WOOL MARKET WEEKLY SUMMARY

Sale 52: Thursday 25th June 2026

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2025/26 Aust. Wool offering		**Weekly currency movements**		
Bales offered	26,179	AUD:USD	**0.6905**	**-2.24%**
Clearance rate %	83.4%	AUD:CNY	4.7024	-1.41%
Bales sold	**21,822**	AUD:EUR	0.6081	+0.03%
Bales sold season	1,402,559	RBA close rates 24th June 2026		

AWI Market Commentary

The Australian wool market eased in the final week of the 2025/26 season. The EMI falling by 46 cents to 1,943 ac/kg, while in USD returns it fell 63 cents to end the season on 1,342 usc/kg. A similar story in the western sale rooms with a decline of 41 cents for the WMI easing to 2,129 ac/kg and in USD terms 1,470 a fall of 63 usc/kg.

Across the catalogue this week saw fine Merino types (16.5–19µm) come under heavy pressure, easing 70–75 cents across the selling centres. Medium Merinos (19.5–21µm) also recorded significant losses of 65–70 cents, although the declines were slightly less severe than those in the finer microns. In contrast, crossbreds (25–32µm) continued to attract buyer support, lifting 15–20 cents, while Merino cardings eased 10–15 cents. The week again highlighted the divergence between the Merino and crossbred sectors, with broader wool types outperforming the finer Merino market.

This week's sale saw buyers become more price-sensitive following several weeks of strong market gains. Sellers, however, remained reluctant to accept lower bids, with the clearance rate easing to 83.4%. Rather than signalling a widespread deterioration in demand, the week's result pointed to buyers reassessing value after an extended period of strong price appreciation.

However, the broader context of the 2025/26 season should not be overlooked. Despite this week's softer result, the Eastern Market Indicator finished the season 61% (736 ac) higher, while in US dollar terms it gained 557 usc (71%). Although auction offerings were 3.4% lower than the previous season, the total value of wool sold through the auction system increased by $675 million, highlighting the strength of the market over the past 12 months.

The opening week of the 26/27 season will see 33,489 bales offered, Fremantle selling on Wednesday while Sydney and Melbourne will sell on Wednesday-Thursday roster.

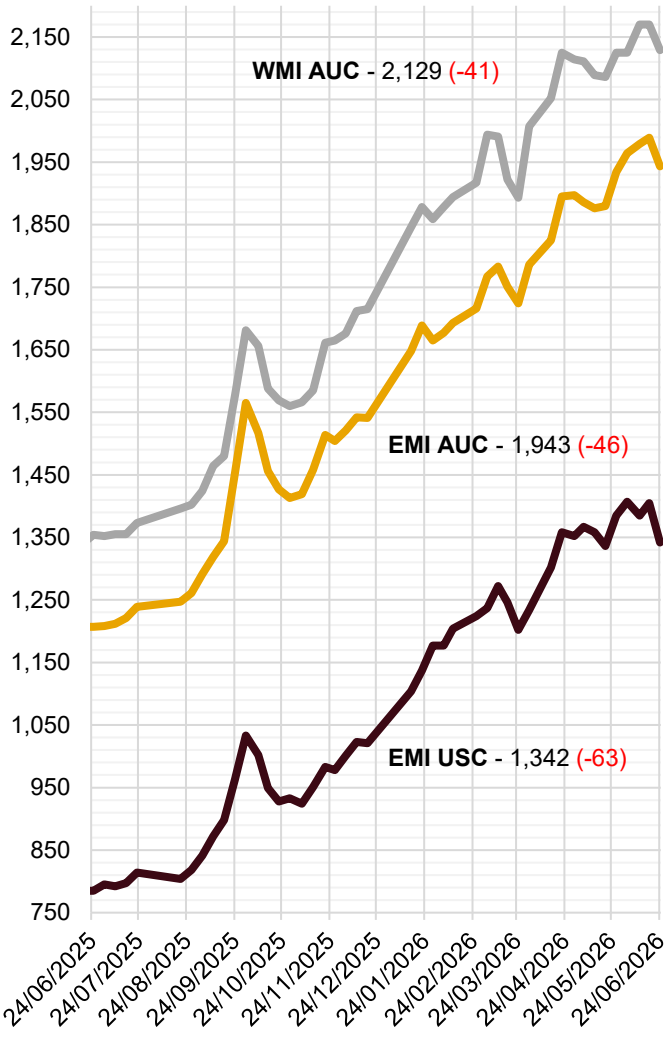
Scheduled Australian wool at auction offerings

Sale week	**2026/27 est.**	**2025/26 actual**
Week 1	**33,489 bales**	27,716 bales
Week 2	**26,784 bales**	29,275 bales
Week 3	**26,000 bales***	23,623 bales

Eastern Market Indicator (EMI)			
AUD	1,943 ac/kg	**-46 ac/kg**	**-2.31%**
USD	1,342 usc/kg	-63 usc/kg	-4.50%
CNY	91.37 ¥/kg	-3.50 ¥/kg	-3.69%
EUR	11.82 €/kg	-0.28 €/kg	-2.28%

Western Market Indicator (WMI)			
AUD	**2,129 ac/kg**	**-41 ac/kg**	**-1.89%**
USD	1,470 usc/kg	-63 usc/kg	-4.08%

12 month Market Indicators 24 June 2026



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