

Q2 / 2022-2023

## Welcome to AWEX Update Q2 / 2022-2023

“In this issue AWEX welcomes new Directors to the AWEX Board, has released the official schedule for the introduction of eBale, WoolClip hits new highs breaking through the 100,000 bale threshold and is preparing for the 2023 review of the NWD, as well as updates on a number of other services.”

Mark Grave  
CEO

## Strategy 2022-2026

*“Delivering independence and expertise that underpins integrity in the wool industry”*

The AWEX 2023 Strategy meeting will be held on 24 March 2023. AWEX’s services are trusted and widely used by industry stakeholders including: NWD Certificates, Market Information, Administration services, QA programs including wool classer registration and Code of Practice to name a few.

## AWEX Board Refresh

At the 2022 AGM, AWEX appointed a new Chair and has welcomed two new Directors following the retirements of Robyn Clubb AM, John Colley and Ed Storey.



- Andreas Clark was appointed AWEX Chair at the AGM on 25 November 2022. Andreas joined AWEX as a Director in August 2022 and replaces Robyn Clubb AM who served as AWEX Chair for 6 years.

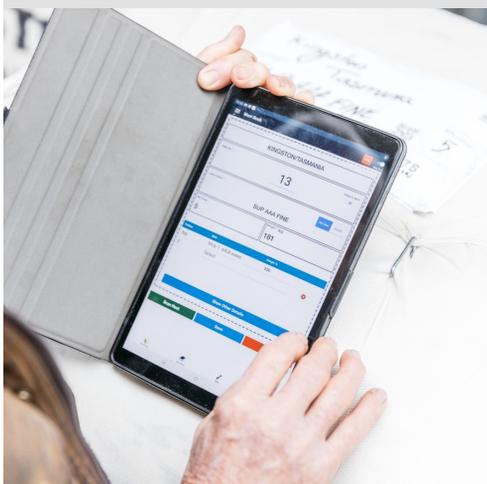
Andreas is making himself known and will take every opportunity to engage with members over the coming year.



- Jonathan White, Nutrien Ag Solutions was appointed Director, elected by ‘Large’ Brokers, replacing John Colley who served as an AWEX Director for a total of 9 years. Jonathan White is also Chair of AWH.



- Steven Harrison was appointed as the Director elected by Grower Members. Steven had served as an Alternate Director and is also WoolProducers President. Ed Storey served as an AWEX Director for 4 years.



# Wool Classers & Classing

- 14,573+ registered classers, down 1,669 (-10.3%) compared to 2019-21,
- Classer Category Movement:
  - AWs (-723): NSW (-401),
  - OCs (-818): SA (-304),
- Fact: AWEX registers 6 new AW classers for every 1 new OC classer. This is a trend that has continued over the last decade.
- Issues of concern:
  - Cost of and access to classer training as follows: see new TAFE initiatives in NSW and TAS,
  - Ongoing access to a skilled and experienced workforce, and
  - Employment conditions in the wool shed.
- WoolClip uptake has been strong with existing classers; however, the level of training in WoolClip of new and current students needs to lift to meet the increasing demand from industry. AWEX will be working with trainers over the coming months to increase their confidence in using WoolClip and to ensure new wool classers are job ready.
- The 2023 National Graduate Wool Classer Competition will be held at the Sydney Royal Easter Show on Tuesday 11th April.
- Facebook: AWEX, through its Facebook page, has received considerable interest, comments, questions and discussion regarding wool technical issues. The posts are proving very popular and are a technical reference point for the wool industry with a regular impressions/reach of between 10,000-20,000.  
[www.facebook.com/woolexchange](https://www.facebook.com/woolexchange)



## CERT IV Wool Classer Training: NSW & TAS

Industry has been calling for opportunities and programs to incentivise training in skills urgently required in the wool industry.

In December, TAFE NSW and TAS announced that 2023 would be Fee-free for CERT IV Wool Classing.

With the announcement of Fee-free courses in 2023, TAFE NSW & TAS have answered that call to provide the requisite training.

Please follow the links below to learn more about the courses and eligibility. Please share this with your staff and clients.

Note: at this time only NSW & TAS are offering Fee-free courses.

