recalibration for businesses about where they source their products from and what they should be backing in the future," he said.

"Should we be backing synthetics? Should we be backing natural fibres like cotton and wool?" His view is clear.

"Nothing beats nature."

Consumers are becoming more aware of biodegradability, waste, longevity and product performance.

Natural fibres offer compelling advantages across each of these areas.

"When people understand how products degrade over time and the benefits of natural fibres, they see the value," Gall said.

"The feeling of having wool and cotton close to your skin is nothing better."

For woolgrowers, these trends represent far more than a sustainability discussion.

They represent future demand.

> "Farmers are athletes. People forget this. Their output is enormous."
>
> JIM GALL, RB SELLARS CEO

Confidence returns to wool

Perhaps the most encouraging part of Gall's outlook relates to confidence.

After several difficult years, he believes positivity is returning across the wool sector.

Importantly, he sees that confidence reflected not in sentiment, but in investment.

"The best indication of confidence is when people start investing in infrastructure," he said.

Across regional Australia he is seeing producers invest in yards, shearing sheds and productivity improvements.

These investments are only possible when businesses believe in the future.

"You can only do that when you're in the black and you've got capital to invest," he said.

Higher wool prices are also encouraging renewed optimism. While rising prices increase input costs for brands, Gall views that as a positive signal.

"Most brands would probably say that's a bad thing. We think it's a good thing," he said.

"It's showing us that, at the farm gate, this is going to be a sustainable industry."

A sustainable farm sector creates benefits throughout the supply chain.

It supports investment, quality, consistency and long-term product development.

For brands such as RB Sellars, that stability is essential.

"We're going to have better quality wool, a more consistent supply of wool and more factories engaged in understanding wool better because they're going to be making more products from wool than they've ever made before."

A uniquely Australian advantage

Gall remains convinced that Australia holds a remarkable position within the global wool industry. While other producing nations contribute important volumes, Australia's reputation for quality and efficiency remains unmatched.

"There are only a few things Australians are extraordinary at," he said.

"But one thing we're exceptionally good at is producing wool."

Australian growers continue to produce some of the world's most sought-after fibre under highly efficient production systems.

Combined with growing global interest in natural fibres, Gall believes that creates a significant competitive advantage.

Factories are increasingly sourcing wool directly from the market.

Brands are looking for natural fibre solutions. Consumers are becoming more aware of product origin and performance. Taken together, those signals point towards opportunity.

"I think the market dynamics are in our favour," Gall said.

"The immediate future is bright, the medium-term future is brighter, and the long-term future is secured for wool."

For an industry that has weathered significant challenges, it is a message worth hearing. And perhaps Gall's final observation is the one growers should remember most.

"Be progressive, be passionate about wool," he said.

"Because our best times are yet to come."

MORE INFORMATION
rbsellars.com.au

The industry's quiet champion

From championing Merino wool and mentoring future leaders to investing in training and innovation, Michael Wright has become one of the Australian wool industry's most respected advocates.

Spend an hour in conversation with Michael Wright, General Manager of Rhodes Pastoral, and it quickly becomes apparent the discussion isn't really about the business at all.

Based across approximately 17,500 hectares in the Boyup Brook, Arthur River and Kojonup districts of Western Australia's south-west, Rhodes Pastoral is one of the state's leading mixed farming enterprises, running around 23,000 Merino ewes alongside cropping, cattle and a White Suffolk stud.

Yet despite the scale of the operation, Michael's attention rarely stays on Rhodes Pastoral for long.

Instead, the conversation inevitably returns to the same subject.

The future of Australian wool.

It is a conversation he has been having for much of his career.

Whether mentoring young producers, investing in leadership, embracing new technology or simply speaking positively about Merino wool whenever the opportunity arises, Michael has quietly become one of the industry's strongest advocates.

"I think wool's got a great future," he said simply.

> "We've got a great story. The industry just needs to tell it better."
>
> MICHAEL WRIGHT, RHODES PASTORAL, WA

It isn't a throwaway comment. It is a philosophy that underpins everything he does.

After decades in agriculture, Michael has experienced fluctuating markets, difficult seasons and an industry that has continually evolved. Yet rather than dwelling on the challenges, he speaks with genuine optimism about the opportunities ahead.

"The younger generation is figuring out they want clothing that's more sustainable," he said.

"I think they're realising how good wool is."

That optimism is grounded in experience, backed by commercial success and reinforced by a lifelong commitment to strengthening the Merino industry.

It is also what has made Michael one of wool's quiet champions – not through grand statements or high-profile roles, but through practical leadership, generous advocacy and an unwavering belief that Australian wool has one of the best stories in agriculture.

A voice for wool

Michael's advocacy for the wool industry comes from a genuine belief that every woolgrower has a responsibility to help shape the industry's future.

Top: Rhodes Pastoral General Manager Michael Wright has spent much of his career championing Merino wool, mentoring future leaders and encouraging the industry to tell its story with confidence.

Throughout the conversation, he repeatedly shifted the focus away from his own achievements and back towards the opportunities facing Australian wool.

Rather than dwelling on challenges, he speaks about solutions.

Rather than waiting for change, he encourages producers to become part of it.

For Michael, advocacy is about far more than identifying problems.

It is about rolling up your sleeves.

That philosophy has seen him invest countless hours into industry leadership, community service and professional development throughout his career.

Alongside managing one of Western Australia's most progressive mixed farming enterprises, Michael has completed the CEO Institute leadership program, participated in the Australian Rural Leadership pathway, contributed to industry committees, served on local council and continues mentoring the next generation of agricultural leaders.

Each experience has reinforced one belief. Leadership is about bringing people together.

"Constructive criticism is important," he said.

"But you've also got to be prepared to get involved."

It is a simple philosophy, but one that has shaped the way Michael approaches almost every aspect of his career.

Putting production into perspective

One of the most memorable moments of the conversation came when Michael stopped talking about sheep altogether. Instead, he started talking about numbers. Numbers that anyone and everyone could understand. Rhodes Pastoral currently manages around 23,000 Merino ewes, alongside a White Suffolk stud, approximately 750 Angus breeders and 5,000 hectares of cropping.

The business produces around **$7,000 worth of wool every day** at current market prices.

Curious about the broader contribution of the enterprise, Michael recently entered the farm's production figures into an artificial intelligence program.

The result surprised even him.

"It came back and said we produce enough food and fibre to feed between **55,000 and 60,000 people**."

For Michael, those figures aren't about celebrating the size of the business. They're about changing the conversation around agriculture.

"We're feeding people," he said.

"But we are not that great at marketing ourselves."

It is a sentiment that surfaced repeatedly throughout the interview.

Australian farmers, he believes, are incredibly good at producing food and fibre.

They are far less comfortable telling people about it.

"The only time we're in the media is when there's bad news," he said.

Michael believes the industry often talks in language that resonates with other producers but means very little to consumers.

Instead, he believes agriculture needs to become better at translating its impact into stories that connect with the broader community. He points to one recent example.

A single B-double load carrying 650 Merino lambs left Rhodes Pastoral earlier this year, averaging $265 a head – more than $170,000 worth of livestock on one truck.

Likewise, every semi-trailer carrying wool away from the property represents years of breeding decisions, pasture management, animal husbandry and seasonal risk.

"When that wool leaves the farm that's a piece of your property going with it," he said.

It is a simple observation. Yet it perfectly captures the way Michael views agriculture.

Every bale of wool tells a story. Every truckload of sheep represents years of investment.

Every fleece carries with it the work of the people and landscapes that produced it.

By the numbers: Rhodes Pastoral

- **17,500** hectares across Boyup Brook, Arthur River and Kojonup, WA
- **23,000** Merino ewes
- **750** Angus breeders
- **5,000** hectares of cropping
- Produces around **$7,000** worth of wool every day
- Produces enough food and fibre to support an estimated **55,000–60,000** people
- Held approximately **3,000** bales of wool during the market downturn as part of a long-term marketing strategy

For Michael, these are the stories Australian agriculture needs to tell more often. Not because producers are looking for recognition.

But because consumers increasingly want to understand where their food and clothing come from.

And no industry is better placed to tell that story than Australian wool.

Telling the Merino story better

If there was one message Michael returned to more than any other during the interview, it was this:

The wool industry has a great story. The industry just needs to tell it better.

When he first entered agriculture more than four decades ago, there was a far stronger connection between rural and urban Australia. Today, he believes that relationship has changed dramatically.

"When that wool leaves the farm, that's a piece of your property going with it."

MICHAEL WRIGHT, RHODES PASTORAL, WA

"When I started farming, there was a connection between the city and the bush," he said.

"Now that disconnect has really grown."

For Michael, rebuilding that connection represents one of the industry's greatest opportunities. Not by asking consumers to simply buy wool. But by helping them understand why wool matters. Natural. Renewable. Biodegradable. Ethically produced. Continually improving.

"We produce ethically grown, sustainable Merinos," he said.

"And we're always trying to improve."

Keeping Merinos relevant

One of Michael's more memorable observations during the interview came with a smile.

"We've just got to make sheep sexy again."

It was a light-hearted comment, but behind it sat a serious message. What Michael was really talking about was relevance. He believes today's Merino industry already has everything consumers and young producers are looking for – innovation, technology, sustainability and continual improvement. The challenge is making sure people know it.

Today's sheep enterprises are built on genomics, electronic identification, performance recording and data-driven decision making.

"Technology is getting very savvy now," he said.

"We've got to change with the times."

At Rhodes Pastoral, that commitment to continual improvement drives every decision, from genetics and pasture management through to animal welfare.

For Michael, those advances are part of a much bigger story. Australian woolgrowers are producing a natural, renewable fibre while continually improving the way it is grown.

"We're always trying to improve," he said.

"It's genetics, it's feeding, it's welfare. Everything is connected."

Backing wool with confidence

Michael's confidence in wool is grounded in commercial reality. Like many growers, Rhodes Pastoral weathered the market downturn by holding around 3,000 bales of wool for almost three years – a calculated decision that reflected a long-term view of the industry.

"It was a risk," he said.

"But every business is different."

That optimism extends well beyond the farm gate.

As consumers increasingly seek natural and sustainable products, Michael believes wool is perfectly placed to meet that demand. Rather than seeing synthetic fibres purely as competition, he sees an opportunity.

Every garment that incorporates wool, even in a blend, introduces consumers to the fibre's natural performance and sustainability credentials.

He also believes Australian wool has much to gain by aligning more closely with the country's internationally recognised red meat industries.

"We need to get on the coattails of the meat side," he said.

"Look at the Merino. Look what it produces."

For Michael, the Merino ewe remains one of agriculture's great production animals – producing both premium wool and high-quality lamb while underpinning profitable, resilient farming businesses.

One of the industry's quiet champions

For all the discussion about Rhodes Pastoral, Michael's attention rarely stayed on his own business for long.

Every conversation eventually returned to the same place. The future of Australian Merino wool.

Whether through mentoring young producers, investing in leadership, supporting industry training or simply speaking positively about wool whenever the opportunity arises, Michael has spent much of his career advocating for an industry he believes in.

Not because anyone asked him to.

But because he believes every producer has a role to play in shaping its future.

"We've got a great story," he said.

Spend an hour with Michael Wright and it's hard not to believe him.

His optimism is genuine, his advocacy unwavering and his belief in Australian wool unmistakable.

In many ways, Michael represents the kind of leadership the Merino industry has always relied upon – quiet, practical and deeply committed to leaving the industry stronger than he found it.

Sheep Sustainability Framework

The next Sheep Sustainability Framework Annual Report will be released in November 2026. For woolgrowers, it is not another on-farm assurance program or a new set of requirements. It is an industry report: a way of bringing together data on the issues that customers, regulators, investors and the sheep industry are already asking about.

The Sheep Sustainability Framework, or SSF, reports on the Australian sheepmeat and wool industries. It is led by Sheep Producers Australia and WoolProducers Australia, with funding, project management and secretariat support from Australian Wool Innovation and Meat & Livestock Australia.

The Framework tracks areas including animal welfare, animal health, environment, climate, people, profitability, productivity and market access. Its job is to show where the industry has data, where performance is changing and where more work is required.

That matters because the questions being asked of Australian wool are changing. Brands and retailers are increasingly expected to substantiate environmental and animal-welfare claims. Banks and insurers are paying closer attention to climate and business risk. Governments are looking for better information on traceability, biosecurity and sustainability.

The SSF gives the industry a common reference point for those conversations.

What will be in the November report?

The 2026 report will update the industry picture across a wide range of measures. Some of the areas most relevant to woolgrowers are outlined below.

Mulesing, flystrike and pain management

Mulesing remains a significant issue for many wool customers. The Framework reports industry-level data on mulesing and the use of appropriate pain management, as well as information from the National Wool Declaration.

The report also recognises that growers need workable flystrike-management options. It covers the role of genetics, including selection for lower breech wrinkle and other flystrike-resistance traits, alongside pain management and improved husbandry.

The point is not to prescribe a single approach for all woolgrowers. Flystrike risk varies between regions and production systems. The value of the Framework is that it gives the industry a more consistent way to explain the practices, research and progress behind those decisions.

Traceability and biosecurity

The report will also cover the continued rollout of electronic identification for sheep and goats. At an industry level, it strengthens traceability, disease response and market access.

The SSF also reports on biosecurity preparedness. This includes the industry's work to reduce the risk and impact of an emergency animal disease, which is important for both flock health and continued access to export markets.

Environment and climate

The Framework reports on issues such as ground cover, vegetation, biodiversity, soil health, water, chemical use and greenhouse-gas emissions.

Not every grower will measure all of these on their own farm, nor is that the purpose of the report. The SSF is designed to show industry-level trends and identify where better information is needed.

One practical example is the SSF Ground Cover Dashboard. It uses satellite data to track ground cover and woody vegetation at a regional level. This gives the industry a better picture of land condition and seasonal change across sheep-producing areas.

The report also tracks the uptake of renewable energy and carbon-accounting tools, while recognising that emissions and production outcomes are influenced by season, flock numbers and farm productivity.

Profitability and market access

Sustainability reporting only has value if it supports viable sheep businesses.

The Framework therefore includes measures on profitability, productivity, research and development investment, export access and the value of sheepmeat and wool production. It also reports on the trade arrangements that support Australian wool's access to global markets.

For growers, this is an important reminder that sustainability and profitability are linked. Better animal health, sound biosecurity, productive pastures, good genetics and access to markets all affect the long-term strength of a wool business.

What happens next?

The SSF's current strategic plan focuses on three areas: stakeholder engagement; data collection and reporting; and responsiveness to industry needs.

Over the next year, that means improving the data available to the industry, continuing discussion with growers and supply-chain participants, and considering where the Framework should expand.

The November report will not have every answer. Its purpose is to provide a clearer picture of where the industry is now, and where attention is needed next.

