WTIN Wool Market Report

Wool Market Report Summary
23 August 2019

Wool			
Australia			
AWEX EMI (cents/kg)			
	21-Aug	15-Aug	change
A$	1,497	1,513	-1.06%
US$	1,015	1,026	-1.07%
South Africa			
Cape Wools Merino Indicator (cents/kg)			
	05-Jun	29-May	change
Rand	20,607	20,598	0.04%
US$	1,401	1,391	0.72%
New Zealand			
NZ Wool Services Indicators	Coarse Crossbred (cents/kg)		
	22-Aug	15-Aug	change
NZ$	276	278	-0.72%
US$	177	179	-1.12%
United Kingdom			
British Wool Fleece Indicator (clean)			
	13-Aug	23-Jul	change
pence/kg	142	149	-4.43%
US cents/kg	173	186	-7.20%

Dates shown represent the latest auction in each country versus week-earlier result.
Sources: Australian Wool Exchange, Cape Wools SA, NZ Wool Services International, British Wool Marketing Board.

Australia



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New Zealand



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South Africa



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Americas



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United Kingdom



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Next Sales

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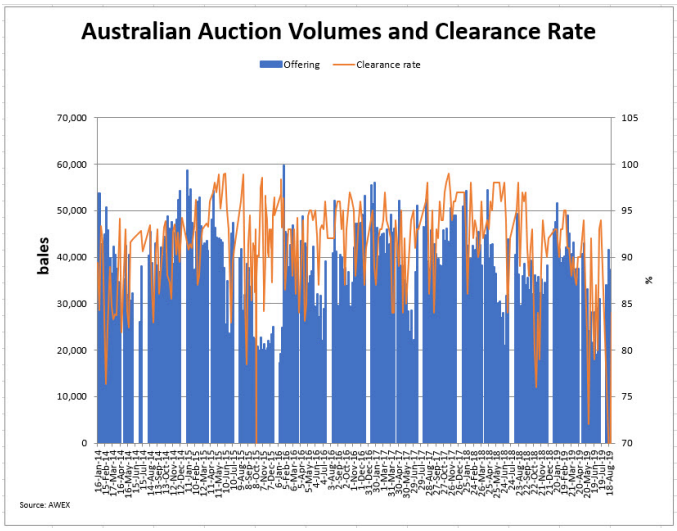
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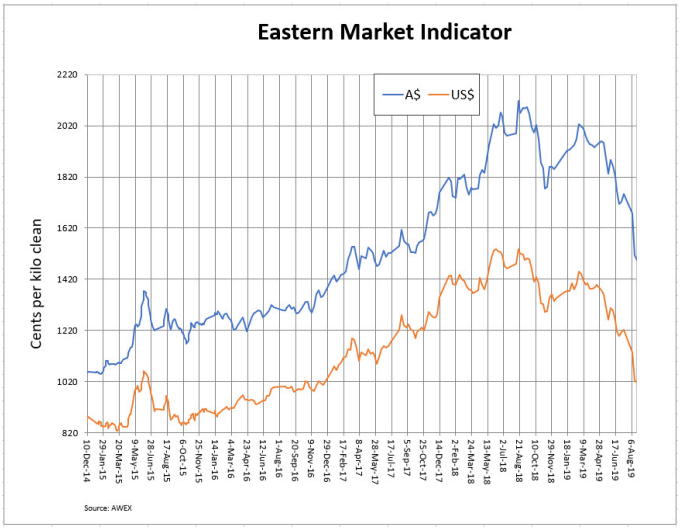
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AUSTRALIA

Softer fall in wool prices amid lower offering





The Australian wool market witnessed another week of price falls this week as sales resumed in Sydney and Melbourne. However, it was a much steadier week on the back of increased business activity. The national clearance rate was 84% as against 64% in the previous week, although total bales offered were also less at 26,492 bales.

The EMI lost just 16 cents to finish the week at 1,497 Aus cents a kg clean. In US dollar terms, the EMI lost 1.1%, or 11 US cents, at 1,015 US cents a kg clean. On Tuesday, the EMI moderated 5 cents to 1,508 Aus cents a kg clean and was down 3 cents at 1,023 US cents a kg. On Wednesday, the EMI slid to 11 cents to 1,497 Aus cents a kg and declined by 8 cents in US dollar terms to 1,015 cents a kg.

