

Insights into the wool industry



Chart 3.3: World Consumption of Major Textile Fibres (mill consumption – all end products)

million tonnes

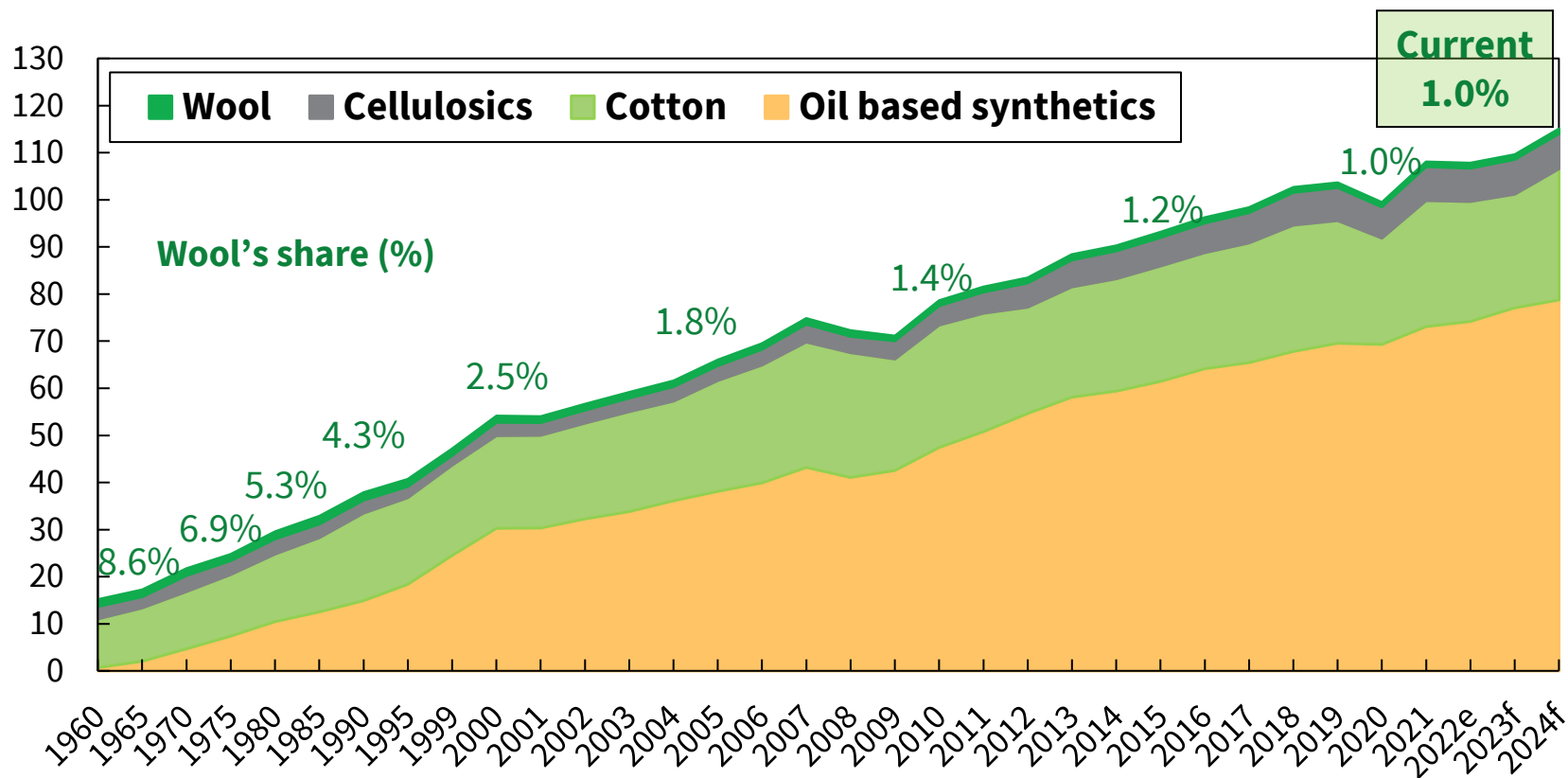


Chart 1.5 World Wool Production by Country: Clean 2022e (% share)

Total 1,051.2 mkg (+1.5% change y-o-y)

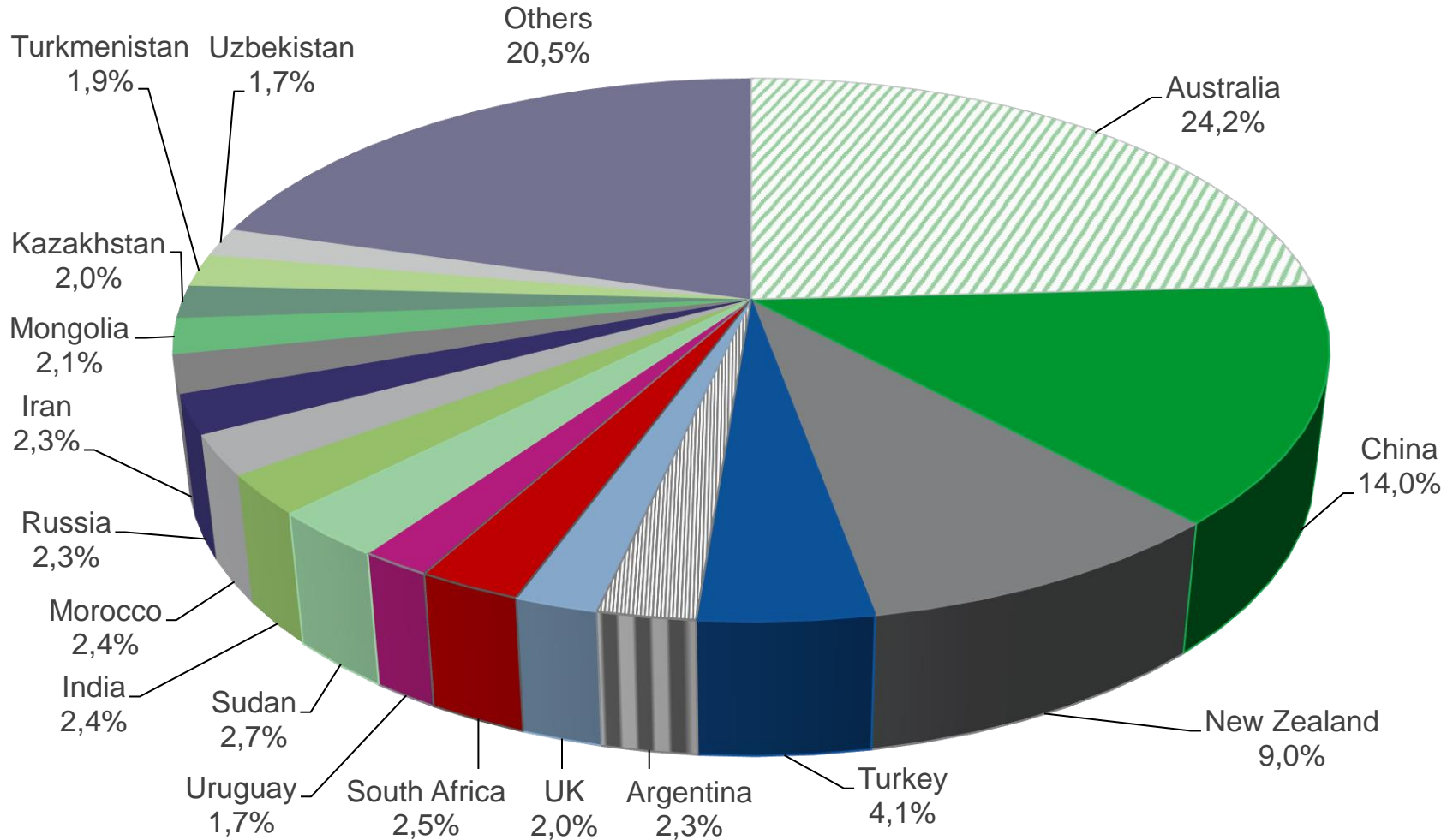
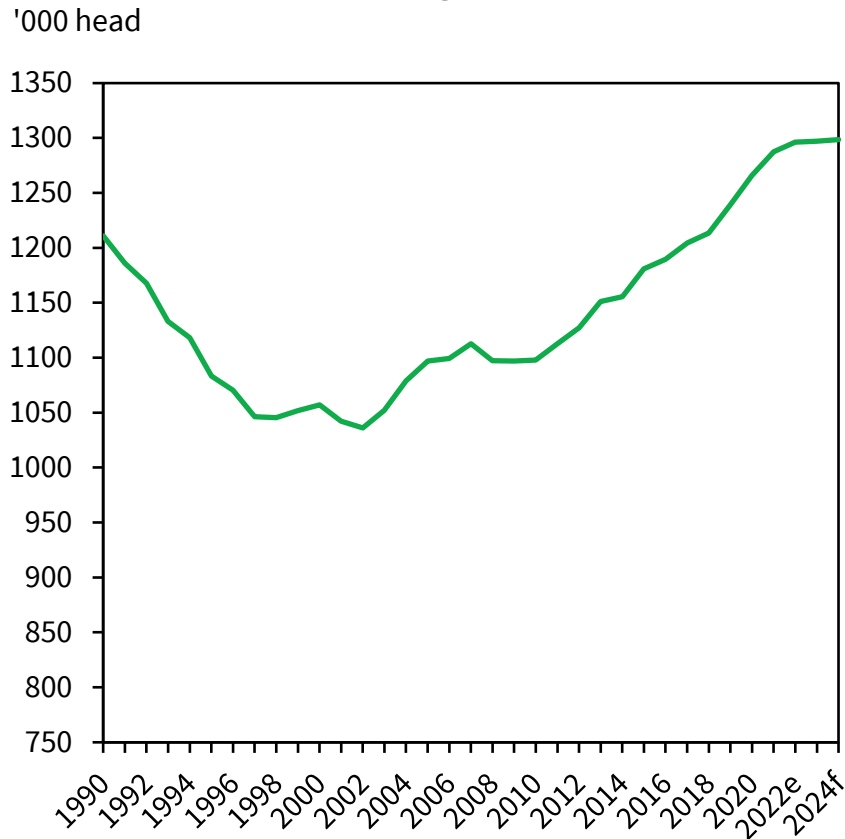