MORE INFORMATION

For SSF updates and the Annual Report when released, visit: sheepsustainabilityframework.com.au

Measuring the carbon story of wool production

A new AWI-funded research project is taking carbon measurement onto a commercial wool-growing property, with the aim of developing a practical and credible way to account for the carbon moving through Australian sheep production systems.

For woolgrowers, carbon accounting is increasingly becoming part of the conversation with brands, processors and international markets. But accurately accounting for the carbon performance of a grazing enterprise is complex.

Sheep produce greenhouse gas emissions, but at the same time pastures take carbon dioxide from the atmosphere as they grow, while carbon is continually moving between plants, animals, soil and the atmosphere.

Understanding those movements – known as **biogenic carbon fluxes** – is the focus of a new two-year project funded by Australian Wool Innovation (AWI). The *Biogenic carbon flux measurement in sheep production systems* project aims to demonstrate a credible and scalable way of quantifying the net carbon footprint of Australian wool production.

Led by Agrimix in partnership with Integrity Ag, Achill Station and measurement technology company LI-COR, the project will combine direct on-farm measurement with soil, climate, pasture, livestock and farm management data.

Importantly, the work is designed to account for both sides of the carbon equation – livestock and production emissions as well as carbon flows and removals in pasture biomass and soil.

AWI Environmental Sustainability Manager Edward Fernie said increasing sustainability and reporting requirements across global textile and fashion markets meant credible evidence was becoming increasingly important.

Mr Fernie said it was important that carbon accounting reflected the whole farm system rather than livestock emissions alone.

"Grazing enterprises are biological systems, with carbon continually moving through livestock, pastures and soils. Looking at emissions alone only tells us part of the story of how carbon moves through a wool growing enterprise," Mr Fernie said.

"The aim is to give woolgrowers a practical and more cost-effective way to understand their carbon performance, inform management decisions and demonstrate their environmental outcomes to the market."

Measuring carbon on-farm

At the centre of the project is an eddy covariance flux tower being deployed at a commercial wool-growing property. The tower continuously measures the exchange of carbon dioxide between the land and atmosphere, providing researchers with direct information about whether the area being measured is taking up or releasing carbon over time. Those measurements will be combined with baseline soil carbon sampling and detailed information including climate, stocking rates, pasture history and farm management.

Agrimix Research Program Manager Chloe Kempe said the aim was to build a much more complete picture of carbon movement within a commercial sheep production system.

"We're building a carbon account that reflects the farm as a system – the sheep, the pasture and the soil – rather than looking at livestock emissions in isolation," Ms Kempe said.

She said a grazing enterprise was a biological carbon cycle. Sheep produce greenhouse gas emissions, particularly methane, while pasture continually draws carbon dioxide from the atmosphere through photosynthesis. Some of that carbon cycles rapidly back to the atmosphere, while some can be transferred into the soil and stored for longer periods.

"If we want to understand the carbon performance of a grazing enterprise, we need to account for both sides of the ledger – the emissions being produced and the carbon moving through plants and soil."

The challenge, she said, was to quantify those flows rigorously rather than assume that one simply offsets another.

The carbon flows will be measured across approximately 21 months, allowing researchers to better understand changes in pasture and soil carbon under Australian grazing conditions.

From one property to many

Putting sophisticated carbon-measuring equipment on every wool-growing property is neither practical nor affordable. That is why the project's longer-term value lies not only in what is measured at the demonstration property, but in how those measurements can be used to improve carbon modelling for other wool-producing enterprises.

Data collected by the flux tower will be used to calibrate and validate the Agrimix Flux model for sheep and wool grazing systems.

Agrimix Flux creates a digital representation – or 'digital twin' – of a property using an ecosystem model alongside farm and environmental data. Once the model has been calibrated against actual measurements from the demonstration property, researchers will investigate how validated parameters could be applied to similar

A new AWI-funded project is examining carbon movement across the whole farm system – livestock, pastures and soils – with the aim of developing a practical and credible way for woolgrowers to demonstrate carbon performance.

wool-growing systems without requiring a flux tower on every farm.

The objective is a more practical and cost-effective pathway to robust carbon reporting at an industry scale. The project will test whether measurement can be combined with a well-calibrated model so every component of the carbon cycle does not need to be physically measured everywhere, all of the time.

Ms Kempe stressed that this is the opportunity being investigated, and the approach still needs to be demonstrated in a commercial wool enterprise.

"The opportunity is to give woolgrowers a practical, credible way to demonstrate carbon performance without making measurement so expensive or burdensome that it becomes unworkable at farm scale," she said.

Building a whole-farm picture

The project is ultimately aiming to produce a measured and modelled, verification-ready whole-farm carbon footprint for the commercial wool enterprise.

Integrity Ag will bring life cycle assessment expertise to the project, incorporating livestock and production emissions alongside measured and modelled biogenic carbon flows and soil carbon removals.

The work will also examine a verification pathway aligned with relevant greenhouse gas accounting and Science Based Targets initiative guidance.

This is particularly important as companies throughout the wool supply chain face increasing requirements to measure and report their environmental performance.

The project will investigate how robust farm-level information could support credible supply-chain insetting – where businesses invest in reducing or removing emissions within their own supply chain rather than relying solely on carbon offsets generated elsewhere.

For growers, the objective is not to add another layer of complicated measurement to the farm business.

Instead, the research is examining whether high-quality measurement on a demonstration property can underpin modelling that is sufficiently robust to be replicated more affordably across similar production systems.

If the approach can be demonstrated to be accurate, repeatable and suitable for independent verification, it could also allow growers to explore the potential effect of management changes before making significant investments on farm.

What could it mean for woolgrowers?

The project is expected to deliver four key outcomes for the wool industry: a better understanding of biogenic carbon flows in commercial sheep production; a lower-cost and scalable verification pathway; a verified whole-farm carbon footprint incorporating livestock emissions and soil carbon removals; and practical information to help growers respond to emerging market and reporting requirements.

It also has the potential to provide stronger scientific evidence of how carbon moves through Australian wool-growing landscapes, while ensuring any claims about carbon performance are supported by robust measurement and verification.

Rather than considering emissions in isolation, the project will examine the interaction between livestock, pasture, soils, climate and management across the production system.

For woolgrowers, that could ultimately provide a more credible and practical way of demonstrating the environmental performance of the wool they produce.

The project commenced in May 2026 and is scheduled for completion in March 2028. Two on-farm field days, a webinar, a woolgrower case study and resources for advisers are planned as the research progresses.

Investing in better decisions

AWI Extension connects woolgrowers with practical knowledge, specialist expertise and tools they can take back to their own businesses. From reproduction and weaner management to nutrition, feed budgeting and cost of production, the programs are designed to help growers build skills, challenge existing practices and make better-informed management decisions. For one NSW woolgrower, taking time away from the farm to participate in extension has become an investment not only in the productivity of his Merino enterprise, but in his own capability as a farm manager.

For NSW woolgrower Ben Johnson, taking time away from the farm to attend an extension workshop is not time lost from the business. It is an investment in it.

Ben has participated in several AWI Extension programs, including Winning With Weaners and AWI Feed Budgeting Masterclass, as well as reproduction-focused training. Most recently, he travelled eight hours to Wanganella in southern NSW to attend a cost of production workshop.

"I see these courses as an investment in my business and in myself," Ben said. "It is a genuine investment in my farm."

It is an investment Ben believes does not require a dramatic change in production to pay its way.

"How many weaners do I have to save? How many grams do I have to put on them? Or how much grain do I need to save by going to one of these half-day courses to justify that time off-farm?" he said.

"You don't have to make massive improvements to justify attending them and trying to learn something."

That calculation is at the heart of why Ben has become increasingly committed to professional development. A small improvement in weaner survival, growth rates, feed use, reproduction or another management decision can be multiplied across a flock and over several seasons.

For Ben, however, the value of extension goes beyond individual production gains. The workshops provide an opportunity to step away from the day-to-day demands of farming, hear from specialists and reconsider the way things are done at home.

He describes the experience as reinvigorating and values the opportunity to learn directly from people with deep expertise in their field.

The AWI Feed Budgeting Masterclass was a particular example. Ben said the practical nature of the session and the way the

information was simplified made it immediately useful.

A change in mindset

Ben is equally candid that attending a workshop alone does not guarantee its value. The mindset a grower brings through the door matters too. He completed Winning With Weaners several years ago and now believes he would get more from the workshop if he did it again.

"I was in a different mindset," he said.

His approach to professional development has changed since then. Rather than seeing extension simply as a source of information, Ben now views it as part of his own professional development – an opportunity to question his thinking, build his management skills and take ideas home that can be tested within his own farming system.

For Ben, that willingness to keep developing himself is increasingly important. Farming businesses invest heavily in livestock, genetics, pasture, infrastructure and machinery, but he believes the capability of the people making the decisions deserves the same attention.

That does not mean every idea will apply to every property. In fact, Ben sees that as part of the value of extension: giving producers greater knowledge with which to make their own decisions.

"Ultimately, it comes down to your management, your land and what you can and can't do," he said. The objective is not to return home and change everything. It is to return better equipped to decide what should change – and what should not.

Getting everyone on the same page

Ben also believes professional development should not stop with the farm owner or manager.

Where possible, he encourages team members and family members involved in the business to undertake training.

"I wanted everyone on the same page, using the same lingo," he said.

For Ben, the idea of a team extends beyond full-time staff to the consultants and contractors who contribute to the farm business. He believes valuing those people as team members helps create a shared understanding of why management decisions are being made and gives people the confidence and capability to take greater responsibility.

Ben has seen that value through a team member who came to agriculture from another trade and has since undertaken AWI shearing training, returning for further training because he wanted to improve his skills more. For Ben, having skilled people around him has also created opportunities for him to continue developing his own role within the business.

> "I see these courses as an investment in my business and in myself. It is a genuine investment in my farm."
>
> BEN JOHNSON, NSW

It reinforces his belief that extension should be viewed in much the same way as other investments made to improve a farming operation. There is also an opportunity, he believes, for more woolgrowers to take advantage of the programs available. Having experienced the value himself, Ben would like to continue to see extension opportunities promoted strongly so producers know what is available and make the choice to participate.

Ultimately, his measure of value remains refreshingly straightforward. If several hours away from the farm helps save a few more weaners, improve growth, use feed more efficiently or simply results in one better management decision, the return quickly outweighs the time invested.

And for Ben, investing in himself – and in the skills of the people around him – is every bit as important as investing in the physical assets of the farm.

MORE INFORMATION
wool.com/training-extension/awi-grower-networks/

More than a Merino producer

How Western Australian woolgrower Emily Stretch is helping shape the next generation of Australia's Merino industry.

For Emily Stretch, the future of Australia's Merino industry isn't something to worry about.

It's something to build. Growing up on her family's mixed farming operation near Mobrup in Western Australia, she was the child who couldn't wait to jump off the school bus and head straight for the shearing shed.

"I'd throw my school bag at Mum and say, 'Bye, I'm going to the shed,'" she recalled.

It was where she felt most at home. Today, that passion remains as strong as ever.

Emily is part of a family farming business operating across around 3,800 hectares in Western Australia's sheepbelt, producing Merino sheep alongside canola, wheat, barley, and oats. Depending on seasonal conditions, the family crops around 1,600 hectares while running between 10 to 18,000 sheep, including a breeding flock of approximately 5,000 to 6,000 Merino ewes.

It is a genuinely commercial enterprise where every decision must deliver value. After years of producing first-cross lambs, the family recently returned to a fully self-replacing Merino operation – a decision driven by both economics and confidence in the breed's future.

"We moved back to a full Merino operation because of our passion for wool and the economic drivers within our business," Emily said.

> "Our goal is to produce a productive dual-purpose Merino that delivers both wool and meat."
>
> EMILY STRETCH, KOJONUP, WA

"Crossbred wool simply wasn't making us enough money. Our goal is to produce a productive dual-purpose Merino that delivers both wool and meat."

That decision reflects the way Emily approaches farming. Every management decision is viewed through the lens of productivity, profitability and long-term sustainability.

Learning beyond the farm gate

Like many young producers, Emily didn't know her future would eventually lead back to the family farm. The journey back to the land, however, was anything but straightforward.

Rather than immediately stepping into the business, she spent years working across different parts of agriculture – from corporate farming to pastoral stations – absorbing ideas, management styles and production systems.

Looking back, she believes those experiences shaped the producer she has become.

"One of the best things I ever did was work on other people's farms," she said.

WA woolgrower Emily Stretch with a bale from Stretch Enterprises. Emily combines practical farming with science and data to drive productivity across the family's Merino enterprise.

"You learn what works for them, what works for you and then decide what pieces are worth bringing home."

She laughs now about returning from field days determined to implement every new idea she encountered.

Experience, however, taught her a valuable lesson.

Not every innovation suits every enterprise.

"There is so much information available," she said.

"But you don't have to act on every piece of information that's given to you."

Instead, Emily believes success comes from understanding your own production system and selecting the practices that genuinely improve it.

Science meets practical farming

Emily describes herself as someone who walks through life with "empathy and science".

It's a philosophy that underpins both the family farm and the consultancy business she is now building alongside it.

Her goal is simple – helping producers work smarter, not harder.

Rather than focusing on one discipline, Emily works across whole-farm systems, helping producers identify where efficiencies can be gained and better decisions made.

"I want to create a space where people feel safe to ask questions," she said.

"If we're not willing to say, 'I don't know', then we're not giving ourselves the opportunity to learn."

That curiosity has fuelled a growing passion for livestock data, parasitology and animal health.

Emily provides worm egg counting services through her consultancy and views parasite management as one of the industry's biggest opportunities to improve productivity.

Her family also operates a fully non-mulesed Merino enterprise – something she says requires careful planning, genetics and management rather than shortcuts.

"I've somehow managed to combine science and laboratory work with Merinos," she laughed.

"And it helps our bottom line."

Despite her love of data, Emily is quick to point out that numbers alone never tell the whole story.

"My connection to the land and the animals usually tells me something is wrong first," she said.

"Then I go back to the science and ask why."

The next leap forward

Emily believes the Australian sheep industry is only beginning to unlock the potential of data.

While cropping enterprises have rapidly adopted digital technologies, she believes livestock production still has significant room for improvement.

"In cropping we've become very good at sharing and using data," she said.

"Then we get to livestock and we're still carrying a notebook around in our top pocket."

She believes future productivity gains will come from measuring the right information rather than simply collecting more of it.

"We're still working with older systems and older metrics," she said.

"The challenge is identifying the information that genuinely helps us make better decisions."

Women quietly changing agriculture

Although Emily has become a respected voice within the sheep industry, she has never viewed being a woman in agriculture as a disadvantage. Growing up, she was surrounded by capable farming women.

"There are probably ten farms around us where daughters have come home to farm," she said.

"For me, that was just normal."

Emily Stretch believes the Merino industry is full of opportunity for the next generation – from farming and genetics to science, technology and animal health.