Buyers sought out lots with better style and favourable additional measurements as well as non-mulesed wool, with the former holding their ground and the latter attracting significant premiums. Poorer style lots with low strength and high midbreaks could not capture or maintain buyer interest and lost between 50 to 80 cents for the week which pushed all Merino Price Guides (MPGs) lower. Crossbred lots were the only market segment to gain ground this week, while the skirting and oddment markets trended lower.

The AWEX reported the total value of the wool sold at Aus$36.99m, taking the season total to Aus$241.01m.

In Sydney, Tuesday's sale saw all microns down from last week's level. Best style wools were again in low supply, with finer lots (<18.5 µm) carrying favourable additional measurements tending to hold their ground. Further price falls were seen on Wednesday. Merino skirtings gained on Tuesday and further on Wednesday. Crossbred lots were up for the week. All oddment types lost ground on Tuesday with lower style carbonising lots most affected. Further price falls occurred among the oddment selection on Wednesday with locks losing significantly. The Northern Regional Indicator lost 17 cents to 1,521 Aus cents a kg clean with a clearance rate at 86%, as against 65% in the previous sale on 8 August.

In Melbourne, Tuesday's sale saw 18.5 µm and finer microns lose while 19 to 21 µm types edged down marginally. On Wednesday, the merino fleece market fluctuated, with early gains eroded by increased quantities of lots with low yields. Non-mulesed lots continued to attract the attention of buyers and tended to hold their value. Merino skirtings eased on Wednesday, particularly those with >5% VM, but tended to strengthen somewhat later. The crossbred market recorded gains on both sale days. Significant discounts were applied across all microns and descriptions of oddments on Wednesday. The Southern Regional Indicator fell 21 cents to 1,477 Aus cents a kg clean with a clearance rate of 83%, as against 70% in the previous week.

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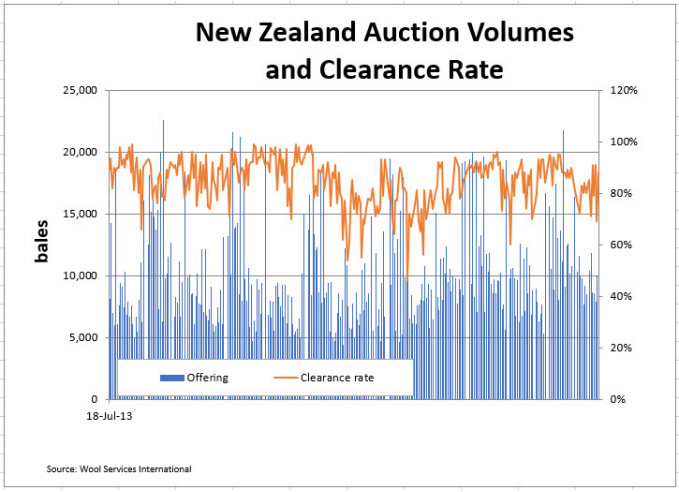
Fremantle's sale was in recess this week.

Physical demand for raw wool products has dropped suddenly and has been a major concern behind the lack of confidence in the market. A small percentage of the US dollar fall can be attributed firmly to the devalued Chinese yuan.

Next week's sales will occur in all three selling centres with 33,046 bales currently rostered for sale.

NEW ZEALAND

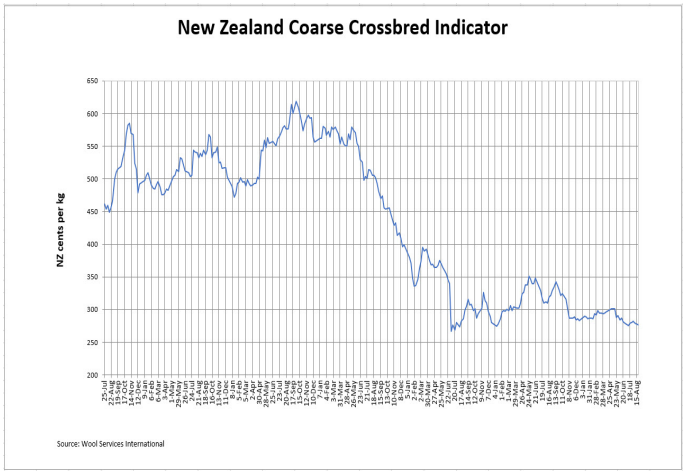
Average styles cheaper while good styles gain