Chart 1.1: World Sheep Numbers

World Opening Sheep Numbers



Sheep Numbers by Selected Country 2022e

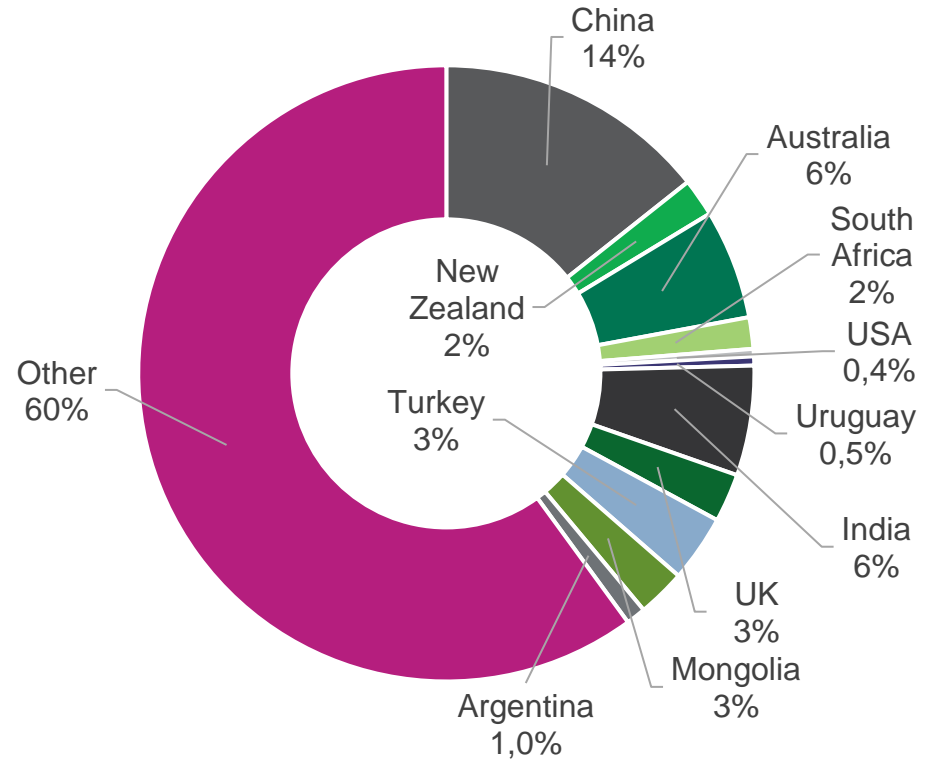
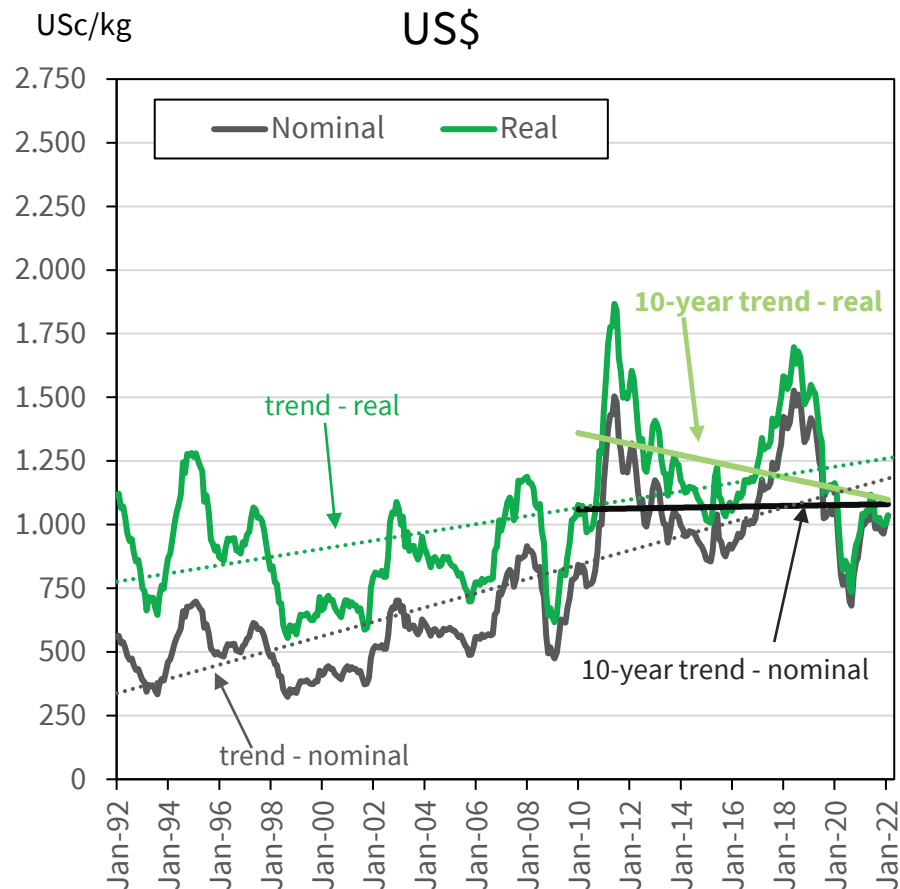
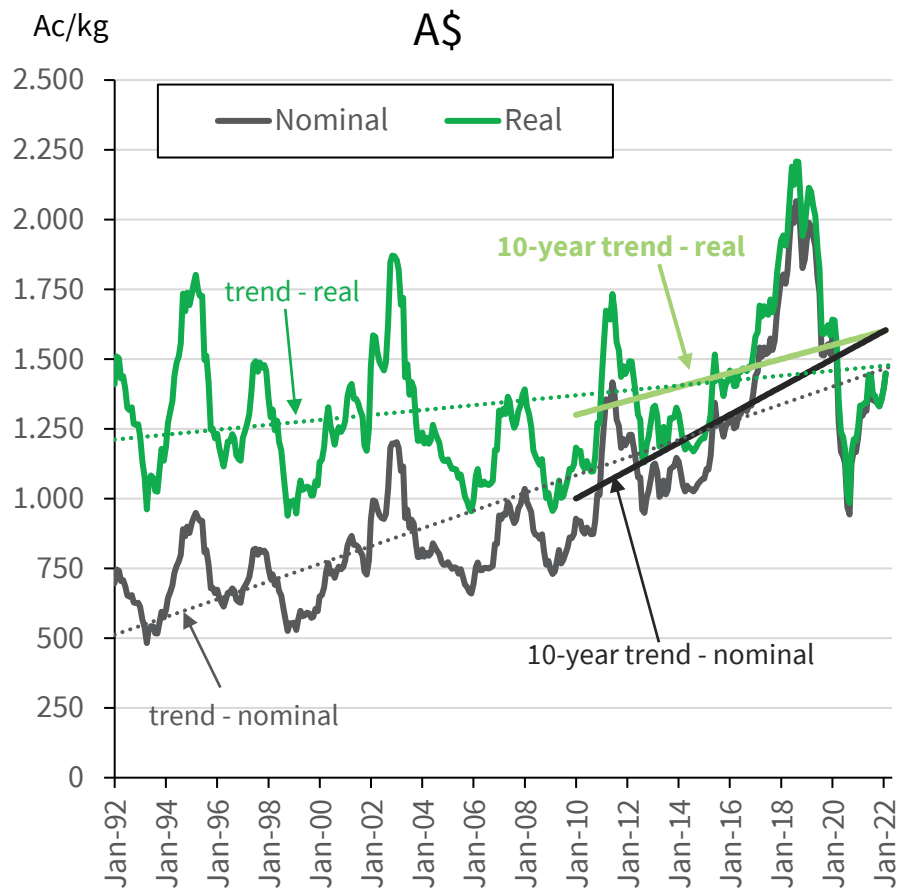