She has, however, noticed a shift in recent years. Not because women suddenly arrived in agriculture. Because they are increasingly prepared to stand up and be heard.

"We've always been there," she said.

"We're just stepping forward a little more."

Emily believes agriculture benefits when different perspectives are welcomed.

Whether discussions centre on science, management or changing traditional practices, she approaches differing opinions with curiosity rather than confrontation.

"I always see those conversations as opportunities to learn."

Looking beyond the farm gate

Emily's willingness to embrace different ideas was reinforced during a recent Australian Wool Innovation grower visit to China. Seeing Australia's wool transformed into premium products gave her an entirely new appreciation for the global supply chain.

"It's not about us and them," she said.

"We're one supply chain."

Walking through highly automated processing facilities challenged many of the assumptions she had held before the trip and strengthened her appreciation of Australia's relationship with one of its most important trading partners.

For Emily, the experience reinforced the importance of remaining open-minded and actively choosing collaborative approaches to our challenges – something she believes will become increasingly important for Australian producers.

A future built on opportunity

Ask Emily what excites her most about the future of wool and the answer comes quickly.

"This magical fibre is natural, biodegradable and sustainable," she said.

"The sky really is the limit."

She also believes the Merino industry offers more career opportunities than many young people realise.

"If you love Merinos and you love Excel spreadsheets, maybe genetics is your thing," she said.

"If you love Merinos and nature, maybe you'll become a farm manager.

"There are so many careers built on the back of the Merino industry."

Emily doesn't believe wool is an industry in decline. Quite the opposite.

"There are huge areas of Australia that will always be suited to sheep," she said.

"I don't see it as a dying industry.

"I see it as a place full of opportunity, as long as we're willing to stay open-minded."

For someone equally at home in a sheep yard, behind a microscope or standing in front of a room full of producers, Emily Stretch represents something bigger than the next generation of Merino producers.

She represents the next generation of thinking.

And for the Australian wool industry, that's an exciting place to start.

Where wool can take you

For many young Australians growing up around wool, a career in the industry might traditionally have meant working on farm, in the shearing shed, in livestock or agricultural services.

But follow an Australian wool fibre beyond the farm gate and an entirely different world of careers opens up.

From wool buying, exporting and processing to textile science, product development, sustainability, marketing, fashion and design, the global wool supply chain relies on people with an extraordinarily broad range of skills.

A new careers resource on the Woolmark Learning Centre is helping students and young professionals discover those opportunities and understand where a career involving wool could take them.

The resource builds on AWI's broader investment in education, providing a pathway for people to learn about wool and the industries surrounding it.

The Woolmark Learning Centre offers free digital coursework covering the wool supply chain, with learning ranging from an introduction to the fibre through to wool science, processing, textile manufacturing, knitwear and woven textile design.

Importantly, that education connects the fibre grown on Australian farms with the people who will eventually specify, process, innovate with, market and design with wool around the world.

For woolgrowers, attracting those people matters.

The future demand for Australian wool depends not only on producing a high-quality fibre, but on having skilled and enthusiastic people throughout the supply chain who understand what wool can do and continue finding new applications and markets for it.

That can begin long before someone has decided they want a career in wool.

A student interested in science might discover opportunities in fibre technology or textile engineering. Someone drawn to sustainability could work with natural fibre supply chains and traceability. Others may find their place in manufacturing, product development, marketing, retail or fashion.

The common thread is wool.

Programs such as the Woolmark Performance Challenge are another way Woolmark is connecting emerging talent with the global industry.

The annual challenge asks university students to develop innovative product solutions using Merino wool, bringing together education, industry expertise and real-world experience.

For some participants, those opportunities have become the beginning of a career.

From Woolmark Challenge to Prada

For 2023 Woolmark Performance Challenge winner Joon Han, participating in the competition became part of a journey that has now taken him into the international fashion industry.

Following his success in the challenge and the opportunities that followed, Joon has secured a full-time role with Prada.

His progression is a tangible example of what wool industry education and engagement can achieve: introducing talented young people to the fibre, connecting them with industry and giving them opportunities to apply their skills in a commercial environment.

The Woolmark team has continued to follow Joon's career since the competition, with his latest achievement marking another step in a relationship that began through wool.

Opening the door

Not every person who explores the new careers resource will ultimately work directly with wool.

But giving students and young professionals visibility of the breadth of the industry is an important first step.

For Australian woolgrowers, the people entering those careers may seem a long way removed from the paddock.

In reality, they are part of the same supply chain. They will be the scientists exploring the fibre's performance, the manufacturers turning it into new textiles, the designers specifying it in their collections and the marketers telling consumers why natural fibres matter.

The sheep and the fibre may be where the wool story begins.

The people who take it from there will help determine where it goes next.

MORE INFORMATION
Explore careers in wool through woolmarklearningcentre.com

Where could wool take you?

A career in wool can take many different directions:

- Wool buying and exporting
- Textile science and technology
- Processing and manufacturing
- Product development and innovation
- Sustainability and traceability
- Fashion and textile design
- Marketing and communications
- Retail and brand development


CLiK™
DUOSTAR™
The new star that delivers dual protection against flystrike.
• Dual active ingredients • Dual mode of action • Dual

New CLiK™ Duostar™ contains **dual active ingredients** and **dual modes of action** for **dual activity** against blowfly strike. This unique formulation combines the proven power of dicyclanil and ivermectin to protect against blowfly strike for 18–24 weeks when applied off-shears or to sheep with any length wool; treat existing blowfly strike; and protect mulesing and marking wounds.[1] Contact your local rural supplier and give your sheep the dual protection of CLiK Duostar this season.

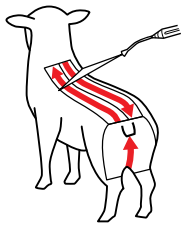
CLiK Duostar delivers +33.3% more dicyclanil than CLiK and +2.6% more dicyclanil than CLiK Extra when applied for prevention of body and breech strike on >50 kg sheep.[1]

CLiK SPRAY ON

>50 kg live weight

2 x 12 mL (body) +
1 x 12 mL (breech)

= 36 mL x 50 g/L
= 1.8 g dicyclanil



CLiK EXTRA

>50 kg live weight

2 x 9 mL (body) +
2 x 9 mL (breech)

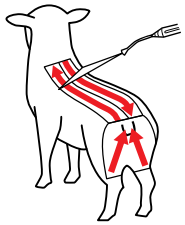
= 36 mL x 65 g/L
= 2.34 g dicyclanil

CLiK DUOSTAR

>50 kg live weight

2 x 12 mL (body) +
2 x 12 mL (breech)

= 48 mL x 50 g/L
= 2.4 g dicyclanil



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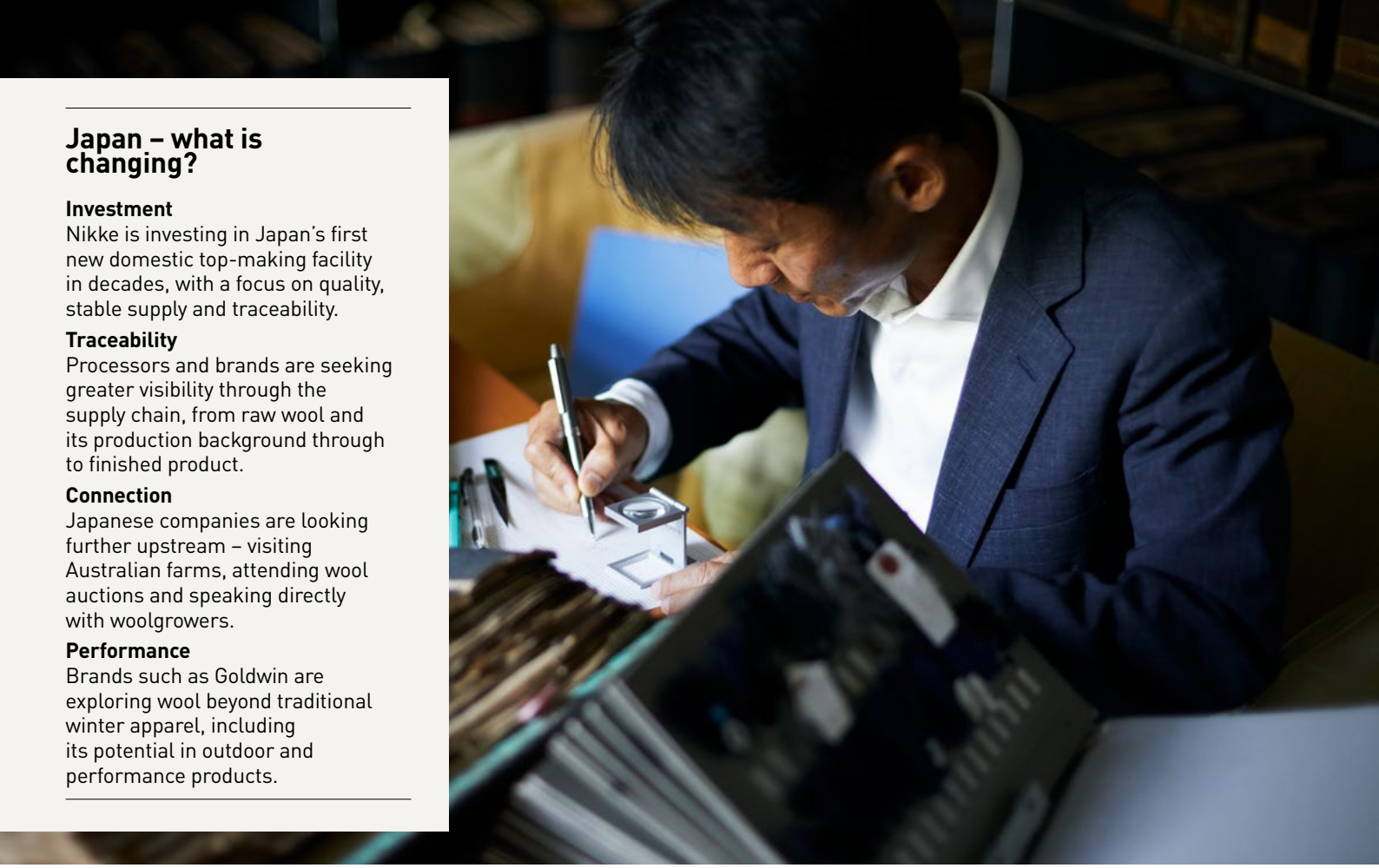


Japan – what is changing?

Investment
Nikke is investing in Japan's first new domestic top-making facility in decades, with a focus on quality, stable supply and traceability.

Traceability
Processors and brands are seeking greater visibility through the supply chain, from raw wool and its production background through to finished product.

Connection
Japanese companies are looking further upstream – visiting Australian farms, attending wool auctions and speaking directly with woolgrowers.

Performance
Brands such as Goldwin are exploring wool beyond traditional winter apparel, including its potential in outdoor and performance products.

Japan looks upstream

From new investment in wool processing to brands visiting Australian farms and buyers attending Australian auctions, Japan's wool industry is strengthening its connection with Australian Merino – and the growers behind it.

Japan has been an important market for Australian wool for generations, but the relationship is continuing to evolve.

Across processing, trading and performance apparel, Japanese companies are looking further back through the supply chain – seeking greater understanding of where wool comes from, how it is produced and the people behind it.

The reasons vary. For processor Nikke, investment in new domestic top-making capacity is about quality, stable supply and traceability. For global sportswear and outdoor brand Goldwin, coming to Australia provided an opportunity to understand wool production, provenance and the fibre's performance potential first-hand. For wool company Motohiro Corporation, regularly attending Australian wool auctions and maintaining direct relationships with growers provides information that specifications alone cannot capture.

Together, their perspectives provide a snapshot of a sophisticated Japanese market in which quality remains fundamental, but reliability, transparency, provenance and stronger connections across the supply chain are becoming increasingly important.

Nikke invests in wool's future

One of the clearest signals of confidence in wool is coming from the Nikke Group, which is investing in Japan's first new domestic top-making facility in decades.

Nikke CEO Mr Yutaka Nagaoka said the investment was not simply about bringing processing back to Japan, but creating greater value through improved quality, stable supply and traceability.

"This project is not merely a return to domestic production; it is an initiative aimed at creating new value for the wool industry in Japan," Mr Nagaoka said.

"Through improvements in quality, stable supply, and traceability, we aim to further enhance the value of wool in both the Japanese and global markets."

The investment comes as global supply chains place increasing value on reliability, transparency and risk management alongside cost efficiency. Nikke will continue working within its international processing network, including with key partners in China, while strengthening its domestic capability.

The new facility is designed to improve quality control, shorten lead times and allow Nikke to respond more quickly to market needs, creating a more flexible processing pathway. For Australian woolgrowers, however, one of the most important elements is what sits at the beginning of that pipeline: reliable access to quality Australian Merino wool.

"This investment supports long-term demand for Australian Merino wool... [and] stable supply is a prerequisite for this investment," Mr Nagaoka said.

Traceability will also be built more closely into the processing system, with Nikke planning integrated management from raw material through to finished product.

Mr Nagaoka said Australia's existing systems were an important strength, describing its traceability infrastructure as among the most advanced in the world.

Nikke is committed to creating closer links between fibre origin, sustainability expectations and downstream demand. For Mr Nagaoka, that relationship begins with growers. For Mr Nagaoka, that relationship begins with growers.

"You are not merely suppliers, but vital partners with whom we create long-term value together."

MR YUTAKA NAGAOKA, NIKKE

"You are not merely suppliers, but vital partners with

whom we create long-term value together... your efforts form the foundation of our business," he said.

Goldwin comes to the source

At the brand end of the supply chain, Japanese global sportswear and outdoor company Goldwin is also looking more closely at the origins of the fibres it uses.

"As a brand, actually meeting woolgrowers is very rare."

That was one of the strongest reflections from Goldwin Chief R&D Officer Mr Arai during a recent visit to Australia as the company deepens its understanding of Australian wool and its role in future material development. Goldwin is reviewing and updating its Raw Material Procurement Guidelines, with transparency, traceability and responsible sourcing becoming increasingly important across its global operations.

During the Australian visit, the delegation visited wool-growing properties and auction rooms, providing the team with a first-hand view of the journey from farm through to sale.

Mr Toru Shibata, whose work includes developing materials to reduce environmental impact through changes in raw materials and contributing to guidelines for raw material and component procurement, said direct conversations with growers were particularly valuable.

"Going to farms, listening to what woolgrowers had to say and asking questions directly was very important," Mr Shibata said.

"Actually, being in Australia and hearing directly from woolgrowers helps us better understand the future of wool products and Australian provenance."

The visit also gave Goldwin's team an opportunity to look beyond wool's traditional associations with sweaters and winter clothing and consider its potential across outdoor and active apparel.