The wool sale held on 22 August in North Island largely saw quality wool in demand and good styles dearer. The market had 7,281 bales on offer, of which 6,310 bales were sold, posting a clearance rate of 88% as against 69% in the previous sale.

Prices edged down both in domestic currency terms as well as in US dollar terms. The coarse crossbred indicator was at 276 NZD cents, down 0.7% or 2 cents, while in US dollar terms it fell 1.7% or 2 US cents to 177 US cents.

The selection consisted of 10% good/average colour fleece, 35.0 to 40.0 micron, 60% good style second shear 31.0 to 38.0 microns, bulk 75 mm, 15% associated oddments and 15% miscellaneous types. The main competition came from Europe and the UK, with support from China, India and



Australasian carpet mills.

Major buyers were NZWSI/JSB (2,405), Masurel (1,600) and Furhman (1,000) this week, among others.

Price movements in North Island compared to the North Island sale on 8 August were as follows: Fine crossbred second shear of 32-36 microns: good style lots were 2-4% cheaper, while fine crossbred early shorn of good and average styles were 2-3% cheaper. Coarse crossbred fleece of good styles were firm, average lots were 2% dearer while poor styles were also 1-2% cheaper. Coarse crossbred early shorn and second shear types of 37-39 microns: good colour styles 2/3 and 2/4 inch were firm, good colour styles 3/4 and 3/5 inch were down 1-2%, average styles were 2-3% cheaper and poor styles were 1-2% cheaper. Crossbred oddments for clothing: good and average styles were 2-4% dearer, poor style were in buyers' favour, and combing lots were 1-2% dearer.

The next sale will be held on 29 August in South Island with approximately 10,500 bales on offer.

Source: Wool Services International

AUSTRALIA

AWEX REGIONAL INDICATORS

Australian cents/kg, clean, Schlumberger dry.					
Region		Aug 21	Aug 20	Aug 15	Aug 14
Northern	Sydney	1,521	1,530	1,538	1,575
Southern	Melbourne	1,477	1,494	1,468	1,554
Western	Fremantle	-	-	1,598	1,666
Eastern Market Indicator (EMI)		1,497	1,508	1,513	1,564

	Season 2017/18			Season 2018/19			
	Opening	High	Low	Opening	High	Low	Year ago
Northern	1,593	2,163	1,588	2,026	2,163	1,521	2,117
Southern	1,480	2,063	1,471	1,975	2,087	1,468	2,037
Western	1,561	2,270	1,561	2,154	2,270	1,598	-
Eastern	1,524	2,101	1,519	1,994	2,116	1,497	2,068

AWEX REGIONAL MICRON PRICE GUIDES

Australian cents/kg, clean, Schlumberger dry.

Northern Region - (Sydney)				
Micron	Aug 21	Aug 20	Aug 15	Aug 14
16.5	1,978	2,003	2,020	2,040
17	1,952	1,975	2,000	2,020
17.5	1,927	1,953	1,973	1,992
18	1,888	1,913	1,932	1,950
18.5	1,824	1,843	1,869	1,884
19	1,728	1,737	1,766	1,801
19.5	1,689	1,699	1,715	1,794
20	1,683	1,694	1,711	1,791
21	1,667n	1,676n	1,695n	1,776n
22	-	-	-	-
23	-	-	-	-
24	-	-	-	-
25	-	-	-	-
26	-	1,170n	1,150n	1,220n
28	870n	850n	835n	835n
30	710n	-	-	-
32	-	-	-	-
MC	895n	956n	993	1,013