### Commonly asked questions:

How long is the course?

The enrolment period is 2 years for CERT IV; however, most trainers will provide resources and course material which would allow for study at your own pace, which could shorten the course length.

Is there still an Owner Classer course?

Yes, this is CERT III in Wool Clip Preparation. The CERT III comprises 11 units that are common to the CERT IV course. Both courses comprise 14 units of competency.

What do the Fee-free Wool Classer TAFE course involve?

NSW and Tasmania have joint initiatives with Government to provide Fee-free courses that include wool classing CERT IV (AHC41316).

To be eligible for Fee-free TAFE NSW, at the time of enrolment the individual must:

- Live or work in New South Wales.
- Be an Australian or New Zealand citizen, permanent Australian resident or a humanitarian visa holder.
- Be aged 15 years or over, and not enrolled at any school.

Fee-free TAS TAFE and vocational education is a joint initiative of the Australian and Tasmanian Governments, providing tuition-free training places to students wanting to train, retrain or upskill.

Links to enrol in Fee-free wool classing CERT IV:

<https://www.tafensw.edu.au/course-areas/farming-and-primary-production/courses/certificate-iv-in-wool-classing-AHC41316-01-GR>

<https://www.aussieagtraining.com/certificate-iv-in-wool-classing>.

<https://www.tastafe.tas.edu.au/courses/course/ahc41316>.

A list of the National training providers that are on scope to deliver CERT IV Wool Classing and CERT III in Wool Clip Preparation (Owner Classer) course code AHC33016, can be found at <https://training.gov.au/>.

## Looking for a Wool Classer? Try, Woolsearch!



AWEX has a list of currently registered professional wool classers (AWs & MCs) available on Woolsearch.

<https://www.awex.com.au/wool-classer/woolsearch/>

Woolsearch contains a list of professional wool classers by state and suburb/postcode. All classers listed are current and registered, complete with contact numbers and/or email addresses.

Woolsearch is a free service available to all wool brokers, growers, members and shearing contractors.

If you are in need of a wool classer try Woolsearch.

## WoolClip – Momentum is Growing

- WoolClip has recorded its biggest 12 month period yet, breaking through 100,000 bales for the first time in a calendar year.
- In calendar year 2022, 113,636 bales were captured and processed using WoolClip. This eclipses 2021 by +45.1%.
- The first half of season 22/23 has produced 64,750 bales and increase of +67.4% for the same period in the previous season. These spectacular results are largely due to:
  - Acceptance and increasing use of technology in the wool shed,
  - Greater awareness and understanding of the value and importance of traceability,
  - Improved accuracy and efficient transfer of wool data (including the NWD), and
  - AWEX's increased presence and commitment to WoolClip training and extension across Australia.

AWEX is offering training to all AWEX members and is present at key industry events including Ewe Competitions, Field/Technology days, broker training/client days and classer forums.

If you, your staff or your clients would like to receive training in WoolClip, please contact John Cox (m. 0468 533 529 or e. [jcox@awex.com.au](mailto:jcox@awex.com.au)) or Fiona Raleigh (m. 0403 396 842 or e. [fraleigh@awex.com.au](mailto:fraleigh@awex.com.au)) to arrange a suitable time/date.

Note: WoolClip support is available 7 days a week.

- As advised previously, wool growers will have the ability to share their wool data with AWI's WoolQ. This functionality is still in development and should be available for release in March.

- Upcoming Events for 2023:

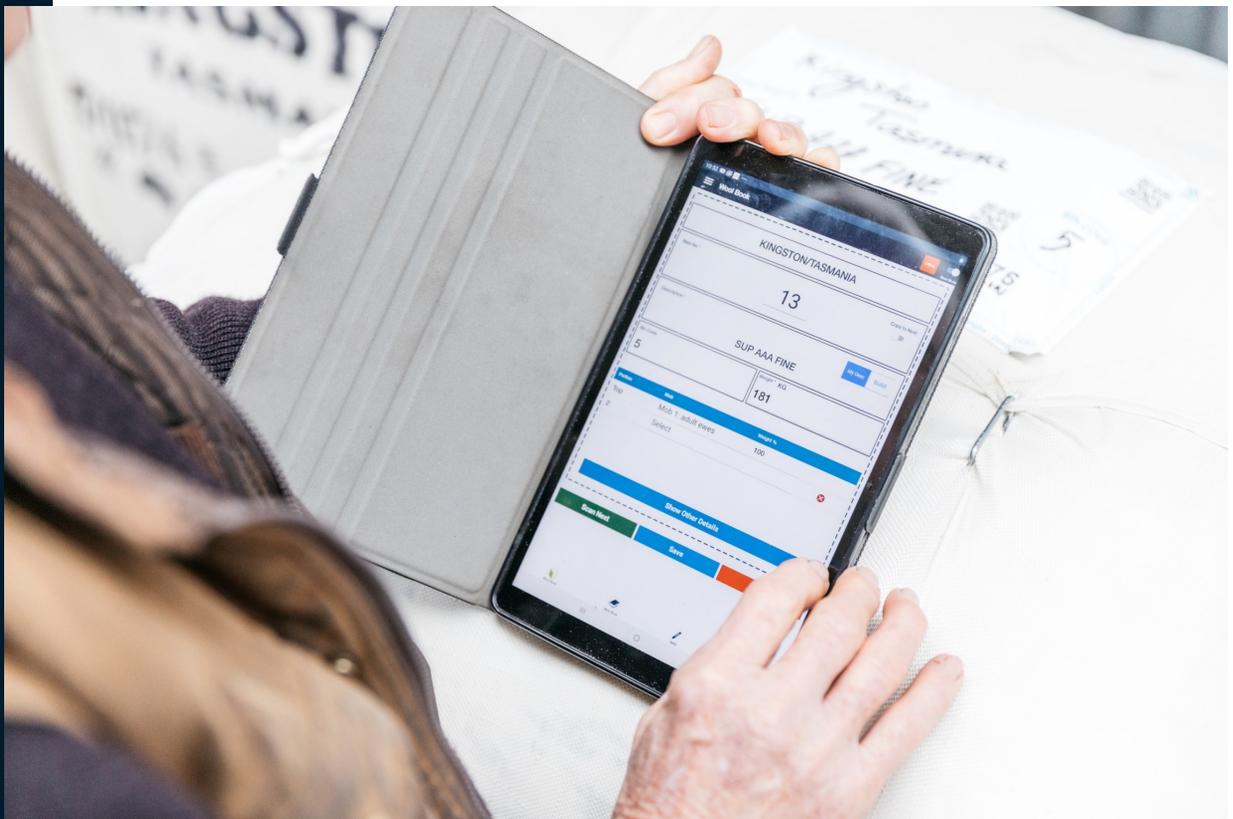
**WoolClip Focus Group**  
23rd January (Developing Tally Book)

**Elmore Shearing Field Day**  
7th February

**PWS Wyvern weekend**  
11th and 12th February

**Wool Forum**  
25th February WA

**WoolClip Working Group meeting**  
15th March



## eBale & Traceability Project

AWEX received commitment from all major member, grower and industry organisations to implement eBale. The announcement, made on 14th Nov 2022, <https://www.awex.com.au/members/members-update/>, highlighted the following key dates:

- 31 December 2022 - current bale label production will cease
- 1 January 2023 – production of the eBale label to commence
- 30 June 2023 – last date for importation of current non-RFID packs
- 1 July 2023 – only eBale packs to be imported from this date

The media release has been well received both in Australia and overseas. The first milestone date (31st December 2022) has passed with only eBale labels now available for purchase for pack manufacturing.

The next critical date will be 1st July 2023. From 1 July, only eBale packs, complete with RFID/QR Code labels, will be able to be imported into Australia. This will fast track the adoption of eBale and improve Australia's wool credentials. It is anticipated that the first batch of eBale packs, complete with RFID/QR Code labels, will be available for purchase in late February.

AWEX appreciates the support received from a broad cross section of the wool industry for this project and we look forward to the implementation of eBale and the industry leveraging the technology. AWEX has committed to purchasing 5 million RFIDs which is equivalent to 2-3 years of wool packs.