Mr Shibata said wearing wool during activities such as hiking had helped demonstrate its comfort, versatility and natural odour resistance.

L–R Shigeki Tobe (Motohiro), Tim Marwedel (Schneider), Tetsuya Motohiro (Motohiro), Yoshiyasu Kaneda (The Japan Wool Textile/Nikke), Samuel Cockedey (Woolmark), Yutaka Nagaoka (The Japan Wool Textile/Nikke), Bryan Fry (Woolmark), Stephen Hill (Woolmark), Akira Okada (The Japan Wool Textile /Nikke) at Sydney HQ office.

"If you put the wool on and wear it, then you personally know the benefit of it and how good it is," he said.

Goldwin already incorporates wool through brands such as Icebreaker, while opportunities are continuing to emerge for wool-based performance products across its broader portfolio, including future developments within Goldwin and THE NORTH FACE. The visit also reinforced the value the company places on Australian provenance and long-term confidence in supply.

"In the future, there might be times where you want to make wool products, but you won't be able to, so protecting Australian provenance will be important," Mr Arai said.

Motohiro links growers with the market

For Motohiro Corporation, understanding Australian wool begins well before the fibre reaches a mill or manufacturer.

Motohiro is one of a relatively small number of Japanese companies whose buyers regularly participate in Australian wool auctions. The company says attending sales directly allows it to gather first-hand market information without relying solely on the assumptions or intentions of intermediaries, while maintaining direct relationships with Australian woolgrowers.

Those relationships allow Motohiro to understand more than the specifications attached to a bale. Combining the expertise of wool buyers with communication with individual growers provides insight into the production background that numerical data alone cannot capture – information that can then be communicated further along the supply chain.

Motohiro operates across Australia, China, Japan and Europe. Australia is central to sourcing raw wool, collecting market information and communicating with growers; in China the company works with wool processors and purchases processing by-products; while in Japan and Europe its activities include selling processed wool such as tops, carbonised noils and carbonised wool.

After more than 20 years communicating directly with Australian woolgrowers, Motohiro regards Australia's wool industry infrastructure as a significant competitive strength. It points particularly to the high rate of raw wool testing through AWTA, the established AWEX auction system and comprehensive industry databases, which it considers to be at a level unmatched by other wool-producing countries.

The opportunity, according to Motohiro, is to make greater use of those strengths when communicating and promoting Australian wool internationally.

Traceability and certification are increasingly part of that market conversation. Motohiro has joined the Woolmark+ Insetting Program because of its expectations for the development and communication of an Australian-specific approach to traceability and sustainability. However, its message to growers carries an important qualification.

International customers are placing increasing importance on certification and the background behind those certifications, but Motohiro cautions against certification becoming an independent measure of value at the expense of wool quality.

Its preference is for a neutral traceability system established by the Australian wool industry and recognised through downstream markets, while maintaining the principle that high-quality wool should attract value based on its quality.

Across all three businesses, the message from Japan is not that one attribute will determine wool's future. Quality, reliable supply, traceability and provenance are increasingly interconnected – and so too are the relationships between the people growing the fibre and those processing, developing and ultimately selling it.

What Japan is telling Australian woolgrowers

The perspectives of Nikke, Goldwin and Motohiro converge on several fundamentals. Quality remains central, but customers are also looking for confidence in supply, greater traceability and credible information about provenance and production. Direct relationships with Australian woolgrowers are helping Japanese businesses understand what sits behind the fibre – while giving growers a clearer connection to the processors, brands and products at the other end of the supply chain.

Images by Shannon Donoghue

When the seasons turn

Few images demonstrate the cycle of Australian agriculture quite like these.

Eighteen months ago, large parts of South Australia's agricultural country were drought-stricken – paddocks bare, dams depleted and livestock producers feeding stock through one of the most severe dry periods in memory.

Across the Adelaide region, rainfall during 2024–25 was 43 per cent below the long-term average, making it the driest reporting period on record. Across much of South Australia's agricultural areas, rainfall over the 18 months from February 2024 fell to record-low levels. For woolgrowers, the consequences were familiar: declining pasture availability, supplementary feeding, destocking and difficult decisions about how best to protect breeding flocks.

Then the season turned.

Rain through the second half of 2025, followed by above-average autumn and early winter rainfall in 2026, transformed much of the landscape. Where paddocks had been brown and depleted, feed returned – a dramatic turnaround captured in these before-and-after photographs.

It is also a reminder of something Australian woolgrowers understand well: drought is part of the production cycle, but so too is recovery.

And while conditions have improved considerably across much of South Australia, the dry has shifted elsewhere.

By the end of July, serious to severe rainfall deficiencies had developed or intensified across parts of north-eastern NSW and southern Queensland, as well as south-west and parts of the Pilbara–Gascoyne region of Western Australia. Longer-term rainfall deficiencies also remain across parts of southern NSW, including country through the Monaro, where producers are again contending with dry conditions.

The seasons turn – sometimes remarkably quickly. For those enjoying the recovery, it is welcome relief. For those now facing the dry, the cycle continues.

MORE INFORMATION
wool.com/drought

New markets, stronger supply chains

AWI is helping build wool-processing capability in new locations around the world – creating more sourcing options for brands and greater demand resilience for Australian woolgrowers.

"It's about diversifying the wool supply chain, reducing sovereign risk and increasing competition."

STEPHEN HILL,
AWI GENERAL MANAGER
INTERNATIONAL

Why diversification matters

Global textile supply chains are being redrawn. Rising costs, pandemic-era disruption, tariffs, geopolitical conflict and demand for sustainable, traceable production are pushing brands towards shorter, simpler networks. Onshoring, nearshoring and the 'China +1' approach have lifted interest in locations such as Portugal and Mexico.

For AWI and Woolmark, the objective is not to displace China. "China will continue to be the dominant market for wool in regard to processing and also has strong growth potential as a consumer market, and we don't want to take away from that," Hill said. "It's about growing new demand in new sectors, new categories and new areas, for example blends."

What makes a market ready?

"Emerging markets need to show potential for increasing existing wool processing, or building capability of their current supply chain in other fibres and textile activities," Hill said. "Favourable cost structures, labour availability, geographic location and economic trade advantages are key considerations and drivers."

AWI tests market size, growth potential, political stability, GDP and textile exports, then considers existing wool processing, skills and the local supply-chain network. We continue to build on the work done over the past years in Bangladesh and Portugal, whilst moving more into exploring opportunities in Central & South America, Thailand, Indonesia, and Eastern Europe.

From awareness to a commercial supply chain

"We aim to identify and target destinations to diversify the global wool supply chain by supporting emerging markets to become commercially viable options for brands and retailers to source and process wool," Hill said.

Work begins with wool and Woolmark awareness, followed by technical transfer and product development. As capacity grows, AWI connects local producers with brands, retailers and other buyers.

AWI has in-market support in Bangladesh, Vietnam, Mexico and Peru, and is looking to strengthen its presence in Thailand, Cambodia and Central America while assessing opportunities such as Indonesia.

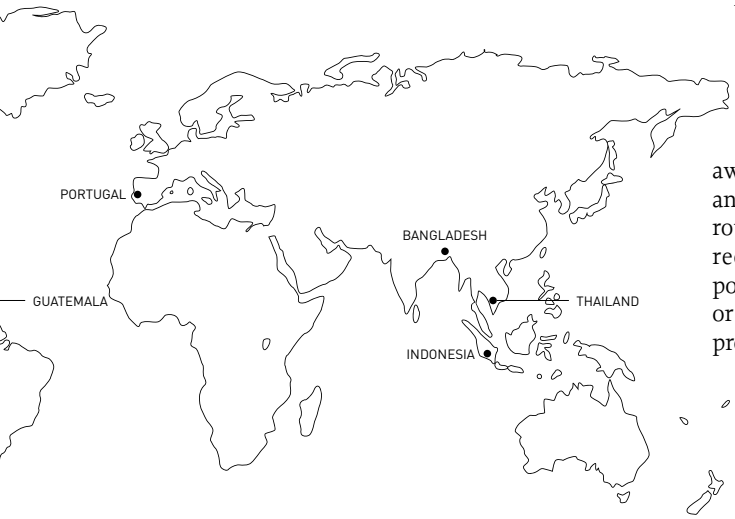
India shows the pathway

Not every target remains an emerging market forever. "India is a mature market, the second biggest importer of Australian wool," Hill said, noting Woolmark has had a presence there for 60 years.

India's growing consumer market, vertically integrated supply chain, skills and investment capacity offer further room to expand wool.

Vietnam is following a similar trajectory. "Vietnam has now arguably graduated to a mature market," Hill said. Over Woolmark's 14-year presence, the country has expanded from a strong base in knitting, weaving and garment making to include wool spinning and dyeing.

Brands can source Vietnamese wool products beginning at yarn selection. A skilled workforce, competitive pricing and trade links strengthen the proposition; scouring and top making are the remaining stages needed for a fully vertical wool supply chain.



Vietnam: building a wool manufacturing market

Vietnam is a strong example of how Woolmark is helping develop new manufacturing markets for wool. We began working with Vietnam's textile industry in 2012, when wool processing in the country was relatively limited. Today, we have more than 90 partners in Vietnam, including spinners, flatbed and circular knitters, and garment manufacturers. This work has included transferring technical know-how for wool manufacturing, connecting businesses with suppliers of raw materials, chemicals and machinery, and organising international trade missions to connect Vietnamese manufacturers with global brands and buyers.

The development of local wool-spinning capacity has been an important part of this growth. In recent years, three major wool spinners – Südwolle Group's Dalat Worsted Spinning, Xinao and Lugang – have established spinning and dyeing operations in Vietnam, improving access to wool yarn for manufacturers in Vietnam and across Southeast Asia. This year also marked another significant development, with long-term Woolmark partner Youngone opening its Wool Development Centre at its Nam Dinh facilities. The centre will provide a dedicated hub for Woolmark to run technical workshops and events with international brands and supply-chain partners, while enabling Youngone to further develop and showcase its wool manufacturing capabilities with support from Woolmark's technical team.

Woolmark continues to build wool-processing capability in Vietnam through technical knowledge transfer, product development and connections between manufacturers, suppliers, brands and buyers.

A direct benefit for woolgrowers

For Australian woolgrowers, the commercial logic is straightforward. "Woolgrowers are direct beneficiaries of increased demand and competition, reflected in the raw material price," Hill said. "Diversification and reduced sovereign risk can help mitigate unforeseen geopolitical shifts."

More viable processing locations give brands new sourcing options while reducing exposure to sudden changes in tariffs, trade sanctions, energy costs or regional disruption.

The road ahead

Over the next three to five years, AWI wants wool to move with the wider diversification of global textiles. "We want to keep in line with these changes and ensure wool products can be sourced from competitive, capable markets," Hill said.

That means continuing to build wool awareness and capability in supported markets, deepening supply-chain partnerships and helping promising destinations become commercially viable production options. It also means remaining ready to pivot as costs, policies and buyer priorities change.

Building capability that lasts

Long-term progress depends on moving beyond one-off promotion. The sequence Hill describes – awareness, technical transfer, product development and buyer introductions – gives each market a practical route from interest to repeatable production. It also recognises that destinations start from different positions: some already have advanced knitting, weaving or garment capacity; others need more of the wool-processing chain before they can offer brands a complete sourcing proposition.

The comparison between India and Vietnam illustrates how that capability can compound. India combines established wool expertise with a growing consumer market and an integrated supply chain. Vietnam built on strengths in downstream manufacturing, then added spinning and dyeing. Its remaining opportunity – scouring and top making – shows that diversification does not happen in a single step; it develops as investment, skills and commercial confidence accumulate.

More options, without replacing China

That gradual expansion is central to AWI's strategy. A wider network does not depend on any one country matching China's scale. Instead, each commercially viable market adds another option for a particular product, category or customer. Together, those options give brands more flexibility to respond when tariffs, sanctions, energy costs or regional disruption alter the economics of sourcing.

For Australian woolgrowers, the value of that network lies in additional competition for the fibre.

FlockMate is developing technology to capture sheep measurements as animals move naturally past a sensor system, without the need for individual handling.

FlockMate puts sheep measurement in a new frame

Regular liveweight data can tell woolgrowers a lot about how their sheep are performing – from growth and condition to feed availability and readiness for key production stages.

The challenge is collecting that information regularly across an entire flock without adding another labour-intensive job to the farm calendar. A new research project led by CSIRO is looking to change that.

FlockMate, a two-year project co-funded by Australian Wool Innovation (AWI), Meat & Livestock Australia (MLA) and CSIRO, is developing technology designed to estimate sheep liveweight and fleece weight in real time as animals move naturally past a sensor system.

The aim is to provide more frequent, whole-of-flock measurements without the need for manual handling or relying on individual sheep voluntarily engaging with a weighing system.

Why liveweight matters

Liveweight – the combined weight of the sheep and its fleece – is an important production measure that can provide insights into feed availability, animal health and performance at key stages including lambing and preparation for sale.

Tracking changes in liveweight over time can also help identify shifts in growth or condition, giving producers another source of information to support management decisions.

But consistently capturing that data across large numbers of sheep remains difficult.

CSIRO Principal Research Scientist Dr Sabrina Greenwood said FlockMate was focused on finding a more practical way to collect the information under commercial farming conditions.

"Liveweight gives us important insights into how animals are performing but collecting that information consistently and across an entire flock can be difficult," Dr Greenwood said.

"FlockMate is developing a way to capture that data more efficiently and in a way that fits within normal farm operations."

Sheep, sensors and AI

At the centre of FlockMate is a multimodal sensor system that captures high-resolution 3D images of individual sheep as they move within view of the sensors. CSIRO Quantitative Imaging Team Leader Dr Xun Li said advanced artificial intelligence and computer vision algorithms then analyse the data.

"Advanced AI and computer vision algorithms then analyse the data to generate accurate estimates of body volume, liveweight and fleece weight, with each measurement automatically associated with the animal's Radio-Frequency Identification (RFID) tag," Dr Li said.

How Flockmate works

1. **Sheep move past the sensors**
   The system is designed to capture measurements as sheep move naturally within view of the sensors, without the need for individual handling or voluntary engagement with a weighing system.
2. **3D images are captured**
   A multimodal sensor system captures high-resolution 3D images of each individual animal.
3. **AI analyses the data**
   Advanced artificial intelligence and computer vision algorithms analyse the images to estimate body volume, liveweight and fleece weight.
4. **Results are linked to the sheep**
   Each measurement is automatically associated with the animal's RFID tag, allowing changes to be tracked over time.

The aim

More frequent, non-invasive monitoring of sheep performance without interrupting normal farm operations.

"This enables frequent, non-invasive monitoring without interrupting normal farm operations."

Importantly, the technology is being designed to collect measurements as sheep go about their normal movements, rather than requiring animals to be individually handled or trained to interact with a weighing system.