Southern Region - (Melbourne)				
Micron	Aug 21	Aug 20	Aug 15	Aug 14
16.5	1,928n	1,948n	1,973n	2,026n
17	1,923	1,943	1,963	2,013
17.5	1,904	1,928	1,962	1,988
18	1,860	1,893	1,923	1,932
18.5	1,787	1,824	1,858	1,871
19	1,734	1,748	1,753	1,813
19.5	1,692	1,706	1,713	1,802
20	1,681	1,697	1,698	1,797
21	1,675	1,693	1,694	1,759
22	1,675n	1,693n	1,693	1,759n
23	-	-	-	-
24	-	-	-	-
25	-	-	-	-
26	-	1,148n	-	1,213n
28	830	855	830	840
30	659n	701	659n	679n
32	-	469n	-	-
MC	1,020n	930n	1,020n	1,043n

Western Region - (Fremantle)				
Micron	Aug 21	Aug 20	Aug 15	Aug 14
16.5	-	-	-	-
17	-	-	-	-
17.5	-	-	-	-
18	-	-	1,717n	1,771n
18.5	-	-	1,709n	1,764n
19	-	-	1,670n	1,759n
19.5	-	-	1,658n	1,754n
20	-	-	1,648n	1,746n
21	-	-	1,648n	1,743n
22	-	-	-	-
23	-	-	-	-
24	-	-	-	-
25	-	-	-	-
26	-	-	-	-
28	-	-	-	-
30	-	-	-	-
32	-	-	-	-
MC	-	-	1,044n	1,068n

SOURCE: AUSTRALIAN WOOL EXCHANGE (AWEX)

NEW ZEALAND

NEW ZEALAND WOOL SERVICES INDICATORS

NZ cents per kg, clean					
	Merino	Mid Micron	Fine Xbred	Coarse Xbred	Lamb
Week 49 06/06/19	N/A	N/A	N/A	284	N/A
Week 50 20/06/19	N/A	N/A	N/A	287	N/A
Week 51 27/06/19	N/A	N/A	N/A	281	N/A
Week 02 11/07/19	N/A	N/A	N/A	275	N/A
Week 04 25/07/19	N/A	N/A	N/A	280	N/A
Week 05 01/08/19	N/A	N/A	N/A	282	N/A
Week 06 08/08/19	N/A	N/A	N/A	279	N/A
Week 07 15/08/19	N/A	N/A	N/A	278	N/A
Week 08 22/08/19	N/A	N/A	N/A	276	N/A

SOURCE: NEW ZEALAND WOOL SERVICES INTERNATIONAL

SCHNEIDER FINE WOOL INDEXES

Each Index represents a market quotation, based on Australian dollars,for a selected range of types. The Indexes are not price expressions.

Micron	22-Aug	15-Aug	11-Jul
15	2,420	2,342	2,421
16	2,149	2,029	2,153
17	2,090	1,940	2,122
18	2,032	1,859	2,065
19	1,916	1,793	2,007

SOURCE: SCHNEIDER GROUP

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UNITED KINGDOM

BRITISH QUOTATIONS FOR TOPS

GB PENCE/KG						
Old Quality	Mic/Lgt	22-Aug	15-Aug	08-Aug	3 months ago	Year ago
Merino/fine crossbred						
120's	17.5	1450	1480	1685	1620	2030
110's	18.0	1405	1435	1605	1550	1880
80's	19	1340	1360	1455	1420	1680
70's super	21/70	1280	1300	1385	1325	1530
70's blended	21/65	1260	1280	1360	1305	1520
66's	22	1270	1280	1355	1305	1520
64's super	23/68	1265	1270	1350	1300	1505
64's blended	23/64	1105	1110	1260	1210	1380
60's super	25	945	945	1075	1010	1175
60's blended	25.5	870	870	985	920	1020
58's super	27.5	755	740	965	820	805
58's blended	28	580	565	665	610	595
Crossbred						
56's (Australian)	29.5	540	545	620	575	510
56's super	29.5	455	460	510	470	480
54's	31	470	475	485	445	450
50's	34	455	460	470	435	430
£/US$ rate		1.22	1.21	1.10	1.27	1.28
British crossbred						
31.5 English		315	315	315	320	315
33/34 English		280	280	280	285	280