Chart B: Australian Wool Prices – Nominal vs Real Eastern Market Indicator

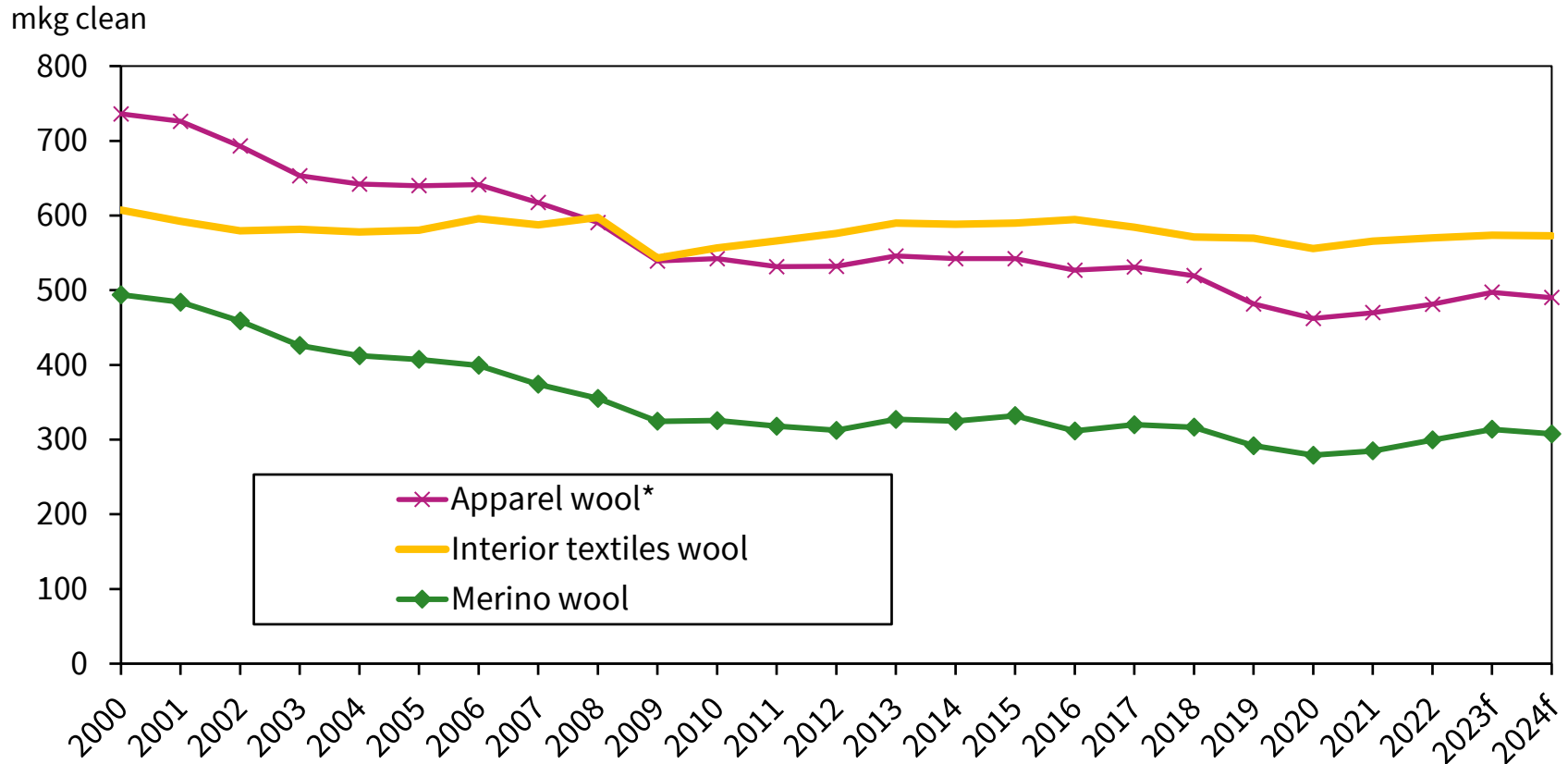


Source: AWEX, Reserve Bank of Australia, International Monetary Fund

Real terms based on January 2022 using Australian CPI for A\$ and US CPI for US\$