If successful, that could allow producers to build a much more regular picture of changes in liveweight throughout the growth and production cycle.

Testing it on sheep

Early FlockMate prototypes are being developed and tested at CSIRO's Chiswick Research Station in New South Wales.

The 1,500-hectare research property runs a Merino flock of about 2,700 breeding ewes, providing researchers with an opportunity to develop and test the technology under practical sheep production conditions.

The project is also drawing on insights from the Sustainable Chiswick Project, a separate but complementary initiative investigating on-farm sustainability and innovation.

However, researchers are not developing FlockMate in isolation.

More than 20 producers have already provided input into how they would use the technology and what it would need to deliver to work effectively in commercial sheep enterprises.

Dr Greenwood said that feedback was playing an important role in the development process.

"We've worked closely with producers to understand how they would use a system like this on farm, and that input has been crucial in shaping the design," she said.

"Their feedback has ensured that the system is practical and reflects the real on-farm conditions that producers are working in."

The project team will continue working with producers and supply chain stakeholders at key stages of development, with the aim of ensuring the technology is fit for purpose and has the potential to be adopted at scale.

More information, without more handling

For woolgrowers, the potential value of FlockMate lies not simply in replacing a trip across the scales, but in increasing the amount and frequency of information available about individual animals and the flock as a whole.

Regular measurements linked automatically to each sheep's RFID tag could provide producers with a clearer picture of how animals are tracking over time, while reducing the labour and handling traditionally associated with collecting that information.

The addition of estimated fleece weight could further expand the production information available from the system.

FlockMate is still in the research and development phase, with work continuing to refine and validate the technology.

While the current project is focused on sheep, researchers believe its outcomes could ultimately have applications in cattle and other livestock industries, providing a foundation for future digital livestock monitoring technologies.

For now, the focus remains firmly on developing a system that can work where it matters – under practical Australian sheep production conditions.

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References: 1. Elanco National Drench Check Summary 2022-2025 (PM-AU-26-0505). 2. Playford, M.C. *et al.* (2014). Prevalence and severity of anthelmintic resistance in ovine gastrointestinal nematodes in Australia (2009-2012). *Aust Vet J* 92(12):464–471. 3. Monepantel is a member of the amino-acetonitrile derivative (AAD or 'orange') family of anthelmintics. 4. Hosking, B.C. *et al.* (2010). A pooled analysis of the efficacy of monepantel, an amino-acetonitrile derivative against gastrointestinal nematodes of sheep. *Parasitol Res* 106:529-532. 5. Refer to registered label. 6. Baker, K.E. *et al.* (2012). Efficacy of monepantel and anthelmintic combinations against multiple-resistant *Haemonchus contortus* in sheep, including characterisation of the nematode isolate. *Vet Para* 186(3–4): 513–517. Zolvix Plus contains 25 g/L monepantel and 2 g/L abamectin.

AWI and MLA back next phase of flystrike vaccine development

Australian Wool Innovation (AWI) is continuing its long-term investment in research towards a vaccine for flystrike, with a new project underway to build on years of research with CSIRO and move the technology closer to a practical, commercially viable option for Australian woolgrowers.

Flystrike remains one of the most significant animal health and welfare challenges facing the Australian sheep industry. An effective vaccine could provide woolgrowers with an additional tool to protect sheep, while reducing production costs, the use and reliance on chemical insecticides and supporting the industry's animal welfare and social licence objectives.

AWI and CSIRO have invested in flystrike vaccine research over many years. CSIRO has explored a range of approaches in engineering vaccines and tested them for the control of flystrike. Since the start of the project in 2019, 93 different formulations of vaccines have been tested in sheep.

The research has shown that the experimental vaccines can produce a strong immune response and promising results in laboratory tests. However, these results have not yet translated into the level of protection needed in live sheep.

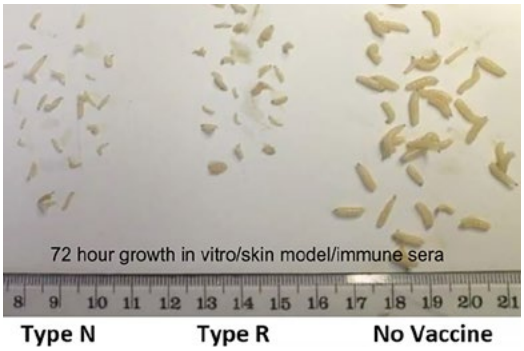
Further CSIRO research identified one possible reason: the laboratory-produced proteins used in the vaccine differ from the proteins naturally found in blowflies, particularly in their sugar structures (glycosylation). This may affect how well the sheep's immune system recognises and responds to them.

A new project has recently commenced to tackle these challenges and progress the research from fundamental science towards a commercially viable vaccine. It aims to improve the vaccine by producing antigens that more closely resemble those found naturally in blowflies, while also testing new adjuvants, vaccine formulations and delivery methods to create a stronger and longer-lasting protective response in sheep.

The project is co-funded by AWI and Meat & Livestock Australia's Donor Company (MDC), with CSIRO also contributing through Victorian Government Livestock Biosecurity Funds.

How the vaccine is administered will be another important area of research. The team will compare dermal, intramuscular and subcutaneous delivery, as well as investigating slow-release pellet technologies that could potentially provide longer-lasting protection.

Together, these areas of research are intended to address the key technical challenges that remain between the promising results achieved through fundamental research and a vaccine capable of delivering effective protection in sheep under practical conditions.



Larvae recovered after feeding for 72 hours on serum from vaccinated sheep in an in vitro feeding assay.

MORE INFORMATION
wool.com/flystrikelatest

"Why can't we do more with crossbred wool?"

For ZIAKE founder Bec Malseed, that question became the fire in her belly.

Top: ZIAKE's laptop bag represents a commitment to conscious consumption, featuring natural Australian wool that supports local farming communities.

Bec speaks with the same energy and curiosity that first pushed her to challenge what broader wool could become.

Working alongside sheep producers, consultants and veterinarians across south-west Victoria during her time managing Lifetime Ewe Management (LTEM), Bec repeatedly heard the same frustration from crossbred woolgrowers.

"It's costing us more to shear than what we're getting on our return for wool."

At the same time, she could see the quality of the fibre sitting in front of her.

"Farmers, they'd pull their fleeces out and you'd look in and it's beautiful and white. It's just broader-type wool," Bec said.

"Why would you want to put this beautiful white wool where your feet are going to walk on it?"

For Bec, it highlighted a broader question around how crossbred wool had traditionally been viewed – often directed into carpets, upholstery and lower-value applications despite the quality of the fibre itself.

That question became the beginning of ZIAKE – a brand built around finding new ways to value-add Australian crossbred wool and increase potential returns for growers.

While LTEM provided valuable exposure to sheep production systems and grower conversations, Bec said the experience also highlighted an opportunity to think more

broadly about how stronger wool types could be utilised.

"There was a real frustration amongst producers," she said.

"But it also made me think – why can't we do more?"

Rather than positioning crossbred wool against finer apparel wool, Bec sees the opportunity as complementary.

"My brand is not about competing," she said.

"I don't want to compete with Merino wool brands or Merino products or supply chains.

"I want to build a collaboration where my products can actually work harmoniously with a Merino product that's already in place."

That philosophy now sits at the centre of ZIAKE's product development – using broader wool in outerwear, bags and accessories, while embracing natural fibres and biodegradability throughout the design process.

For Bec, the concept extends well beyond fashion alone. It is about changing the way people think about broader wool and challenging assumptions around where and how it can be used.

"As a consumer, my mindset is now open to wherever there is a fabric-type product – why can't we use wool for it?" she said.

That thinking has shaped every layer of the ZIAKE brand, from wool outerwear through to biodegradable design choices, including natural fibre linings and wooden buttons in place of plastic or synthetic alternatives.

"I really want to make sure that at the end of the day I can say you can go and put it in your garden, and it'll biodegrade over time," Bec said.

"I don't want plastic buttons on it. That goes against everything about wool."

The idea gained momentum after Bec travelled to New Zealand to better understand how stronger wool types were being utilised overseas.

What she found shifted her thinking.

"They've challenged the barriers of what could be done with Merino wool and said, 'Well let's now try it with crossbred wool – and what could that look like?'"

The trip also reinforced how innovation and manufacturing investment could help create new demand for broader wool.

"New Zealand seems so much more advanced in their manufacturing innovation and use of broader wool," Bec said.

"Why couldn't we do it?"

Bec said seeing wool used in insulation, architectural products and other non-traditional applications reinforced the broader opportunity for Australian wool.

"They're thinking outside the box," she said.

Back in Australia, Bec began building the ZIAKE supply chain – a process she says was strongly supported by Australian Wool Innovation (AWI).

"AWI helped me source the supply chain," she said.

"They couldn't do enough for me to find manufacturers and help me build this."

Bec said it was important growers understood the role levy-funded industry support could play in creating future opportunities.

The fitness mat provides a soft surface that feels luxurious underfoot while maintaining durability through regular use.

She said many broader woolgrowers she worked alongside during her LTEM days often questioned where their levies were being invested, particularly when returns for crossbred wool remained challenging.

"There was a real frustration amongst producers," she said.

"They'd say, 'AWI take our levies, but we're not getting anything back in return. It's all focused on Merino wool.'"

However, through building ZIAKE, Bec said she gained a firsthand understanding of the role AWI could play in helping connect growers, brands and supply-chain opportunities.

"AWI helped my brand by connecting with the manufacturers in the supply chain," she said.

"AWI helped with introductions to overseas manufactures in different countries.

Without their help, I'm not sure I would have achieved the progress of where I am today."

Bec said it was important growers understood the value of industry investment across the broader supply chain.

"Your levies actually helped create a potential new value-adding opportunity with crossbred wool," she said.

But while support and connections helped open doors, the process of building a brand from scratch has also come with significant challenges.

One of the biggest came early, when Bec's first wool shipment to India, the ship caught fire while at sea.

"My very first wool export experience, the vessel caught on fire," she said.

Rather than stopping entirely, Bec pivoted – asking manufacturers to source Australian wool of similar specifications already within India so production could continue.

"It was a resilience-building exercise," she said.

"You've got to stop, take the emotion out and just pivot and problem solve it."

That practical mindset continues to shape the business as Bec prepares future collections and gathers feedback directly from growers and consumers.

"This year is my test-and-trial era," she said.

"I want feedback. I want people to tell me what they love, what they'd change and how we can improve it."

At the heart of the brand is also a strong focus on reconnecting consumers with fibre provenance and the people behind it.

"The whole point of the brand is creating that farmer-to-consumer connection, a circular economy," Bec said.

"They know where their wool has come from."

Bec believes consumers are increasingly looking for products with longevity, sustainability and purpose – particularly as awareness grows around synthetic fibres and landfill.

"Consumers are becoming more aware and mindful of their footprint when they purchase products" she said.

"There are now better alternatives and ZIAKE is one of them."

For Bec, the ambition extends beyond a single brand or collection. It is about creating more pathways for wool; more demand for this incredible fibre and more opportunities for growers into the future.

"This is part of the big picture," she said.

"We (all wool brands in Australia and overseas) have to collaborate and come together and make this a massive push for wool and natural fibres."

Her final message is simple.

"If you can make a difference, you must try."

MORE INFORMATION
ziake.com.au

New surfaces

A new *market* for wool

For woolgrowers, faux fur represents more than a new look. It is an additional offering that can put wool into more products and more markets, broadening the fibre's demand base across fashion, lifestyle, outdoor and performance categories.

Wool faux fur is opening new possibilities for Australian wool, creating natural, renewable textile surfaces with warmth, softness, volume and tactile appeal.

There was a time when faux fur existed purely as imitation - a substitute designed to replicate the appearance of traditional fur. That conversation is changing. Today, the opportunity is to create entirely new textile surfaces, and wool is giving manufacturers a natural, renewable fibre with which to do it.

As fashion continues to move away from traditional animal fur, brands and consumers still seek warmth, volume, softness and a sense of luxury. Wool faux fur answers that need in a different way. Rather than relying solely on synthetic fibres, it uses wool to create pile and plush fabrics with their own character, performance and material integrity. For growers, that means another reason for designers and manufacturers to specify wool – and another potential source of demand alongside wool's established uses.

From fleece to a new market

At the fibre level, wool brings qualities that synthetic faux fur cannot fully match. Its natural thermal performance, resilience, softness and moisture management can create surfaces that are voluminous yet lightweight, warm yet comfortable. Those familiar attributes of a well-grown fleece are being translated into a new generation of products.

Wool faux fur fabrics can be made through weft knitting, warp knitting, weaving or tufting, then cropped and brushed to achieve different pile effects. Inlay knitting, terry or plush knitting and sliver knitting are among the methods used to build texture and depth. The result may evoke fur or shearling, but it is a textile construction in its own right – one that expands the ways wool can deliver comfort, performance and luxury.

The distinction matters. Wool fleece is seasonally shorn and regrows naturally, year after year, through a mix of grass, sunshine and water. By applying that renewable fibre to a category often associated with synthetics, mills can offer the market a different choice while creating a fresh pathway from the farm gate to the finished product.

Innovation that builds specification

Lanificio Becagli, an Italian mill based in Prato, shows how that pathway is developing. With more than 65 years of experience producing innovative fabrics, the mill approaches wool faux fur not as a copy of another material, but as a new material experience in its own right. Its work demonstrates how machinery, construction techniques and finishing expertise can turn wool into surfaces with distinctive visual and tactile depth.

One example described by Alessandro Becagli is a double-faced wool and alpaca blend with pile on both sides. The unlined construction balances volume with lightness, softness with structure, and emotion with performance – the kind of product innovation that gives brands a new reason to put wool at the centre of a collection.

"When wool is combined with proprietary construction techniques and advanced finishing systems, it allows the creation of fabrics that are simultaneously lightweight, thermally rich, soft and structurally expressive," says Alessandro Becagli of Lanificio Becagli.

For woolgrowers, the commercial relevance is straightforward: every viable new construction adds to the range of products in which wool can be specified. As textile engineering and finishing processes advance, wool faux fur can help diversify the fibre's markets rather than asking existing categories to carry the whole demand story.

More end uses, more opportunity

The opportunity is also moving beyond high-fashion statement pieces. Wool faux fur is entering performance, outdoor and lifestyle applications, where warmth, wearability and technical capability must work together. Jackets, linings, accessories and everyday pieces can each become another point of entry for wool.

Ecofur, a textile manufacturer specialising in bionic faux fur fabrics, is one example of this shift. With more than two decades of work across outdoor applications and lifestyle wear, Ecofur uses wool across micron ranges from 18.5 to 30.5, as well as wool blends with natural and bio-based fibres. That breadth is significant: it shows a category being explored across different fibre specifications and end uses, rather than being confined to a single niche.