BRADFORD AUCTION PRICES IN GB PENCE/KG

N.Q. = NO QUOTE				
GRADE DESCRIPTION	July 23	July 2	May 21	Apr 24
FINE EWES No1	110	112	112	121
FINE EWES No2	95	100	99	98
ROMNEY EWES No1	127	145	119	129
ROMNEY EWES No2	120	125	116	120
MEDIUM HOGS No1	195	195	205	NQ
MEDIUM HOGS No2	116	120	132	118
MEDIUM EWES No1	124	128	135	129
MEDIUM EWES No2	112	118	119	115
MULE EWES NO. 1	118	124	122	114
MULE EWES NO. 2	112	NQ	124	122
CHEVIOT EWES No1	NQ	135	NQ	126
CHEVIOT EWES No2	NQ	116	129	121
FINE RADNOR EWES No1	115	NQ	123	NQ
FINE RADNOR EWES No2	105	108	105	108
WELSH No1	NQ	70	70	72
WELSH No2	53	56	61	62
SWALEDALE No1	53	56	60	59
SWALEDALE GREY	45	48	51	52
BLACKFACE MEDIUM No1	89	91	100	93
BLACKFACE COTTS	71	76	78	70
BRITISH FLEECE INDICATOR P/KG				
British Wool Price Index	1.49	1.54	1.56	1.56
Greasy	110	172	99	99
Clean	162	115	152	152
SOURCE: BRITISH WOOL MARKETING BOARD				

SPECIALITY FIBRES

SPECIALITY FIBRES - QUOTATIONS FOR ALL THE FOLLOWING FIBRES AND TOPS ARE AVERAGE PRICES IN US$ PER KG, FOB				
	22-Aug	15-Aug	8-Aug	01-Aug
Chinese cashmere (dehaired)				
White				
Hosiery 38mm	129.00	129.00	129.00	129.00
Weaving 32mm	117.00	117.00	117.00	117.00
Brown				
Hosiery 38mm	121.00	121.00	121.00	121.00
Weaving 32mm	112.00	112.00	112.00	112.00
Mongolian cashmere (dehaired)				
Brown	99.00	99.00	99.00	100.00
Light Grey	100.00	100.00	100.00	101.00
Afghan/Iranian cashmere (dehaired)				
White	100.00	100.00	101.00	102.00
Fawn	99.00	99.00	100.00	101.00
Dark Brown	100.00	100.00	100.00	101.00
Cape mohair tops				
Adult 37 microns	26.00	26.00	28.00	28.00
Young goat 33 microns	30.00	30.00	32.00	32.00
Super young goat 31 microns	37.50	37.50	38.00	38.00
Kid 28 microns	52.00	52.00	54.00	54.00
Kid 25 microns	54.00	54.00	56.00	56.00
Alpaca tops				
White Baby (BL)	25.50	25.00	26.00	26.00
Fine spinning (FS)	23.00	23.00	24.00	24.00
Adult (AG)	17.00	17.00	17.50	17.50
Angora				
Super quality	34.00	34.00	34.00	35.00
1st quality	30.00	30.00	30.00	31.00
2nd quality	28.00	28.00	28.00	29.00
3rd quality	26.50	26.50	26.50	37.50
4th quality	24.50	24.50	24.50	25.50
Off	23.50	23.50	23.50	24.50
Camel-hair (dehaired)				
Super baby	40.00	40.00	41.00	42.00
Medium baby	35.00	35.00	36.00	37.00
Adult	27.00	27.00	28.00	29.00
Yak-hair (dehaired)				
Super	54.00	56.00	57.00	58.00
Medium	35.00	37.00	38.00	39.00
Silk				
Mulberry sliver	43.00	43.00	43.00	43.00
Mulberry noil	16.50	16.50	16.50	16.50
Tussah sliver	33.50	33.50	33.50	33.50
Tussah noil	16.00	16.00	16.00	16.00
SOURCE: SEAL INTERNATIONAL				

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SOUTH AFRICA

CAPE WOOLS OVERALL MERINO INDICATOR

SA CENTS/KG. CLEAN						
June 4 - 5	May 28 - 29	% change	2018/19 Season		2018/19 Average to date	2017/18 Average to date
			high	low		
20,607	20,598	0.0%	25,382	17,264	21,790	18,604