Data to January 2022

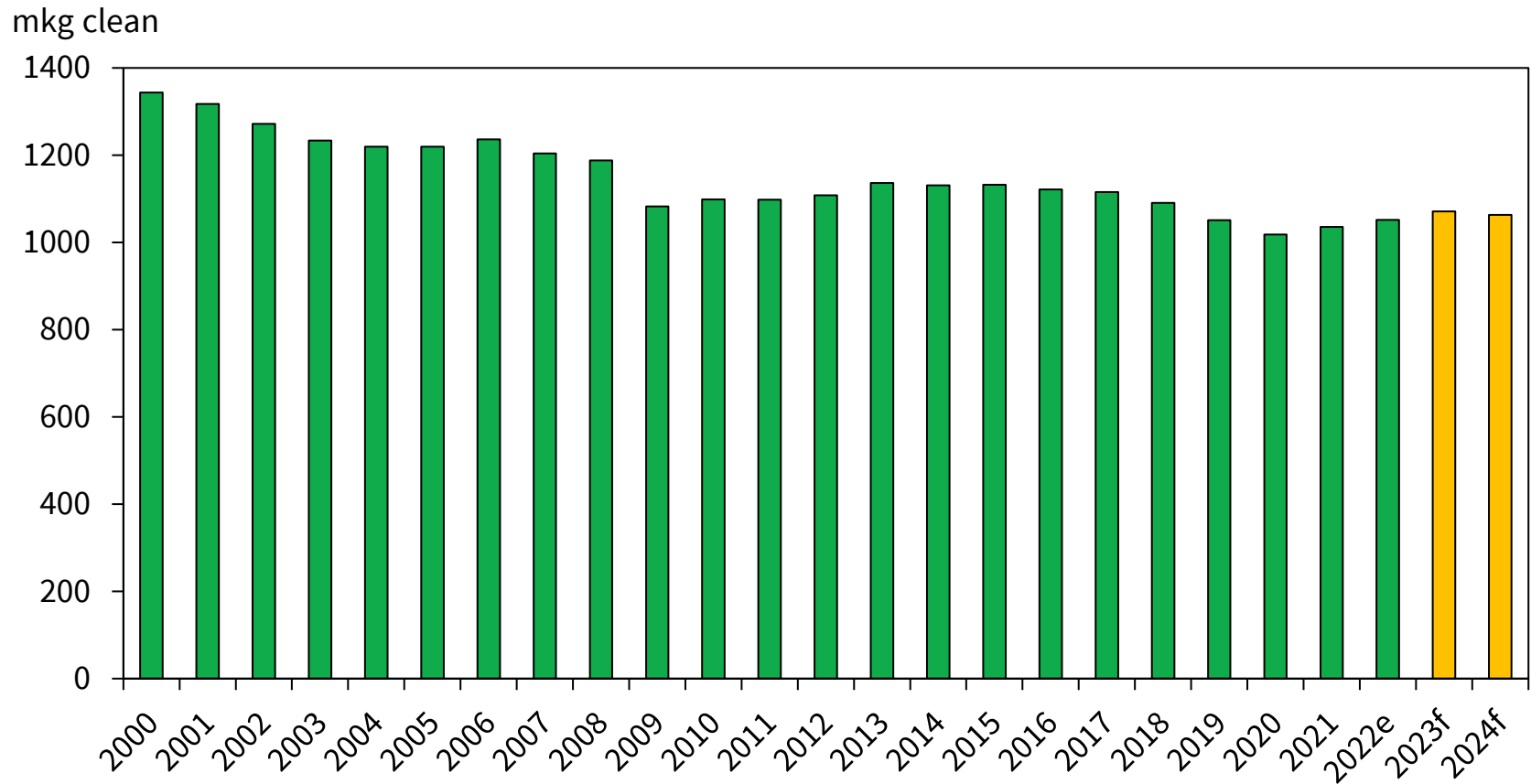
Chart D: Global Production of Wool by Type



Source: IWTO, Country statistics, Poimena Analysis
 Updated 31 January 2023
 Note: Apparel wool INCLUDES Merino wool

Chart 1.2

World Wool Production

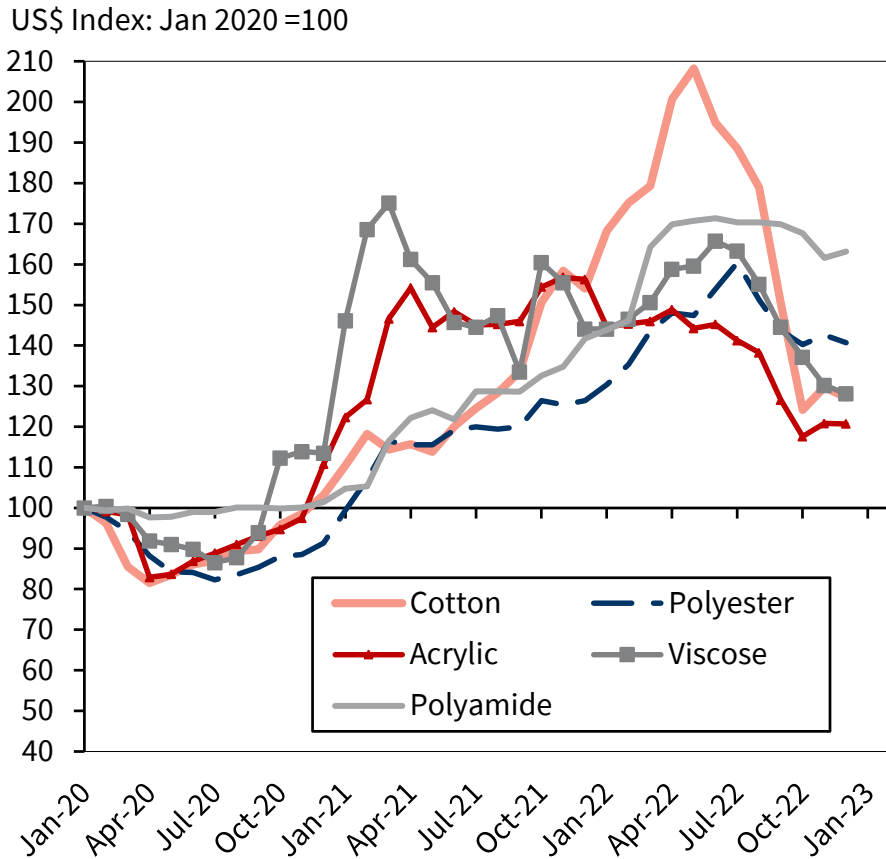


Source: FAO, Poimena Analysis
Note: The year refers to the season ending e.g. 2000 = 1999/2000
Data for 2022 is an estimate and data for 2023 and 2024 is a forecast
Updated 2 February 2023