"As long as we continue to innovate in areas such as lightweight construction and anti-shedding performance, incorporating recycled wool blends with bio-based fibres... the potential for wool faux fur in the outdoor sports market will only grow," says Madam Chengyan Yu, General Manager and co-owner, Ecofur.

Work on lighter constructions, anti-shedding performance and fibre blends is important because it addresses the practical requirements that allow a promising material to move into wider commercial use. Each improvement can open another brief, another product and another customer for wool.

An additional demand channel

Wool faux fur is still an emerging category, and its growth will depend on continued innovation, performance and adoption by brands. Yet the direction is encouraging. Mills and manufacturers are investing in new constructions, working across a broad range of microns and taking wool into markets that extend beyond traditional apparel.

That is the real opportunity for woolgrowers. Faux fur does not need to replace an existing use of wool to be valuable; it can add to them. By giving consumers the warmth and tactile appeal they want in a natural, renewable fibre, wool faux fur creates another offering for the supply chain and another demand channel for the clip.

At the meeting point of tradition and technology, wool is not simply imitating the past. It is being engineered into something new – and every successful new surface expands the market in which wool can compete.

MORE INFORMATION
woolmark.com/wool-faux-fur

Growing wool's future: From classroom to career

Every career in the wool industry starts somewhere. It might begin in the classroom, at an agricultural show, through a school sheep program or on the family farm. Wherever that first connection is made, Australian Wool Innovation (AWI) is helping inspire the next generation through education programs that build knowledge, develop practical skills and showcase the many career opportunities Australian wool has to offer.

AWI Program Manager, Education Extension, Kelly McAvoy, said investing in education was fundamental to securing the future of Australian wool.

"It starts with education," Ms McAvoy said.

"When we invest in young people, we are investing in the future of Australian wool by building understanding, creating career pathways and inspiring the next generation of industry leaders, innovators, designers and informed consumers.

"By connecting young people with wool today, we are helping to strengthen demand, grow appreciation for our fibre and ensure Australian wool remains valued for generations to come."

From handling wool samples in the classroom to managing Merino wethers, learning wool harvesting skills, designing garments or pursuing careers across the global wool pipeline, AWI's educational resources are designed to do more than teach students about wool. They encourage curiosity, build practical skills and showcase the diverse career opportunities available throughout one of Australia's most innovative and sustainable agricultural industries.

For primary school students, the journey often begins with the Learn About Wool program.

Aligned with the Australian Curriculum, the free classroom resources help teachers bring agriculture into the classroom through hands-on learning. Resource kits include wool, yarn and fabric samples, classroom activities and lesson plans that explore everything from science and geography to sustainability, design and technology.

Rather than simply reading about fibre production, students are encouraged to touch, test and investigate wool while gaining an understanding of where it comes from, how it is produced and why it continues to play an important role as a natural, renewable fibre.

For many students, that early curiosity quickly grows into practical, hands-on learning. Among the many practical learning opportunities supported by AWI are school wether competitions, which operate across Australia's major wool-growing states. While each state delivers its own program, they all share a common goal – providing students with hands-on experience in sheep husbandry, wool production and commercial Merino management.

At Crookwell High School in New South Wales, the challenge has become an important part of the school's agricultural curriculum, with students taking responsibility for every aspect of managing their sheep, from developing feed rations and monitoring animal health to handling, crutching, foot trimming and preparing the sheep for exhibition.

Students explore wool through hands-on learning. AWI-supported education programs help build practical knowledge of sheep, wool production and the career opportunities available across the industry.

Agriculture teacher Brett Woods said the hands-on nature of the challenge gave students an appreciation for the complete production cycle.

"They get the animals at the start and then actually see the whole production process over the last five months of what it takes to raise sheep, get them through to shearing and then off to market," Mr Woods said.

Programs such as these help bridge the gap between classroom learning and commercial agriculture, giving students the confidence to apply theory in practical settings while building an understanding of Australia's sheep and wool industries.

For creatively minded students, AWI also provides opportunities through Wool4School, an international design program that challenges secondary school students to explore the versatility of Merino wool through fashion and garment design. The program encourages creativity while introducing students to the exciting career opportunities available within the textile, fashion and product development sectors.

> "By connecting young people with wool today, we are helping to strengthen demand, grow appreciation for our fibre and ensure Australian wool remains valued for generations to come."
>
> KELLY McAVOY,
> AWI PROGRAM MANAGER,
> EDUCATION EXTENSION

Education continues well beyond the school gates.

Students considering careers within the wool industry can access further learning through wool harvesting training, wool classing education, university partnerships, The Woolmark Performance Challenge and the Woolmark Learning Centre, helping develop skills across areas including shearing, wool handling, textile manufacturing, product innovation and global marketing.

Together, these initiatives demonstrate the breadth of opportunities available throughout the Australian wool industry, whether students aspire to become producers, researchers, educators, designers, marketers or skilled wool harvesting professionals.

Importantly, they also help strengthen the long-term future of Australia's wool industry. By investing in education from the earliest years through to professional development, AWI is helping ensure the industry continues to attract knowledgeable, passionate and skilled people who understand not only the value of Australian wool, but the people, science and innovation behind it.

MORE INFORMATION
learnaboutwool.com

From brand to shop floor

Getting Australian wool into a new collection is an important step. Making sure the person selling that garment understands what makes wool different can be just as important.

Across the global retail sector, Woolmark is working at both ends of that equation – collaborating with brands to put wool in front of consumers, while giving retail staff the knowledge and confidence to tell its story.

During the past financial year, Woolmark delivered training to 54 brands and 2,292 retail staff, including both shop floor and back-of-house employees. Shop floor staff represented the largest participant group – putting wool education directly into the hands of the people having conversations with consumers every day.

In Australia, training has included staff from brands including Uniqlo, Austin Group – incorporating Perri Cutten, Cable and GAZMAN – and RB Sellars.

For woolgrowers, those conversations may happen a long way from the farm, but they are an important part of building understanding and demand for the fibre they produce.

Knowledge at the point of sale

A consumer considering a wool garment might have questions about everything from comfort and performance to garment care, durability and value.

That makes the knowledge of retail staff particularly important.

Woolmark's retail education is designed to give staff an understanding of where wool comes from, what makes Merino wool unique and why designers and brands continue to choose the fibre.

It also provides practical information they can use in conversations with customers, including how to care for wool garments and how to address common questions and misconceptions about the fibre. That education is now being extended beyond face-to-face training.

From September, the Woolmark Learning Centre will offer a new one-hour short course specifically designed for shop-floor staff, making retail training available to more people, regardless of whether they can attend an in-person session.

Retail training by the numbers

54	brands trained during the past financial year
2,292	retail staff trained globally
Shop-floor staff	were the largest participant group

The course has been developed as an extension of Woolmark's face-to-face retail training and focuses on building the knowledge and confidence staff need to explain the benefits of wool products to customers.

Participants will learn about wool's origins and the qualities of Merino wool, garment care and the long-term value of wool clothing and textiles, as well as examples of the innovative ways brands are using the fibre. On completion, participants will also receive a digital Credly badge, which can be shared through their professional channels.

The aim is simple: make wool education more accessible to the people who ultimately help consumers make purchasing decisions.

Face-to-face training will continue to play an important role. Woolmark recently delivered training at the RB Sellars national retail conference, for example, providing an opportunity to engage directly with staff from across the Australian retailer's network.

Together, the face-to-face and digital approaches provide a way to extend wool knowledge through retail networks at scale.

From knowledge to collaboration

Retail education is one part of the picture. Working directly with brands to create and promote wool products is another. These collaborations help put wool into contemporary collections and categories, providing opportunities for consumers to see – and experience – the fibre in different ways.

One recent Australian example is the long-running relationship between Woolmark and **Sportscraft**, which has worked with Woolmark since 1964.

For Autumn/Winter 2026, that relationship was brought to the forefront through The Woolmark Series, evolving Sportscraft's previous "Wool Series" into a campaign that put the Woolmark name and certification more prominently in front of consumers. Sportscraft has confirmed that more than half of its AW26 range was Woolmark-certified, representing more than 180,000 units of certified product.

The campaign extended well beyond the garments themselves. The Woolmark Series was promoted through retail windows and in-store displays, paid and organic social media, email, online content and influencer activity, creating multiple opportunities for consumers to encounter wool and the Woolmark brand.

In store, the campaign included a national window takeover across 47 Sportscraft stores, supported by Woolmark Series styling, certified-wool hero pieces and wool-care messaging at point of sale. The campaign also extended into David Jones, including a hero window at its Elizabeth Street Sydney store and digital screens across its network.

Online, dedicated Woolmark content attracted more than 16,000 sessions, while 8,000 product clicks were recorded from the womenswear Wool Series page. Paid social activity generated more than 388,000 impressions and 19,500 clicks during the reporting period.

Influencer activity took the wool story beyond the traditional retail environment. A one-night trip to Bowral in the NSW Southern Highlands brought together six creators with a combined audience of almost 600,000, all styled in the AW26 Woolmark Series range. The activation generated 72 in-feed posts and stories and four long-form Reels, with paid amplification recording 82,700 impressions.

Importantly, the collaboration also translated into wool moving through the supply chain. Sportscraft has confirmed more than 37 tonnes of yarn consumption across its 2026 winter season, spanning 100% wool and wool-rich products.

The campaign's top-selling lists were also dominated by familiar wool wardrobe staples. In womenswear, Merino cable sweaters and the Joyce Merino Wool Cardigan featured strongly across both retail and online sales, while Cable Quarter Zip and Merino Quarter Zip knits were among the leading menswear products.

For Australian woolgrowers, the connection between the two activities is important.

Brand collaborations help create opportunities for wool to reach consumers. Retail education helps ensure that when those products arrive in store, the people selling them understand the fibre and can confidently communicate its benefits.

From the development of a collection to the conversation at the shop counter, each step helps build knowledge of Australian wool – and ultimately supports demand for the fibre.

Coming in September

Wool education in one hour

A new Woolmark Learning Centre short course will make retail education more accessible to shop-floor staff.

The one-hour online course covers:

- Where wool comes from and what makes Merino wool unique
- The benefits and long-term value of wool products
- Wool garment care
- Common consumer questions and misconceptions
- How innovative brands are using wool.

Participants who complete the course will receive a digital Credly badge that can be shared on their professional channels.

MORE INFORMATION
woolmarklearningcentre.com

Getting the basics right: how better weaner management is transforming Europambela

At Europambela Grazing Co, east of Walcha in northern NSW, manager Tony Overton has found that improving weaner performance has delivered benefits far beyond the young sheep themselves.

The 3,900-hectare operation runs across two properties receiving around 700 mm of predominantly summer rainfall. Its core enterprise is 7,500 self-replacing Merino ewes, based on Saxon types, with a standard reference weight (SRW) of 48 kg.

The flock has a strong ultrafine wool focus, targeting the Italian market with wool generally below 15 micron and cutting around 3.0–3.2 kg per head. Shearing takes place over six weeks from October.

For Tony, the transformation began with a simple shift in focus: measuring sheep performance and using that information to make management decisions.

A simple message with a big impact

Tony attended AWI's Winning with Weaners (WWW) for the first time in 2018 and says the take-home messages were straightforward and readily applicable to the business.

At the following weaning, Europambela began routinely weighing weaners, understanding their SRW and monitoring performance throughout the growing season. What began as a focus on young sheep soon exposed opportunities across the entire flock.

Historically, Europambela's long-term lamb marking percentage had been around 80–85%. The introduction of pregnancy scanning also gave the business a clearer picture of reproductive performance and where losses were occurring.

Today, marking percentage is sitting just under 100%, with 25–30% twins compared with only around 5% seven or eight years ago.

"For a Saxon-based sheep, people have traditionally held the belief that you cannot get that," Tony says. "You can get what you want, if you focus on it."

> "The one percenters just keep fronting up for us. I'm not chasing them – they keep showing up."
>
> TONY OVERTON, WALCHA, NSW

But reproductive performance is only part of the story.

Shifting the focus to reducing losses

One of the most significant changes has been the attention paid to survival.

When Europambela began monitoring weaner performance more closely, losses between marking and first shearing were approximately 15%. Today, that figure is below 2%.

While Tony regards the improvement as a major success, he still sees room to improve.

"That still equates to 150 lambs," he says. "I would prefer to lose none."

The result has been a change in mindset – away from simply pursuing higher production and towards identifying where productivity is being lost.

"Our focus is now, rather than focusing on production, to minimising losses," Tony says.

That has created what he describes as a 'snowball effect' through the flock.

With more lambs surviving and more replacements available, selection pressure has increased. Europambela now culls around 30% of ewe weaners while retaining sufficient replacements. The business is also able to class and remove around 20% of its adult ewes.

Improved reproductive performance and survival have therefore created considerably more flexibility within the enterprise.

Weighing provides the information to act

Another major step was investing in technology including Optiweigh, electronic scales and automatic drafting.

For Tony, being able to monitor liveweight has changed the way the business manages sheep because decisions no longer rely on occasional yard weighing or visual assessment alone.

"We don't have to guess anymore," he says. "We know where they are."

For maiden ewes, Europambela now works towards a target of condition score 3 and 42 kg liveweight at joining in May.

That provides a clear management trigger. If sheep are falling behind, action can be taken before the consequences appear in reproductive performance.

The impact has been particularly noticeable in maiden ewes. Historically, maiden lamb marking rates had been as low as 45%.

Today, scanning is around 92%, translating into marking percentages in the mid-80% range.

Tony estimates that represents an improvement of approximately 30%.

Feed budgeting and maintaining momentum

The WWW Feed Budget Table for Merino Weaners has also become an important practical management tool at Europambela.

Tony uses it to assess whether weaners are ahead of or behind their targets and determine how much supplementary feed may be required.

One important lesson has been understanding that energy and protein requirements need to be considered together.

Straight barley, for example, may not provide enough protein for rapidly growing weaners to make adequate use of the available energy.

Europambela uses dried distillers grains (DDG), providing approximately 22% protein and 12–13 megajoules of metabolisable energy (MJ ME), as a supplementary feed option.

Pasture quality remains central.

"If we don't have green, we don't have protein," Tony says, using it as a simple rule of thumb when assessing the feedbase.

The aim is to maintain weight gain rather than allowing young sheep to fall behind and then trying to recover lost performance.

Tony is also conscious of the relationship between declining weight gain, stress and parasite susceptibility. If young sheep stop moving forward, it is now a trigger to investigate why rather than simply accepting it as a seasonal outcome.

Better sheep get the best feed

Another significant change has been how feed is allocated across the business.

Historically, cattle received the best feed on the property. Today, priority is given to the young female sheep and weaners that will drive future productivity.

Europambela also runs around 500 cows, providing risk diversification and other management benefits, but the Merino enterprise is increasingly focused on production per animal rather than livestock numbers alone.

That philosophy extends to culling. Rather than relying on a single annual culling event, the business continually identifies sheep that are not meeting expectations, creating more opportunities to remove non-productive animals from the system.