CAPE WOOLS FLEECE WOOL PRICES

SPINNERS AND GOOD TOPMAKING STYLES, AWEX TYPES MF4 AND MF5. FIBRE LENGTH MEASUREMENTS IN MILLIMETRES.							June 4 - 5		
Micron	100+	90	80	70	60	50	40	30	20
18.0	-	-	-	22784	20540	19990	17074	-	-
18.5	-	-	23887	23177	21143	19704	16707	-	-
19.0	-	-	23067	22537	20725	19359	15836	-	-
19.5	-	-	22688	22120	20607	19499	15748	-	-
20.0	-	-	22300	21735	20184	19222	15408	-	-
20.5	-	-	22335	21527	20257	18602	14892	-	-
21.0	-	-	22430	21576	20372	19131	15239	-	-
21.5	-	-	-	21442	20156	19121	14531	-	-
22.0	-	-	22254	21658	20607	18299	-	-	-
22.5	-	-	21812	21622	19965	19195	-	-	-
23.0	-	-	-	21607	19999	-	-	-	-
23.5	-	-	-	21663	20861	-	-	-	-
24.0	-	-	-	-	-	-	-	-	-

SOURCE: CAPE WOOLS.

SOUTH AFRICAN MOHAIR

MOHAIR AUCTION RESULT			AUG 13
	Bales sold	Nett Mass	Av. price (rand/kg)
Kids			
Long (A/B) Summer			
Long (A/B) Winter	13	1,696.1	410.02
Medium (C) Summer	2	235.0	480.50
Medium (C) Winter	36	4,537.3	435.22
Short (D) Summer	2	233.0	447.51
Short (D) Winter	26	2,919.4	417.93
Washing (E) Summer			
Washing (E) Winter	1	170.0	180.00
Seady/Stain and Locks	12	1,683.6	166.47
Summer total	**4**	**468.0**	**464.08**
Winter Total	**76**	**9,322.8**	**464.08**
Young Goats			
Long (A/B) Summer			
Long (A/B) Winter	10	1,505.9	303.15
Medium (C) Summer			
Medium (C) Winter	38	5,151.3	312.85
Short (D) Summer			
Short (D) Winter	15	1,839.2	309.63
Washing (E) Summer			
Washing (E) Winter	2	292.0	156.90
Seady/Stain and Locks	7	905.7	174.05
Summer total			
Winter Total	**65**	**8,788.4**	**305.33**
Adults			
Long (A/B) Fine	9	1,231.8	248.07
Long (A/B) Strong	5	787.0	230.00
Medium (C) Fine	78	10,088.0	254.67
Medium (C) Strong	15	2,048.4	226.87
Short (D) Fine	31	3,941.7	238.15
Short (D) Strong	20	2,696.3	219.09
Washing (E) Fine	7	914.3	187.62
Washing (E) Strong	5	606.0	183.48
Seady/Stain and Locks	90	12,535.8	131.10
Fine total	**125**	**16,175.8**	**246.35**
Strong Total	**45**	**6,137.7**	**219.57**

SOURCE: MOHAIR SOUTH AFRICA

EXCHANGE RATES

	€	£	US $	A $	£ 3 Mths ago	£ Year ago
US $	1.11	1.22		0.68	1.26	1.40
£	0.91		0.82	0.56		
€		1.10	0.90	0.61	1.11	1.14
A $	1.64	1.80	1.48		1.75	1.83
NZ $	1.74	1.91	1.57	1.06	1.84	1.94
SA Rand	16.84	18.49	15.20	10.29	17.92	16.61
¥	118.01	129.61	106.51	72.12	143.66	149.11
Index	110.80	122.50	98.35	67.60	92.53	79.95

NEXT SALES

28-29 August	**Sydney (8,158)**
28-29 August	**Melbourne (14,778)**
28-29 August	**Fremantle (10,110)**
29 August	**Christchurch (10,500 bales)**
3 September	**Bradford (NA)**
NA	**Port Elizabeth (NA)**

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