### Retro-fitting Non-eBale packs

AWEX has available (in stock) ~20,000 RFID/QR Code tags for purchase. These adhesive tags can be used to 'retro-fit' existing non-eBale packs. Tags are applied to the bale label for use on farm or in a warehouse.

eBale Tags are available for purchase at a cost of \$0.80ea + GST, including postage. To purchase eBale Tags please contact AWEX.

### Warehouse Integration

As part of this project, AWEX has engaged technical expertise to work with brokers and warehouses. This involves integrating the data into their business with basic functionality including: receiving a bale, finding a bale, stocktaking and dispatching a bale.

### eBale

eBale is the application of a unique bale-ID (number) via a RFID/QR Code on each individual wool pack (ePack). The QR Code is captured on-farm via WoolClip. WoolClip creates, registers and validates the unique bale-ID for integrity purposes. The bale-ID contains a unique number which can then be matched against the record on WoolClip, including Account, PIC, Farm Brand, NWD, bale details etc.



# Statistically Speaking

## NWD

- NWD V9.3: The first 'LN' bales were offered for sale in sale M06. There has been limited 'LN' wool offered for sale since that time.

### Declaration Rates for Mulesing Status

Figures based on % sum of bales, all breeds & wool types, first-hand offered, P&D Certs, excl. NZ.  
*Note, Liquid Nitrogen is not reported as the small numbers do not produce a % for any analysis.*

*Table 1 Declaration Rates (%) by Mulesing Status and State for Seasons 2010 – 2022 (YTD 31/12/22).  
 Note, insufficient LN declared to record a %.*

Season	2010	2012	2014	2016	2018	2020	2021	2022
<b>National Decl. Rate</b>	42.2	44.8	49.5	61.2	70.2	76.1	75.3	<b>72.8</b>
<b>By Mulesing Status</b>								
<b>NM</b>	5.5	6.6	7.5	9.9	13.0	15.1	17.6	<b>17.6</b>
<b>CM</b>	3.1	2.4	2.8	2.9	2.5	4.1	3.0	<b>2.7</b>
<b>AA</b>	8.4	14.3	18.8	27.7	35.6	40.6	40.5	<b>42.3</b>
<b>M</b>	25.3	21.4	20.4	20.6	19.1	16.3	14.2	<b>10.2</b>
<b>ND</b>	57.8	55.2	50.5	38.8	29.8	23.9	24.8	<b>27.1</b>
<b>By State</b>								
<b>NSW</b>	43.2	49.6	56.3	68.1	75.3	81.4	80.0	<b>77.3</b>
<b>QLD</b>	30.0	38.2	39.5	52.7	75.0	80.3	84.2	<b>86.5</b>
<b>SA</b>	43.6	44.8	55.7	66.6	77.1	83.0	81.3	<b>77.5</b>
<b>TAS</b>	69.1	55.3	50.8	79.9	81.6	87.0	81.2	<b>84.4</b>
<b>VIC</b>	45.3	51.0	60.9	76.0	82.3	82.8	80.1	<b>76.4</b>
<b>WA</b>	36.5	28.4	20.9	31.1	40.3	50.7	51.5	<b>50.1</b>

For more information about the NWD contact:  
 Dr Kerry Hansford, Technical Projects Manager | M 0429 953 344 | E khansford@awex.com.au

Table 2 NWD Declaration Rates (%) by Mulesing Status & Breed/Micron ( $\mu\text{m}$ ) for Season 2021

Breed	Merino				Crossbred				M <sup>o</sup> + XB
Mulesing Status	<18.6	18.6-20.5	20.6-24.6	>24.6	Total	<18.6	18.6-20.5	20.6-24.6	>24.6
NM	18.5	9.5	7.0	26.5	12.6	27.1	33.2	38.3	38.5
CM	4.4	2.7	1.9	2.6	3.2	0.0	0.0	0.8	1.9
AA	49.8	46.9	43.9	14.4	47.5	20.4	8.7	10.5	10.8
M	10.9	15.3	20.8	26.7	14.5	7.7	8.9	11.2	13.4
ND	16.4	25.6	26.4	29.7	22.1	44.8	49.1	39.2	35.4
<b>Total Bales</b>	<b>470,752</b>	<b>538,635</b>	<b>191,339</b>	<b>501</b>	<b>1,201,227</b>	<b>181</b>	<b>1,270</b>	<b>54,038</b>	<b>227,800</b>