It is another example of Tony's focus on finding and reducing the 'leakage' from production.

Building the sheep for the future

Europambela's longer-term breeding objective is a 14.5–15-micron ewe capable of lambing at 120% and producing a 42–45 kg lamb before cutting its teeth. Importantly, the aim is not to breed a bigger sheep.

Europambela: the gains

- **15% → below 2%**
  Losses between marking and first shearing
- **80–85% → just under 100%**
  Long-term lamb marking percentage compared with today
- **5% → 25–30%**
  Proportion of twins compared with seven or eight years ago
- **45% → mid-80%**
  Maiden lamb marking percentage
- **92%**
  Current maiden ewe scanning result
- **30%**
  Ewe weaners now culled while still retaining sufficient replacements
- **42 kg + condition score 3**
  Target for maiden ewes at joining

The approach

Weigh. Monitor. Feed to target.
Reduce losses. Use the information to act.

The flock's 48 kg SRW is considered appropriate for the environment. Instead, the focus is on improving productivity and efficiency within that frame.

The business is also broadening the traits considered in its breeding and selection program, including fat, muscle and eating quality alongside the wool characteristics that remain fundamental to the enterprise.

Resilience through better information

Tony sees Europambela's gains as the accumulation of 'one percenters' rather than the result of any single revolutionary change.

The business also reconsidered its approach to stocking rate following the 2019–20 drought. With an expectation that approximately two years in every 10 will be dry, the emphasis has shifted away from stocking rate as the primary measure of performance. Instead, the focus is production per animal – which Tony says is ultimately delivering production per hectare. For him, that is the broader value of better weaner management.

"Not one 'single thing' changed," he says. "It comes back to getting the basics right – and systems."

Weighing sheep, setting targets, monitoring growth, managing nutrition, identifying non-productive animals and improving survival have collectively created greater flexibility across the enterprise.

The benefits also extend beyond immediate production. Improved reproductive performance and survival can reduce emissions intensity by producing more output from the breeding flock.

Tony believes there is still considerable potential to uncover.

"The one percenters just keep fronting up for us," he says. "I'm not chasing them – they keep showing up."

What began with better weaner management has ultimately become a way of understanding the entire production system: measure performance, identify where losses are occurring and make management decisions early enough to do something about them.

For Europambela, getting those basics right is continuing to deliver.

Natural fibres stronger together

Australian wool and cotton have traditionally told their stories separately. But in a global textile market dominated by synthetic fibres, there is considerable value in speaking with a stronger, collective voice.

L–R: AWI Chair George Millington, Cotton Australia chair Liz Stott, Cotton Australia CEO Adam Kay, AWI CEO Bryan Fry

That was the thinking behind the inaugural Australian Natural Fibres Forum, jointly hosted by AWI through Woolmark and Cotton Australia in Sydney in April.

The event brought together almost 250 growers, researchers, supply-chain representatives and industry leaders, including representatives from major Australian and international brands such as Adidas, J.Crew, R.M.Williams, Sportscraft, MJ Bale, Alemais, RB Sellars, Cotton On Group and Rodd & Gunn.

For Australian woolgrowers, the significance was not simply the size of the gathering, but who was in the room. Bringing fibre producers together with the businesses making sourcing and product decisions provided an opportunity to discuss the issues increasingly influencing global textile markets – from fibre choice and performance to traceability, transparency and evidence of how fibres are produced.

A central message was that wool and cotton are complementary natural fibres rather than competitors. Cotton Australia CEO Adam Kay said working together gave both industries a greater opportunity to communicate the benefits of natural fibres to consumers. The forum also provided an opportunity to put Australian growers and their production systems directly into conversations with global brands and retailers.

> "Cotton and wool are not competitors but can work together to highlight the huge advantages of natural fibres for consumers."
>
> ADAM KAY,
> COTTON AUSTRALIA CEO

As sustainability expectations evolve, brands increasingly want to understand not only the fibre they are purchasing, but where it was produced, the farming systems behind it and the evidence supporting environmental and sustainability claims.

AWI CEO Bryan Fry said Australian agriculture was already operating in a market demanding greater transparency, evidence and accountability.

"That is especially relevant to natural fibres, where markets increasingly want to understand not just what a product is, but how and where it was produced," Mr Fry said.

"Australia is well placed to contribute to that global conversation with our strong agricultural capability. Leadership in this domain is about demonstrating progress, backed by science and standards over time."

Sessions during the forum examined why fibre choice matters, the increasing importance of traceability and transparency, innovation both on and off farm, and how the voices of growers can be better heard by brand customers.

Mr Kay said there was increasing awareness of the limitations of oil-based synthetic fibres and an opportunity for wool and cotton to communicate their respective natural attributes more effectively.

The forum marked the beginning of what Woolmark and Cotton Australia expect will be greater collaboration between the industries, with both organisations committed to identifying opportunities to grow demand, strengthen market access and support the long-term future of Australian natural fibres.

For woolgrowers, that is ultimately where the value of collaboration lies: ensuring Australian wool remains understood, trusted and valued by the brands and consumers choosing the fibres of the future.

From farm to fast rail: broad wool's new journey in India

An AI generated image depicts the upcoming advancements to Indian Railways. A development made possible with Australian broad wool.

For decades, broader wool has largely been discussed through the lens of traditional textile markets.

But increasingly, innovation programs are beginning to reposition broader micron wool into entirely different spaces – including transport, interiors, insulation and technical performance applications.

One of the latest examples is emerging through Indian Railways, where Australian broader wool is being used in newly developed upholstery fabric designed for next-generation rail interiors.

Developed specifically for high-speed and semi high-speed rail coaches, the upholstery velvet fabric has been engineered to meet the demanding requirements of one of the world's largest public transport networks.

Importantly, the development is centred around broader micron wool.

The fabric incorporates 30.5-micron wool blended with nylon to deliver durability, pile retention and long-term performance in high-use seating environments. The upholstery construction uses an 85 per cent wool and 15 per cent nylon yarn in a double-pile woven velvet structure, with the final upholstery composition containing approximately 58 per cent wool.

While softness has traditionally dominated discussions around wool, developments like this highlight a different set of fibre strengths – durability, resilience, breathability, moisture management and comfort over long periods of use.

Importantly, the material has also been developed to comply with stringent international rail safety standards through specialised flame-retardant back-coating technology.

And the commercial scale is significant.

According to project information, Indian Railways' ongoing passenger coach upgrades are expected to require more than one million metres of upholstery fabric over the next five years.

For Australian woolgrowers, developments like this highlight how innovation programs are increasingly focused on applications where broader wool's natural characteristics become genuine advantages.

That includes sectors such as transportation, interiors and technical textiles – industries increasingly searching for materials that can combine durability and performance with sustainability credentials.

The transportation sector is attracting growing interest as manufacturers look to reduce reliance on petroleum-based synthetic materials while maintaining strict safety standards.

Wool's natural breathability, insulation properties and renewable fibre credentials are helping attract renewed interest in these applications.

At the same time, other innovation programs are continuing to explore broader wool opportunities beyond transport.

Developments in wool wadding and insulation products are using wool in the 22.5 to 28.5 micron range – and in some cases broader – for outerwear, filling and technical insulation applications.

Unlike synthetic alternatives, wool-based filling products offer natural moisture management and breathability while still providing warmth and loft retention.

Wool faux fur is another significant category, with developments using wool fibres in the 24 to 28 micron range, and sometimes broader, to create textured fabrics aimed at reducing reliance on fully synthetic pile materials.

Collectively, these developments reflect a shift towards diversification and identifying applications where wool can offer unique technical and environmental advantages.

The opportunities may not come from a single breakthrough product.

Instead, the future for broader wool may lie across a growing portfolio of specialised applications – from transport interiors, home furnishings and commercial upholstery to insulation, performance materials and technical textiles.

And while many of these markets are still evolving, developments like the Indian Railways project demonstrate that broader wool is steadily finding new relevance well beyond its traditional boundaries.

A new road for Australian wool

Ask most consumers what a wool garment looks like and chances are they will picture a jumper, a coat or perhaps a finely tailored suit.

Bridgitte Brooks wants them to think again.

The fifth-generation Western Australian wool producer and founder of fashion label Homestead Road is using innovative OPTIM™ Merino wool fabric to create a contemporary puffer-style vest – taking Australian wool into a category more commonly dominated by synthetic fibres.

It is exactly the kind of reaction she wants when people first pick it up.

"People can't believe it's wool," Bridgitte said.

For Bridgitte, that surprise represents both the challenge and the opportunity facing the fibre she has grown up with – showing a new generation of consumers just how much Australian wool can do.

Built from the farm

For fifth-generation wool producer Bridgitte Brooks, wool is more than the fibre her family grows – it is part of her history, her livelihood and now, her future.

Growing up on her family's farm, Bridgitte spent plenty of time alongside her father in the sheep yards and always expected agriculture would become her career.

"I was always going to study ag, but there were droughts when I was in Years 11 and 12," she said.

"I ended up studying occupational therapy because I thought it was good to have something off-farm. I wanted to travel and I really like connecting with people and helping people."

But agriculture was never far away and, 15 years later, after marrying farmer Jeremy Brooks, Bridgitte found herself firmly back in the world she had grown up in.

Today Bridgitte and Jeremy farm in the Yuna area of Western Australia's Mid West, where they operate a mixed farming enterprise incorporating dryland cropping and cattle. Bridgitte also remains actively involved in her own family's farming operation, which runs around 5,000 Merino ewes across 3,200 hectares.

And then there are Ted, eight, Tessa, seven, Grace, six, and Clementine, three.

Four children in five years changed Bridgitte's life – and, unexpectedly, helped sow the seed for Homestead Road.

After becoming a mother, she became increasingly conscious of the role clothing could play in how women felt as their bodies, identities and daily lives changed.

At the same time, she could see a gap in the Merino activewear market.

At one end were highly technical performance garments. At the other were comparatively simple basics. What Bridgitte couldn't find were modern, flattering and versatile wool garments designed for women whose days rarely fit neatly into one category.

Particularly women like her.

Homestead Road grew from the idea that clothes should be able to move from task to task and day to night – reflecting the reality of busy rural women who might move between the sheep yards, school pick-up, farm office and town all over the course of a single day.

But its beginnings were considerably less glamorous.

"I literally Googled how to start your own fashion business," Bridgitte said.

She completed an online course, contacted Woolmark, reached out to established brands and started asking questions.

"I'm quite curious. I'm always happy to ask questions and to respect if people say no or they don't want to share information, and I'm very grateful when people do.

"So that's kind of how Homestead Road started."

Several years of sampling, searching for reputable manufacturers and, Bridgitte readily admits, some expensive mistakes followed before Homestead Road officially launched in March 2025.

"I'm not a fashion type. I'm not known for my style," she said.

"But I probably am known for my love of wool and the farm."

Wool for real life

That connection to wool sits at the heart of Homestead Road. The brand is built around versatility, quality, durability and sustainability, with Bridgitte determined to create timeless garments that also introduce more consumers to Australian Merino wool.

Her current collection includes leggings, jumpers, socks, caps and other pieces, designed around the realities of women's lives rather than simply the traditional fashion model.

Bridgitte is equally pragmatic about what those garments need to deliver.

If she wants a consumer accustomed to synthetic activewear to try wool leggings, for example, the wool version has to perform.

"They need to be a similar price to what people would pay for the plastic ones," she said.

"But it needs to do what the plastic ones do. It needs to hold up my mum tum and be comfortable.

"I'm 200 per cent confident once people try it, they're absolutely converted. They just need to try it first."

The same philosophy extends to fit.

Bridgitte tests her garments across different body shapes and sizes rather than designing solely around the conventional size-eight fashion model – an approach particularly evident in the development of Homestead Road's newest wool garment.

Rethinking the puffer vest

It was through Woolmark information that Bridgitte first came across OPTIM™ fabric.

She immediately saw its potential.

OPTIM™ technology allows Australian Merino wool to be used in high-performance woven fabrics suited to applications well beyond the traditional wool knit.

For Bridgitte, it represented an opportunity to create something consumers might never expect to be made from wool – a puffer-style vest.

"I thought, this is fantastic," she said.

Homestead Road founder and WA wool producer Bridgitte Brooks is challenging perceptions of what wool can do with a puffer-style vest featuring an OPTIM™ wool exterior, wool filling and cotton lining.

"I need to get onto this so that I can show people just how flexible wool is and that it can be used for lots of different things."

The Homestead Road vest uses OPTIM™ wool fabric on the exterior, wool filling and a cotton lining, creating a garment made entirely from natural fibres.

Bridgitte has also brought the Homestead Road philosophy to its design, creating a more feminine silhouette with an adjustable internal waist and vertical design lines intended to lengthen the body.

A vest also made sense because of its longevity and versatility.

"You know, a vest is timeless if you get a nice style," she said.

But perhaps her favourite attribute is what happens long after the garment has finished doing its job.

"I don't think there are many puffer vests that can return to earth once you've finished with them."

For Bridgitte, it is another opportunity to challenge assumptions about wool.

Consumers frequently associate the fibre with conventional knitwear, she said, without realising the breadth of applications now possible.

"There are so many applications. I think if we can give consumers the opportunity to see these new and different technologies and fabrications, that's going to open their eyes a lot more."

Remaining OPTIM™ fabric is already earmarked for another Homestead Road project, with Bridgitte working with a manufacturer on a sports jacket she hopes will become available next year.

She is also pursuing Woolmark certification for the vest – something she believes would give both the business and its customers additional confidence in the quality and performance of the product.

Proudly Australian wool

While Bridgitte has ambitions to grow Homestead Road into a profitable, scalable business – and perhaps one day open a flagship store – her motivation extends well beyond selling clothes.

She wants Australians to reconnect with wool.

"I want Australians to be proud and celebrate wool," she said.

For a fifth-generation wool producer, that connection is deeply personal.

Wool, she says, has helped support generations of her family and countless others across the supply chain, from the people working on-farm to those who handle, process, manufacture and ultimately sell the fibre.

It is also part of the reason she and her children have the life they do today.

"Growing up, I fostered a love of wool. I was always helping Dad in the sheep yards," she said.

Now she is watching another generation grow up with much the same freedom.

"Managing sheep is something you can do with the kids," she said.

"It's such a joy and a gift to give your kids that opportunity to grow up on the farm.

"They're in touch with nature and they know life and death. It builds resilience.

"I hope one day they look back and are grateful for that."

That desire to protect the future of family farms sits alongside Bridgitte's ambition for Homestead Road.

For her, creating demand for wool, connecting consumers with agriculture and building profitable and sustainable farm businesses are not separate conversations.

They are all part of ensuring there is something worth handing to the next generation.

And if Homestead Road can encourage a few more people to check the fibre content on a clothing label – or pick up a puffer vest and be astonished to discover it is wool – Bridgitte believes it is playing its part.