Chart C: Trends in Textile Fibre Prices

US\$ Index: Jan 2020=100

Competing Fibres



Wool

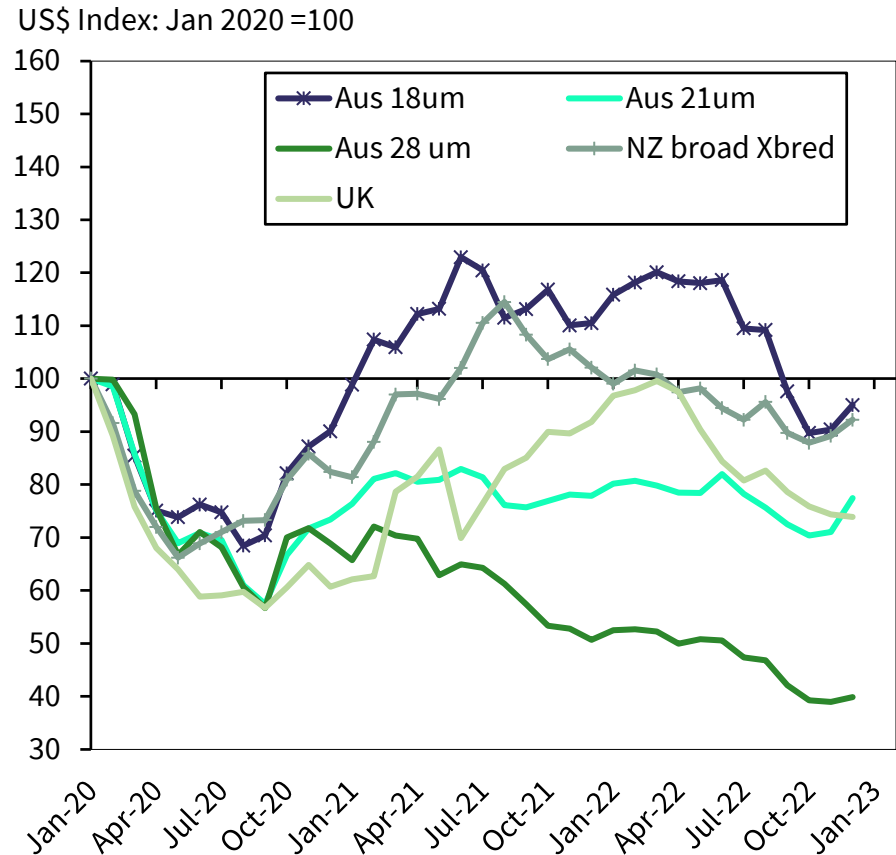
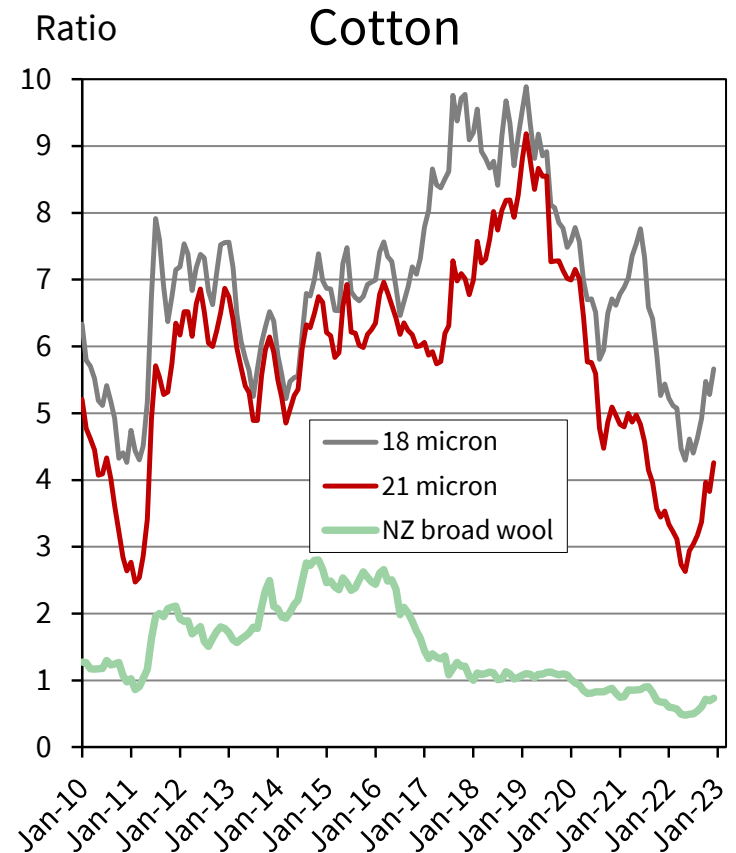
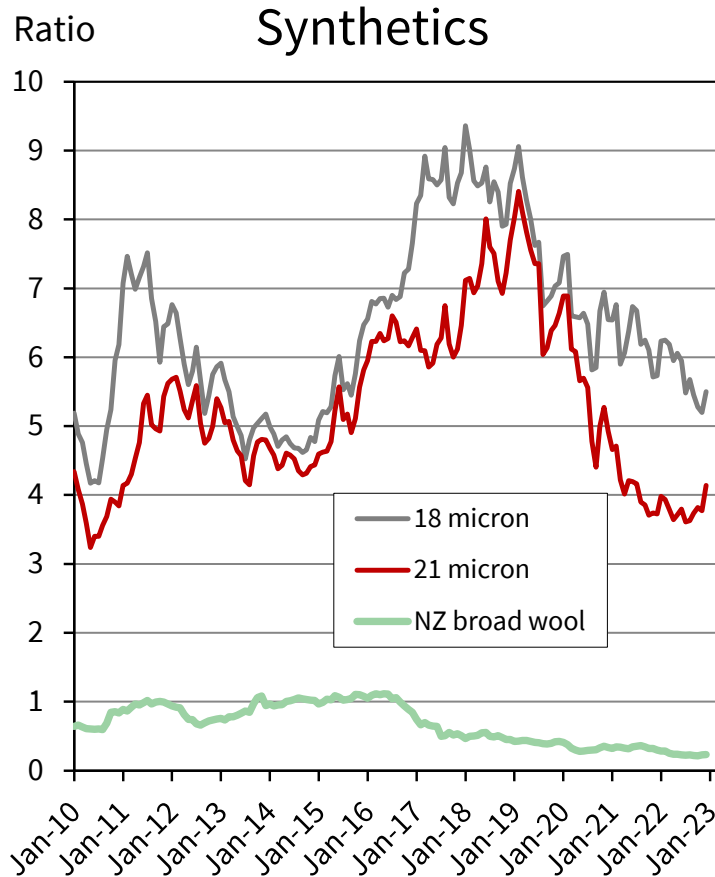


