

# THE AUSTRALIAN WOOL SUPPLY CHAIN



Over 65.9 million sheep<sup>1</sup>

Over 80,000 woolgrowers

More than 1.7 million bales sold<sup>2</sup>

85% of Australian wool goes to China

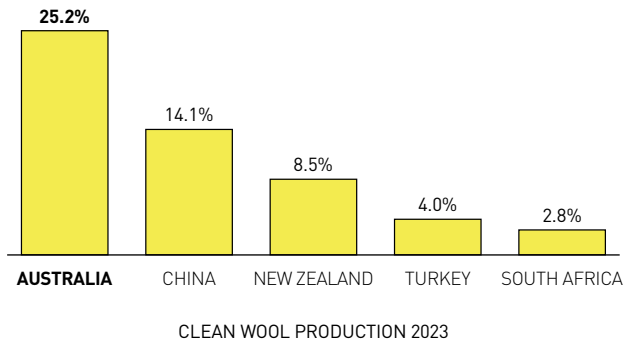
Around 200,000 people employed

Average wool clip per head is 4.45 kg (greasy)<sup>3</sup>

Australia is the leading global supplier of superfine (finer than 18.6 microns) and fine wool (up to 20.5 microns), with 76.9% of the global wool export value



Australia remains the largest clean wool producing country, followed by China, New Zealand, Turkey and South Africa.



Australia is the world's largest producer of Merino wool, accounting for over

**80%** of the world's total production.



## Australian woolgrowers

have been investing in wool R&D and promotion since 1936.

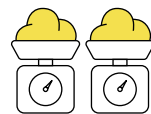


The Woolmark logo is the most recognised textile logos globally. Consumer awareness is strong across the majority of markets, especially in China, Italy, Japan and UK.



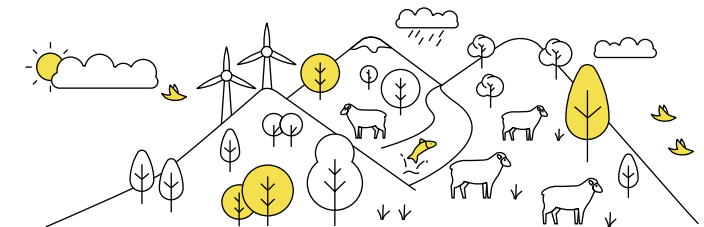
**280 million kg**

of Australian produced greasy wool in 2024/25.









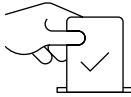





1.5% LEVY

Woolgrowers pay AWI 1.5% of their income from wool to invest in R&D and marketing.



Australian wool is grown in vastly different conditions to Europe or the USA. Australian sheep graze free-range in climates varying from cold alpine, high-rainfall areas to hot, dry pastoral zones.

# AWI INVESTING IN R&D AND MARKETING TO INCREASE WOOLGROWER PROFITABILITY

<p><b>54%</b> of AWI's income comes from Australian <b>woolgrowers</b>, with</p> <p><b>25%</b> from <b>Government</b> contributions,</p> <p><b>9%</b> from <b>Woolmark</b> licensees and</p> <p><b>12%</b> from <b>other sources</b>.</p>	 <p>The MLP project concluded 9 years of collecting</p> <p><b>over 2,000,000 data points</b></p> <p>from 5,700 ewes assessed for lifetime productivity.</p>	 <p>Lifetime Ewe Management <b>increases marking rates by</b></p> <p><b>6.1%</b></p> <p>and <b>reduces ewe mortality by</b></p> <p><b>22.5%</b></p>	 <p>AWI has</p> <p><b>132 staff</b></p> <p>in</p> <p><b>11 offices worldwide</b></p> <p>Australia, China, France, Hong Kong (China), Germany, India, Italy, Japan, South Korea, North America and UK.</p>	
 <p><b>INTERNATIONAL WOOLMARK PRIZE</b></p> <p>has an alumni of</p> <p><b>600+ brands</b></p> <p>Over the past 10 years, the program has achieved an average benefit-cost ratio of 2.3.</p>	<p>Since 1964,</p> <p><b>more than six billion</b></p>  <p><b>wool and care products</b> have been quality-certified under the Woolmark Licensing Program.</p>	 <p><b>\$89.8M</b></p> <p>invested in <b>sheep health and welfare</b>, including</p> <p><b>\$48.5M</b></p> <p>on <b>flystrike</b> since 2005.</p>	 <p>AWI Board is directly</p> <p><b>elected by woolgrowers</b></p>	
 <p>Innovative sportswear product developments including more <b>durable yarns</b>, <b>wind and water resistant fabrics</b> and <b>compression wear</b>.</p>	 <p><b>15,348</b></p> <p>active participants across <b>AWI Extension Networks</b>.</p>	 <p><b>2,139</b></p> <p><b>Shearers and wool handlers trained</b> during 2024-25. <b>\$3.3 million</b> invested in shearing in 2024-25.</p>	 <p>AWI continues to invest in the development of <b>emerging markets</b>. Key markets include: <b>Portugal, Bangladesh, Peru, Mexico and Vietnam</b>.</p>	 <p>The long-term (2014-2022) average <b>reduction in losses</b> to predation due to the <b>AWI Community Wild Dog Control Initiative</b> and other on-ground support <b>averaged 81%</b>.</p>