"We all do what we can in our own way."

MORE INFORMATION
homesteadroad.com.au

Resources

There are numerous resources on hand to assist producers in the challenges and daily tasks that come with growing wool – the expected, the unexpected and everything in between.

Find here a list of timely resources to keep in your toolbox. For more resources, head to AWI's Grower Menu (wool.com/menu) and AWI and MLA's Making More From Sheep (makingmorefromsheep.com.au)

Emergency resources

- Drought resources
- Bushfires – Livestock safety and recovery
- Flood Resources

Supplementary feeding

- Feeding and managing sheep in dry times
- Using lick feeders to supplementary feed ewes
- Making More From Sheep: Keep your sheep in good condition

Worms

- WormBoss
- Making More From Sheep: Worms fact sheet

Foot health

- Put your (sheep's) best foot forward
- AWI Footrot information and state resources
- Making More From Sheep: Footrot fact sheet

Pregnancy scanning

- The value of pregnancy scanning
- Ewe scanning and management checklist
- Pregnancy scanning: an ultrasound investment

Nutrition

- Ewe nutrition
- AWI Feed On Offer Library
- AWI Standard reference weight calculator
- Feedbase options

Flystrike

- FlyBoss
- It's Fly Time! Recognising and monitoring flystrike fact sheet
- It's Fly Time! Preventing and treating flystrike fact sheet
- Making More From Sheep: Management of flystrike

Get connected online to AWI

AWI offers a range of online choices for Australian woolgrowers and other stakeholders to access the latest information about AWI activities – available on their computer, tablet or smartphone.

To ensure you keep up to date with the latest information from AWI, subscribe to AWI's monthly online Woolgrower Newsletter. Visit wool.com/subscribe or use the QR code for your free subscription.

Wool.com website

Wool.com is designed specifically for Australian woolgrowers seeking information from AWI on lifting their productivity.

AWI e-newsletters

AWI produces several free e-newsletters:

- Wool Market Weekly Report, including weekly price movements and commentary
- Woolgrower Newsletter (monthly)
- Beyond the Bale e-newsletter (twice-yearly)

Visit **wool.com/subscribe** for your free subscription.

AWI social media channels

Followers at January 2026 and percentage increase during the year, were:

- 15.7K followers
- 8K followers
- 9.2K followers
- 6.4K followers
- 4.5K followers

AWI Extension Networks

AWI Extension Networks are present in each wool-growing state. They aim to increase the long-term productivity and profitability of producers. All woolgrowers are encouraged to get involved. Visit **wool.com/networks** to connect with the AWI Extension Network in your state.

The Yarn podcast

AWI's *The Yarn* podcast is the wool industry's No.1 podcast. On *The Yarn*, you can learn more about AWI's projects from the people at the cutting edge of R&D and marketing. Each episode is about 20 minutes in length. *The Yarn* can be listened to at **wool.com/podcast**, Spotify and Apple Podcasts.

Woolmark digital and social channels

AWI subsidiary Woolmark also has a range of digital channels including the **woolmark.com website, e-newsletters,** and **social media channels** through which woolgrowers and other stakeholders can view the company's marketing initiatives.

The people shaping wool's future

When we talk about the future of the Australian wool industry, it is easy to focus on markets, research, technology and changing consumer expectations. But behind all of those things are people.

That is what stands out in this edition of *Beyond the Bale*.

Across these pages are woolgrowers prepared to measure, question and change the way they do things; researchers looking for better answers; and businesses finding new ways to take Australian wool into products and markets around the world. The stories are different, but the common thread is a willingness to keep moving forward while holding onto the qualities that have long underpinned Australian wool – resilience, practicality, innovation and adaptability.

Progress can be a producer using better information to make management decisions, research delivering practical answers, new technology making measurement easier on-farm, or finding new ways for consumers to experience wool. There are challenges ahead, from seasonal conditions to shifting markets and changing expectations. But these stories reflect the values and momentum driving the industry forward.

Wool's future will ultimately be shaped by its people – those prepared to test what is possible, share what they learn and keep improving what they do.

Kristen Frost
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Although surrounded by agriculture, my journey into wool was anything but direct.

As this winding path settles, it feels a pertinent time to pause. Looking back, one thing remains clear – I owe a lot of my experiences in wool to the people in it.

My family, laying the foundations of a passion for agriculture, while encouraging me to pursue my creative skills. My grandfather and sister, for sharing the AWI Graduate Training Program with me, helping me find a way to connect these passions. The industry people I met while a Graduate – from worm management workshops in Glen Innes to fashion parades in Florence; the commitment, expertise and passion for wool's future is always clear.

Now having found my place in the AWI Communications team, I feel lucky to hopefully give back to these people, providing them information and sharing their stories. As I turn to look at the path ahead – I feel confident in wool's future because of its people.

Kate Rice
Communications Project Officer
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Use the NWD to attract the highest price

All woolgrowers are being urged to complete the National Wool Declaration (NWD), as wool sold as Not Declared usually receives a discount. The NWD provides transparency to buyers and the whole supply chain and helps woolgrowers earn premiums and avoid discounts for their wool.

The National Wool Declaration (NWD) is a simple way for woolgrowers to tell the market more about the wool they produce. By completing an NWD, growers provide information that buyers can't determine from testing alone – such as mulesing status and other management details – helping the wool move through the supply chain with fewer questions and more certainty.

When AWI engages with brands and retailers, one message comes through consistently: they want to see stronger participation in the NWD. Clear declarations give buyers confidence, support transparency across the supply chain and ensure growers receive clearer market signals about demand and pricing preferences.

Filling out an NWD is voluntary and once lodged, the information automatically flows into sale catalogues and wool test certificates. This means buyers have the details they need at the point of sale, without any extra steps for growers.

All woolgrowers are encouraged to complete an NWD, regardless of breed, wool type or management system. Taking part helps protect market access for Australian wool and ensures growers remain well positioned as customer expectations continue to evolve.

Table 1. NWD declaration rates (%) by Mulesing Status by Season

		2023–24	2024–25	2025–26 YTD
Merino	Non M.	15.3%	16.5%	18.2%
	Ceased M	3.3%	2.8%	3.6%
	Liq Nit	0.2%	0.3%	0.1%
	AA	50.9%	52.6%	54.2%
	Mulesed	9.1%	7.7%	6.5%
	Not Decl.	21.2%	20.0%	17.4%
	Total	**1,174,129**	**1,013,020**	**938,247**
Non-Merino	Non M.	45.6%	48.2%	54.2%
	Ceased M	1.5%	1.4%	2.1%
	Liq Nit	0.0%	0.0%	0.0%
	AA	12.2%	11.8%	11.9%
	Mulesed	3.4%	2.7%	2.6%
	Not Decl.	37.3%	35.9%	29.2%
	Total	**299,951**	**250,241**	**233,235**

Seasonal Trends in NWD Rates

The table highlights a continued shift toward greater use of the National Wool Declaration (NWD), with declaration rates improving across both Merino and Non-Merino wool in the 2025–26 season to date.

The data shows a continuing shift away from mulesed and undeclared wool toward non-mulesed declarations, particularly in the non-Merino clip.

For Merino wool, the non-mulesed share increased from 15.3% in 2023–24 to 18.2% in 2025–26 YTD. Ceased-mulesing declarations also rose to 3.6%, while the proportion declared as mulesed fell from 9.1% to 6.5%. The share with no mulesing declaration declined from 21.2% to 17.4%. AA remained the largest category, increasing from 50.9% to 54.2%.

The shift was stronger in non-Merino wool. Non-mulesed wool increased from 45.6% in 2023–24 to 54.2% in 2025–26 YTD, meaning it now accounts for more than half of the non-Merino clip. At the same time, wool with no declaration fell sharply from 37.3% to 29.2%. The mulesed share also declined slightly, from 3.4% to 2.6%.

Testing volumes continued to contract. Merino volumes fell from 1.013 million in 2024–25 to 938,247 in 2025–26 YTD, a decline of about 7.4%. Non-Merino volumes decreased from 250,241 to 233,235, down approximately 6.8%. Compared with 2023–24, total volumes are around 20% lower for Merino wool and 22% lower for non-Merino wool.

The figures suggest that supply-chain declarations are becoming more complete and that non-mulesed wool is gaining share, even as the total volume of wool tested continues to decline.

Table 2. State Breakdown of NWD Declaration Rates

	2023–24		2024–25		2025–26	
	Declared	Not Declared	Declared	Not Declared	Declared	Not Declared
NSW	79.2%	20.8%	81.7%	18.3%	85.3%	14.7%
Qld	83.9%	16.1%	87.8%	12.2%	87.7%	12.3%
SA	80.6%	19.4%	81.2%	18.8%	85.7%	14.3%
TAS	85.2%	14.8%	85.9%	14.1%	87.2%	12.8%
VIC	78.2%	21.8%	79.0%	21.0%	82.5%	17.5%
WA	58.5%	41.5%	55.1%	44.9%	60.2%	39.8%

State Trends in NWD Declaration Rates by Season

Declaration rates increased across most states between 2023–24 and 2025–26, indicating a broader improvement in the proportion of wool offered with a recorded mulesing status.

Queensland recorded the highest declared share in 2025–26 at 85.7%, closely followed by New South Wales at 85.3%. Tasmania and Queensland also remained high, at 87.2% and 87.7% respectively, although Queensland was broadly unchanged from the previous season. Victoria improved from 78.2% in 2023/24 to 82.5% in 2025–26.

Western Australia continued to record a substantially lower declaration rate than the other states. While its declared share improved from 55.1% in 2024–25 to 60.2% in 2025–26, almost 40% of wool remained undeclared. This compares with undeclared shares of between 12.3% and 17.5% across the eastern and southern states.

The largest improvement over the three seasons occurred in New South Wales, where the declared share rose by 6.1 percentage points, followed by South Australia with a 5.1-point increase. The data suggests declaration coverage is strengthening nationally, but the gap between Western Australia and the other states remains significant.

Table 3. Premiums and Discounts for Mulesing Status (c/kg clean) for the past three seasons (comparison with declared as Mulesed)

		Micron										
		16	17	18	19	20	21	23	25	28	29	30
Non Mulesed (NM)	2023–24	19	17	17	7	2			0	5	4	
	2024–25	25	20	9	8	5				5		
	2025–26			**70**	**60**	**52**	**40**	**40**	**45**			**75**
Ceased Mulesing (CM)	2023–24			9	5	2	1					
	2024–25		20	8	6	2				2		
	2025–26			**52**	**45**	**33**	**23**	**25**	**30**			**50**
Mulesed with Analgesic &/or Anaesthetic (AA)	2023–24			8	5	2	1		0	4	4	
	2024–25	8	7	7	6	2				2	2	
	2025–26			**1**	**2**	**1**						

Source: AWEX

Premiums

Premiums for wool declared as non-mulesed (NM) and ceased-mulesed (CM) increased substantially in 2025–26, particularly across the key 18–20 micron range. NM premiums reached 70 cents/kg clean at 18 micron, 60 cents at 19 micron and 52 cents at 20 micron, compared with 9, 8 and 5 cents respectively in 2024–25. NM premiums also remained strong at broader microns, including 40 cents at both 21 and 23 micron, 45 cents at 25 micron and 75 cents at 30 micron.

CM wool followed the same pattern, although premiums were consistently below NM levels. In 2025–26, CM premiums averaged 52 cents at 18 micron, 45 cents at 19 micron and 33 cents at 20 micron. Premiums of 23 to 30 cents were also recorded across 21–25 micron, with 50 cents at 30 micron.

AA wool attracted little additional value in 2025–26, with available premiums of only 1–2 cents across 18–20 micron. The results show a clear price distinction between NM, CM and AA declarations, with NM attracting the strongest premiums across the available micron categories.

Don't let your Declaration be wasted!

If you don't **sign and date** your NWD, the Mulesing Status of your mobs/lines of wool will not be shown on the sale catalogue and test certificate. This can reduce the number of buyers bidding on your wool, as well as the price you receive.

To ensure the Mulesing Status of your wool is known by potential buyers *prior to sale*, **sign and date the NWD.**

It is good practice for owner/managers to talk to the wool classer at the start of shearing to detail all mobs and to sign/date the declaration. Note, **eSpecis can be electronically signed.**

For further advice on achieving Premiums for your wool, contact your wool broker.

‘World of wool’ photo gallery

Have you got any interesting photos that you’d like to share with other readers of *Beyond the Bale?*
If so, please email the image and a brief description to AWI Communications Officer, Kate Rice, at kate.rice@wool.com

A lasting legacy

This special image capturing three generations working side by side was shared by Georgia Honan. In the shed of their family property *North Benalla* (Hallett, SA), Georgia stands alongside her father Craig *(left)* and Grandpa John *(right)*. John has sadly since passed away, and photos like this serve as precious reminders of many happy memories on the farm together. Georgia and her dad still work together today, carrying on the legacy.

Ready-made bed in the shed

A visit to the shearing shed can really take it out of you! Little Alyssa stopped by *‘Glenview’* (Wongan Hills, WA) shearing shed to visit her grandparents. Despite 3000 noisy Merinos in the yards and shed, Alyssa found the perfect place to get some shut eye with her grandmother Mary Siegert capturing the moment.

Pete the sheep

Alison Rosewarne shared this moment between friends, captured by Erin Rutledge as Pete the sheep said hello to Stephen Rutledge during a day in the paddock at *Conargo* (Woodstock, NSW). It was noted that Pete, once a shy little poddy lamb, is now a much-loved character and favourite with the B&B guests that visit *Conargo Cottage.*

50 years in the business

An achievement 50 years in the making, Coolamon (NSW) woolgrower and classer, Patrick O'Brien recently received recognition from AWEX for his commitment to wool classing. A proud moment for the O'Brien family, Patrick's son shared this photo of Patrick after receiving his 50 Year Classing Stencil in the mail.

Like mother, like daughter

At just four years old, young woolgrower Peggy has spent many hours in the yards with her Grandparents Greg and Kaye Potter and mother Sam.

During pre-lambing treatments at *Fairview Polwarths* (Barongarook, VIC) Peggy was found inspecting the ewe's wool, just as she's seen her mother and grandpa do many times before.

For the head and the heart

At *Kia Ora Merino* (Winslow, VIC), wool is at the heart of it all – and the head! Susan Finnigan snapped this image as she was greeted by an inquisitive mob of their Merino ewes. The fine wool of these ewes is also used by Susan to create felted hats. All 100% wool, Susan crafts the hats by hand on special order. Pictured are two of Susan's hats dyed botanically with eucalyptus leaves.

SPRING 2026 EDITION
PUBLISHED SEPTEMBER 2026

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Beyond the Bale is published by Australian Wool Innovation Ltd (AWI), a company funded by Australian woolgrowers and the Australian Government.

ISSN
1447-9680

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