Table 3 NWD Declaration Rates (%) by Mulesing Status & AWEX ID Breed/Micron ( $\mu\text{m}$ ) for S22 (YTD31/12/22)

Breed	Merino				Crossbred				M <sup>o</sup> + XB
Mulesing Status	<18.6	18.6-20.5	20.6-24.6	>24.6	Total	<18.6	18.6-20.5	20.6-24.6	>24.6
NM	19.6	9.8	8.2	18.0	13.4	46.7	36.1	39.3	36.8
CM	3.6	2.9	2.0	0.0	3.0	17.8	0.0	0.4	1.6
AA	50.7	47.9	45.5	9.0	48.6	8.9	13.5	14.4	12.8
LN (M=112, XB=5)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
M	7.9	11.9	16.0	40.2	11.0	3.0	10.9	3.1	7.5
ND	19.2	27.4	28.3	32.8	24.0	26.7	39.5	44.9	41.3
<b>Total Bales</b>	<b>207,084</b>	<b>235,040</b>	<b>86,427</b>	<b>122</b>	<b>528,673</b>	<b>135</b>	<b>762</b>	<b>20,218</b>	<b>90,751</b>

## Premiums and Discounts for Mulesing Status

Criteria for Calculation of Ps and Ds for Mulesing Status

- Australian Stored; Merino Fleece/Weaners and Crossbred Fleece.
- >30 N/ktex, >60% Schlum Dry, <2.2 VMB, Styles 4/5, Good/light colour (incl. H1), P Cert.
- Lengths according to Diameter Range: 70–95 mm (<18  $\mu\text{m}$ ), 75–99 mm (19–21  $\mu\text{m}$ ), 83–104 mm (22–24  $\mu\text{m}$ ), 90–110 mm (26–29  $\mu\text{m}$ ), 100–130 mm (30–34  $\mu\text{m}$ ).
- Records per group (micron/NWD status) >2, empty cells when not enough data to generate a P or D.
- Comparison with Prices for wool declared as Mulesed.

Table 4 Premiums and Discounts for Mulesing Status, Seasons 2015, 2020 – 2022 (YTD 31/12/22)

		MERINO						NON-MERINO				
		16	17	18	19	20	21	22	27	28	29	30
Season	<b>NON MULESED (NM)</b>											
	2015	10	15	7	8	8	1	-15	0	-1	1	4
	2020	33	27	32	26	19	19			0	6	2
	2021	78	77	68	53	51	12		7	5	8	
	2022		<b>52</b>	<b>40</b>	<b>25</b>	<b>6</b>	<b>6</b>		<b>5</b>	<b>-8</b>	<b>8</b>	
Season	<b>CEASED MULESING (CM)</b>											
	2015	51	15	3	8	5	4	-1	2	5	-8	-3
	2020		1	3	8	8	3			1		
	2021		61	40	31							
	2022			<b>27</b>	<b>28</b>							
Season	<b>MULESED with ANALGESIC and/or ANAESTHETIC (AA)</b>											
	2015	2	2	-4	0	1	0	2	8		9	14
	2020	19	12	10	11	11	5	3		4	7	2
	2021		16	12	13	14	1	6	3	5	3	
	2022		<b>28</b>	<b>9</b>	<b>12</b>	<b>4</b>	<b>2</b>			<b>9</b>		
Season	<b>NOT DECLARED (ND)</b>											
	2015	8	5	-2	-4	-4	0	0	-6	-4	-2	-2
	2020		-4	2	-5	-6	-1	-2		-8	-4	
	2021		-6	-5	-7	-10	-4		-7	-7	-10	-6
	2022			<b>-18</b>	<b>-2</b>	<b>-3</b>	<b>1</b>		<b>-8</b>	<b>-8</b>	<b>-8</b>	

## 2023 NWD Review

AWEX will commence a comprehensive review of 2023 NWD in the coming weeks.

The review of the NWD will be undertaken in 2023, for implementation in July 2024.