Chart 5.2: Wool Price Relativity with Other Fibres*



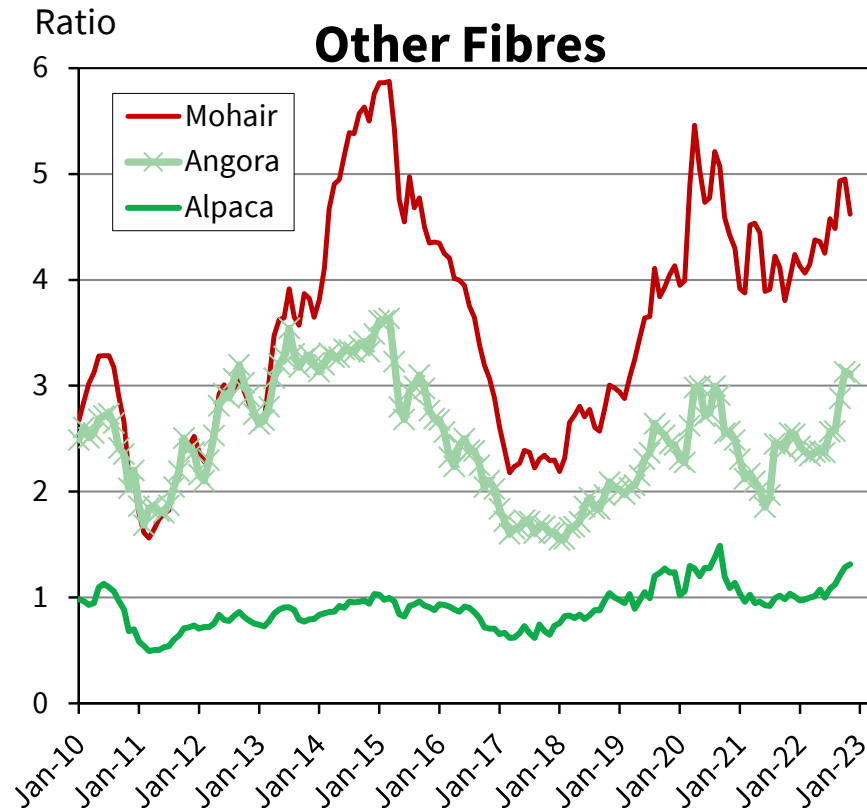
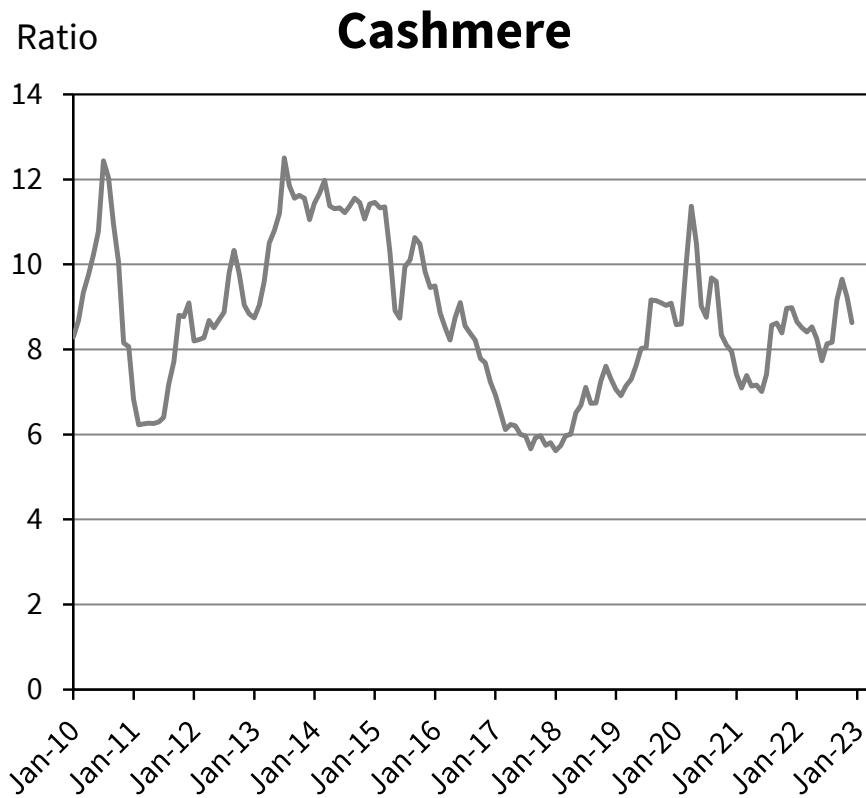
Source: AWEX, Cotton Outlook, Wood MacKenzie Chemicals, CIRFS, Poimena Analysis

Data to December 2022

* The ratio is the wool price divided by the price of other fibres

Note: For NZ Broad wool, the ratio is against polyamide fibre

Chart 5.4: Price of Other Luxury Fibres Versus Superfine Wool Price*

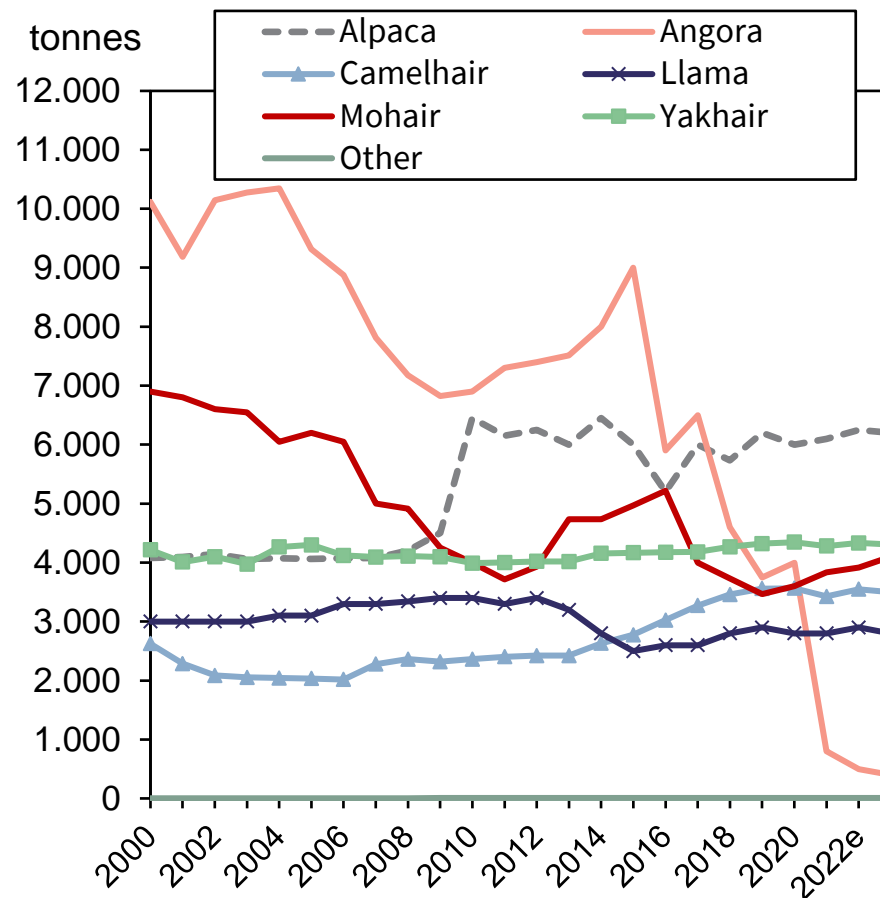
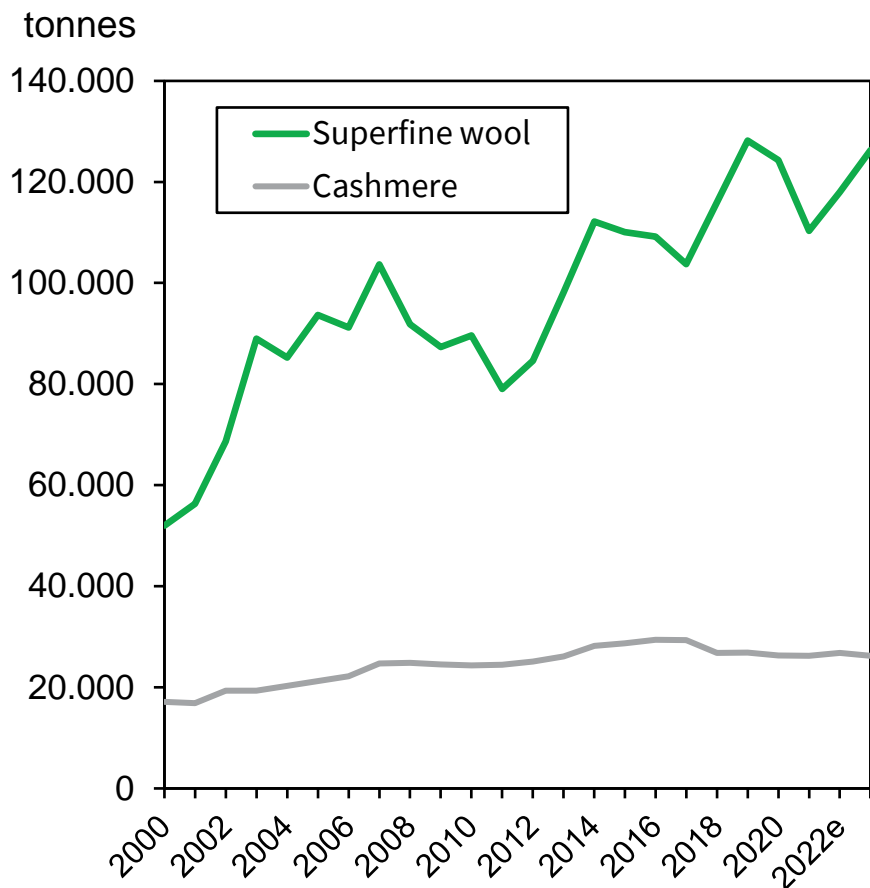


