WOOL MARKET WEEKLY SUMMARY

Sale 03: Thursday 16th July 2026

AWI Woolgrower Newsletter dropping second Saturday of the month. **Subscribe now at wool.com/subscribe**

2025/26 Aust. Wool offering	
Bales offered	21,230
Clearance rate %	91.5%
Bales sold	**19,415**
Bales sold season	73,528

Weekly currency movements		
AUD:USD	**0.6988**	**+0.68%**
AUD:CNY	4.7289	+0.21%
AUD:EUR	0.6108	+0.46%
RBA close rates 15 July 2026		

Eastern Market Indicator (EMI)			
AUD	1,901 ac/kg	**-8 ac/kg**	**-0.42%**
USD	1,328 usc/kg	+3 usc/kg	+0.26%
CNY	89.90 ¥/kg	-0.19 ¥/kg	-0.21%
EUR	11.61 €/kg	NC	NC

Western Market Indicator (WMI)	
AUD	**No Sale**
USD	No Sale

AWI Market Commentary

The Australian wool market edged lower in the third selling week of the 2026/27 season, with only Sydney and Melbourne operating and no sale held in Fremantle. The national offering fell by 7,730 bales to 21,230 bales, helping limit the overall decline. The EMI closed 8 cents lower at 1,901 A¢/kg, while a firmer Australian dollar lifted the US-dollar indicator by 3 cents to 1,328 US¢/kg. The passed-in rate rose to 8.5%, pointing to some seller resistance despite the relatively small movement in prices.

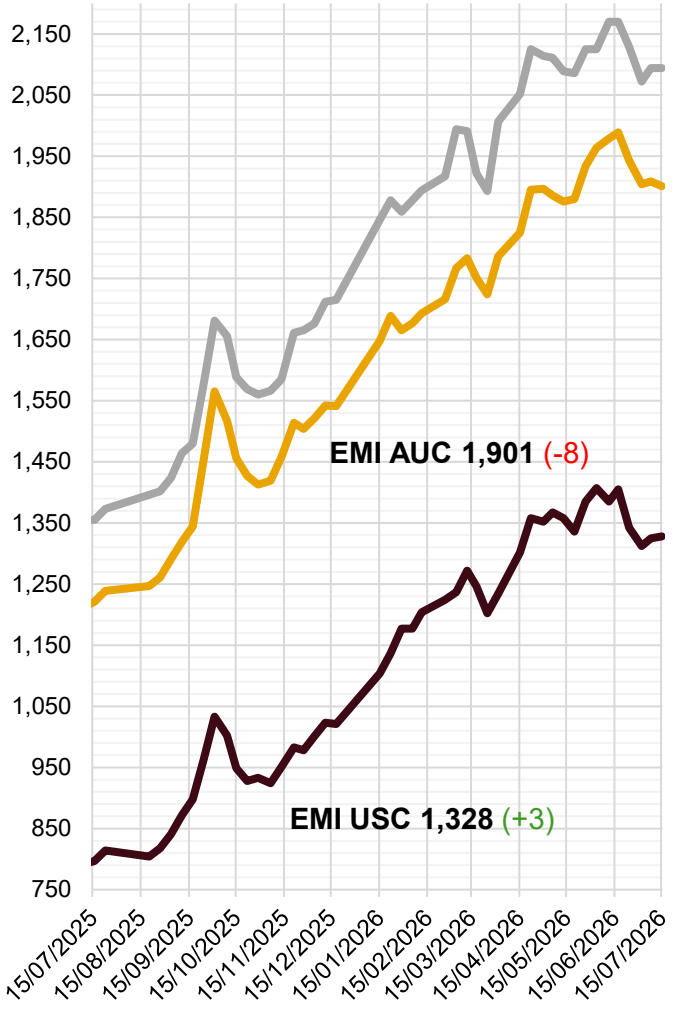
Fine Merino results were mixed across the two selling centres. The finer end of the market generally eased, while selected 18 to 19 micron types in Sydney recorded modest gains. Medium Merinos were mostly steady to slightly softer. Crossbreds also lost ground, particularly in Melbourne, while Merino cardings declined in both centres.

The uneven result suggests the market remains selective rather than broadly weak. Better-measured, well-prepared wool continued to attract support, while lower-specification lots faced greater price pressure. With the EMI holding close to 1,900 cents, the market appears to be consolidating near current levels, although buyer confidence remains sensitive to the quality and volume of wool available.

The relatively even spread of purchases among the leading Merino buyers suggests demand was not dependent on a single dominant operator, although competition remained disciplined. With no Western sale and a much smaller national catalogue, this week's stability should be viewed cautiously, as the result may reflect reduced supply as much as improved demand.

Next week will provide a stronger test of market support ahead of the three-week mid-year recess, with 32,397 bales currently forecast nationally. With Fremantle on Tuesday, Melbourne and Sydney across Tuesday and Wednesday. The return of all three selling centres and the larger offering should give a clearer indication of whether buyers are prepared to maintain current price levels.

12 month Market Indicators 15th July 2026



Scheduled Australian wool at auction offerings

Sale week	**2026/27 est.**	**2025/26 actual**
Week 4	**32,397 bales**	38,044 bales
Week 5	**RECESS**	N/A bales
Week 6	**RECESS**	N/A bales

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