The length of the review period is designed to ensure there is sufficient time for the consideration of all submissions and subsequent consultation with industry, and to facilitate a smooth transition to the next version.

The 2023 Review of the NWD will be undertaken by AWEX through an Industry Consultative Committee (NWD ICC). An Independent Chair will be appointed to the NWD ICC, with Committee members appointed in consultation with industry representative bodies.

The call for submissions was distributed widely on 20th January 2023. Submissions must be received by COB Monday 13th March 2023.

## The Market

- Certified Integrity Scheme (CIS) indicators are being released as part of the weekly market report.
- For more information about e3 or one-on-one training please call Lionel Plunkett 02 9428 6136.
- The first half of 2022/23 season has seen a considerable increase in volume across auction centres. 2022/23 volume of 824,933 bales is the biggest for the same period in six years.
- Seasonal conditions have been wildly varied over the six year period particularly over the Eastern states.

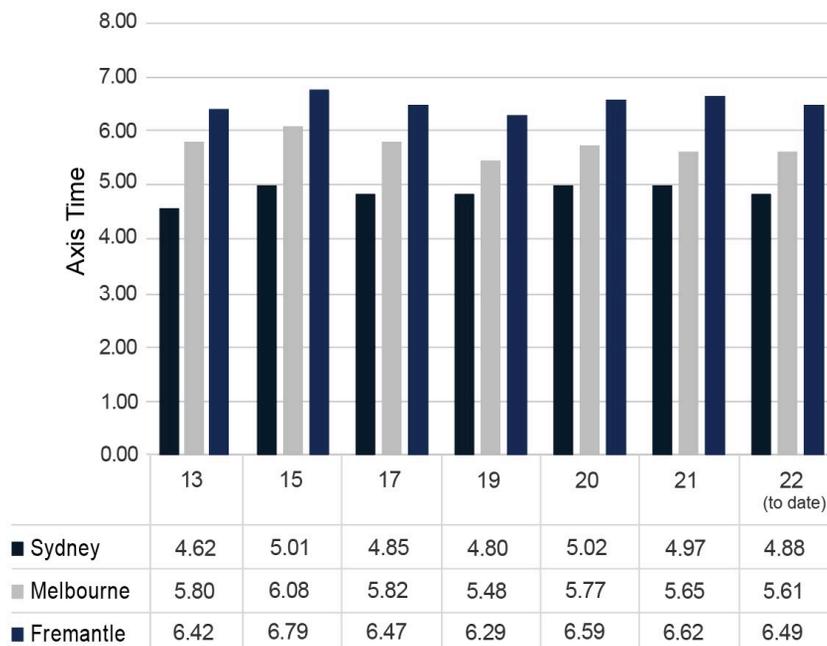
	Jul-Dec	Diff.
2017/18	939,918	48,593
2018/19	772,969	-166,949
2019/20	727,112	-45,857
2020/21	719,503	-7,609
2021/22	817,738	98,235
2022/23*	824,933	7,195

At the Australian Wool Production Forecasting Committee's December meeting, shorn wool production for 2022/23 remains unchanged at 340 Mkg greasy, up 5.0% on the 324 Mkg greasy estimate for 2021/22.

Since then, QLD and NSW have experienced more heavy and flooding rains.

\*Season 22 data reflects data recorded as of 16/01/23.

Average Lot Size by Centre  
(Seasons 13-22\*)



## SustainaWOOL™

INTEGRITY SCHEME

- The start of 2023 has been busy for the SWIS team with membership renewals and new members joining this important program. We recently welcomed SustainaWOOL grower number SW1245.
- An ISO 9001: 2015 external audit for both SWIS and NWD-IP was conducted in December resulting in full re-certification. This allows AWEX to continue the high standards already achieved in these programs for our growers.
- The wool selling year has started strongly with a large number of offerings presented for sale. The SustainaWOOL team continues to review and audit each week's sale lots to ensure the accreditation is attached to the lots offered for sale.
- Our SustainaWOOL audit team are now back on deck and in full swing visiting our growers. The level of compliance being reported is excellent and it is certainly pleasing to see the high standards of stewardship and sheep husbandry practices of our wool growers being demonstrated.