Source: AWEX, Wool Record, Poimena Analysis

* The ratio is the price of other fibres divided by the price for 18 micron wool

Data to December 2022

Chart 3.4: World Production of Luxury Animal Fibres



Source:

China Statistical Year Book, Mohair South Africa, China Wool Textile Association, Naturfasen e.K., FAO, Mongolian National Committee of IWTO, Poimena Analysis & Delta Consultants
Updated 9 January 2023

Chart 2.1: ZQ-certified Wool Available for Sale

Tonnes (clean weight)

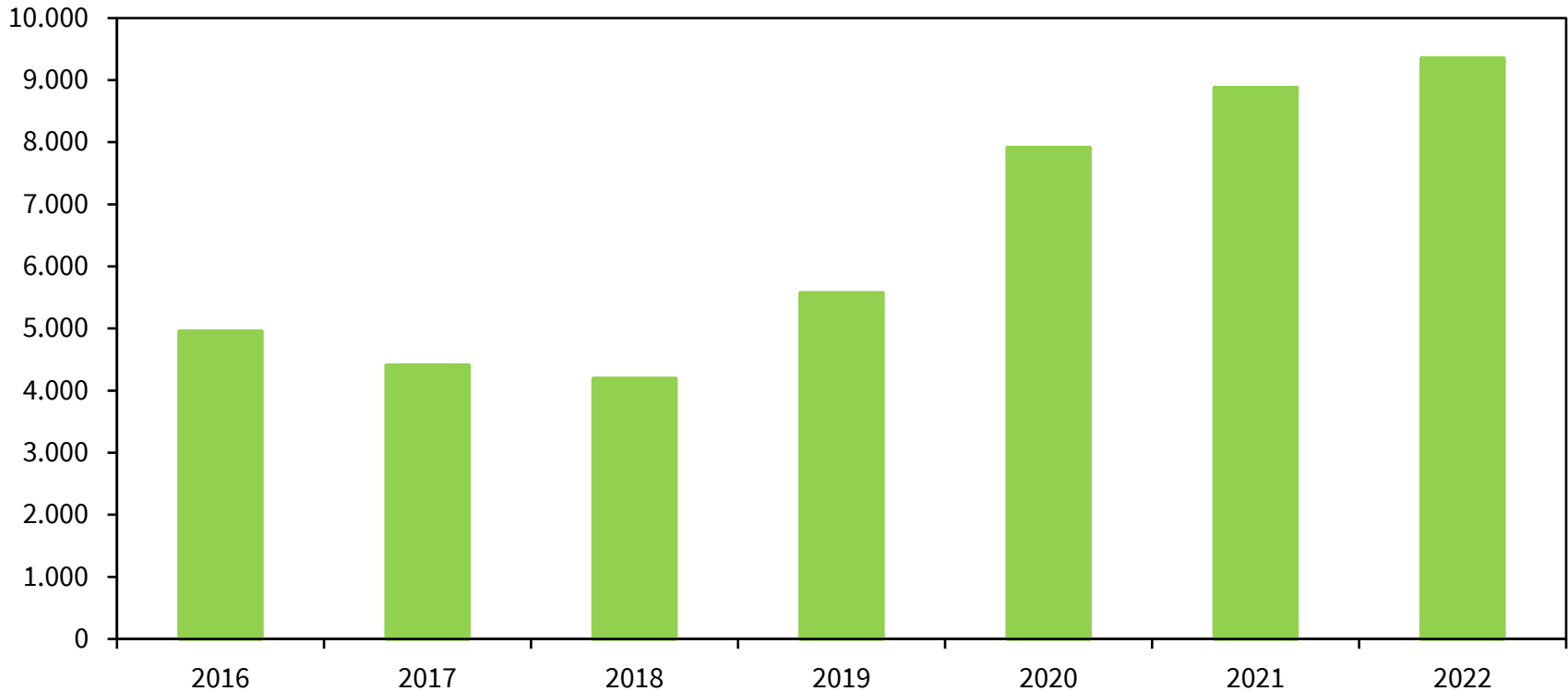
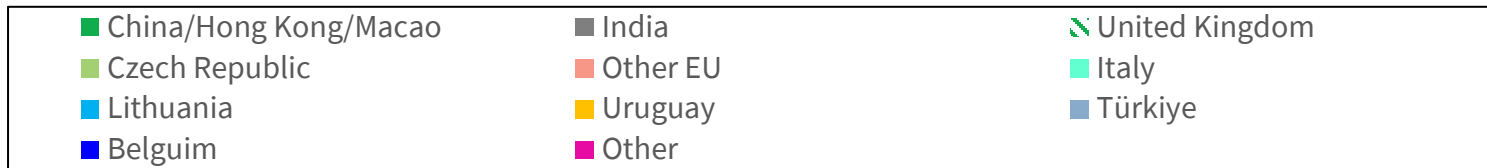
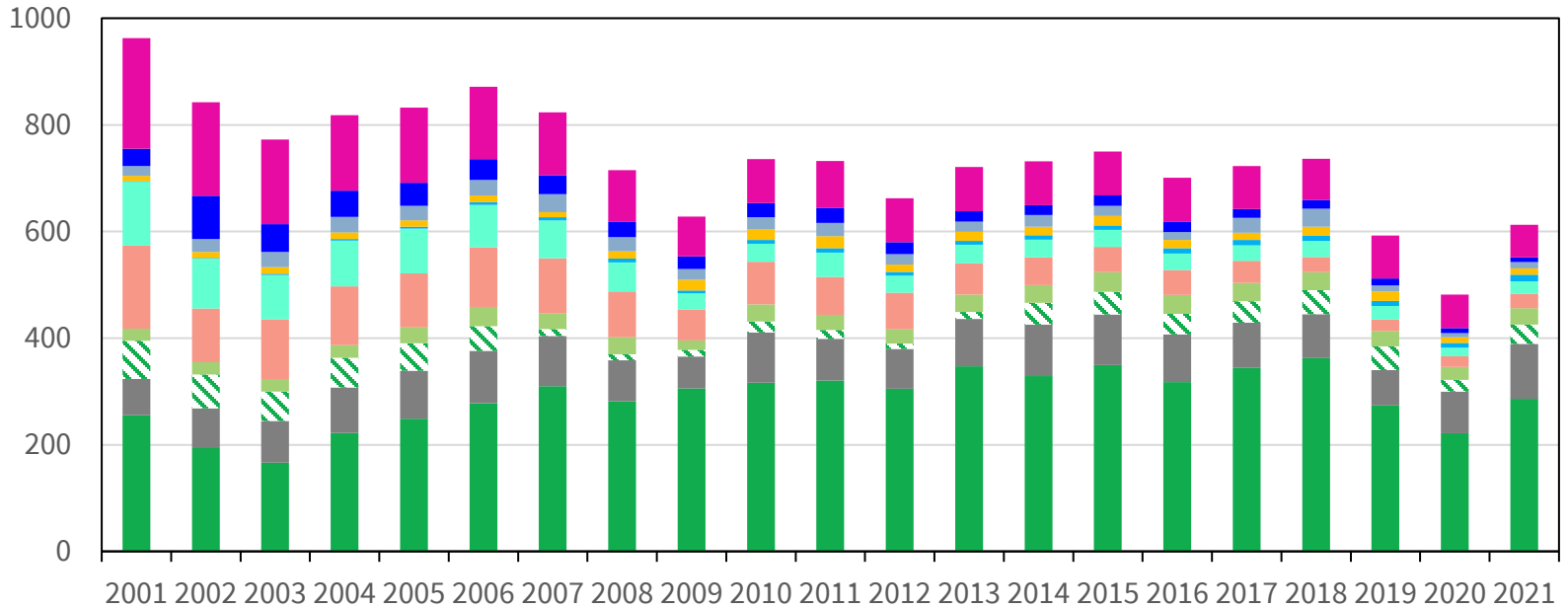


Chart 6.3: Raw Wool Imports

mkg actual weight



Source: Country statistical bureaus and Trademap.org
Includes greasy, scoured and carbonised wool
Updated January 2023

3 Most important challenges

Fast fashion

Supply and Climate Change

East-west tension

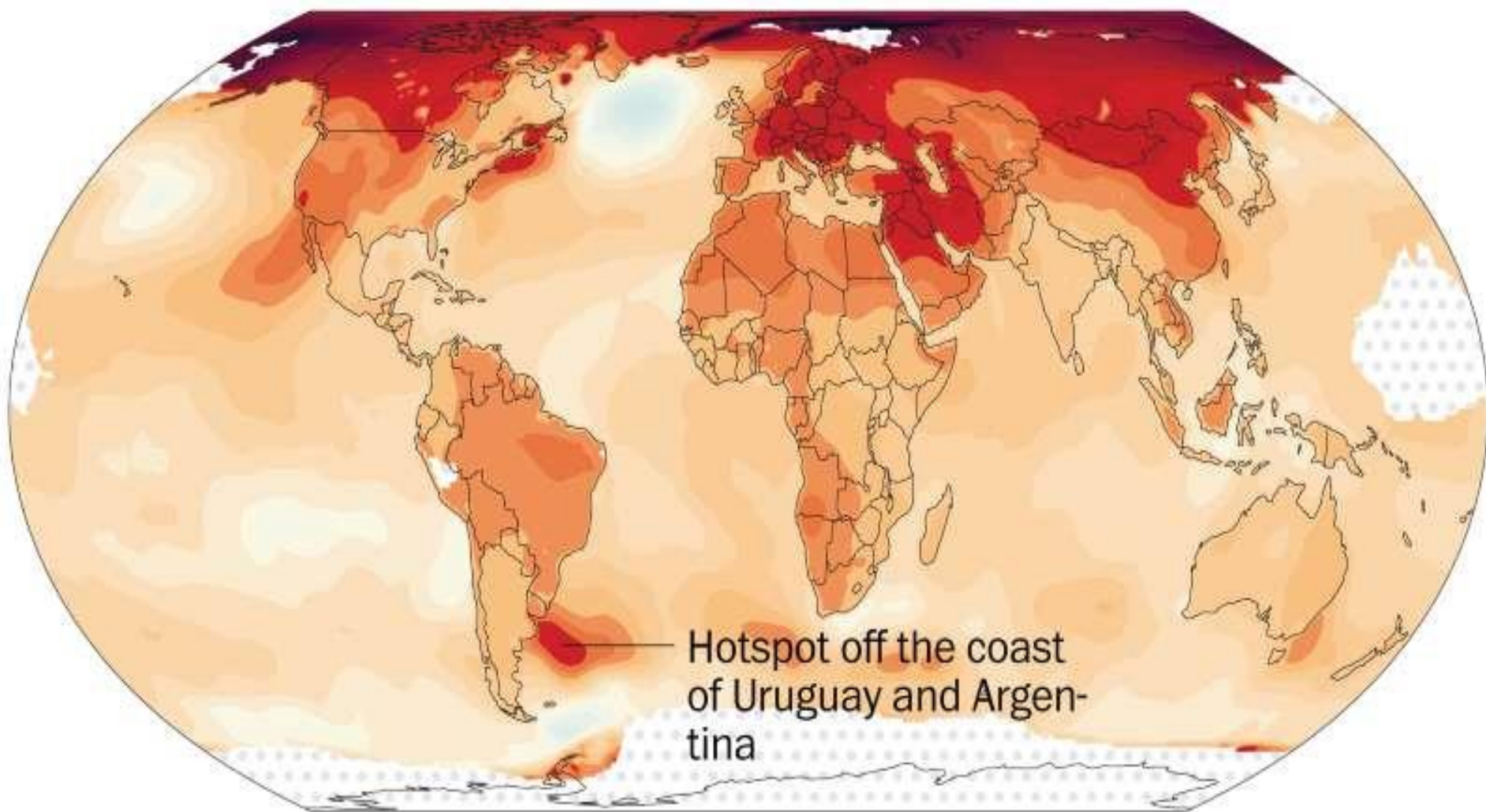
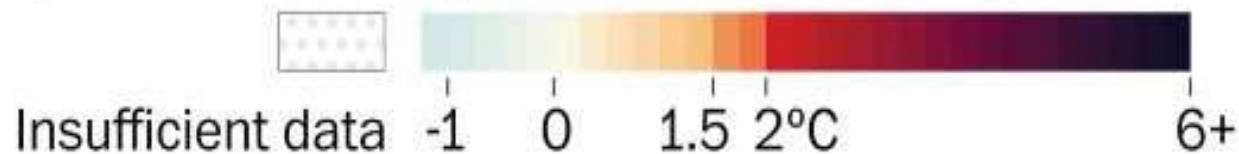


Tension



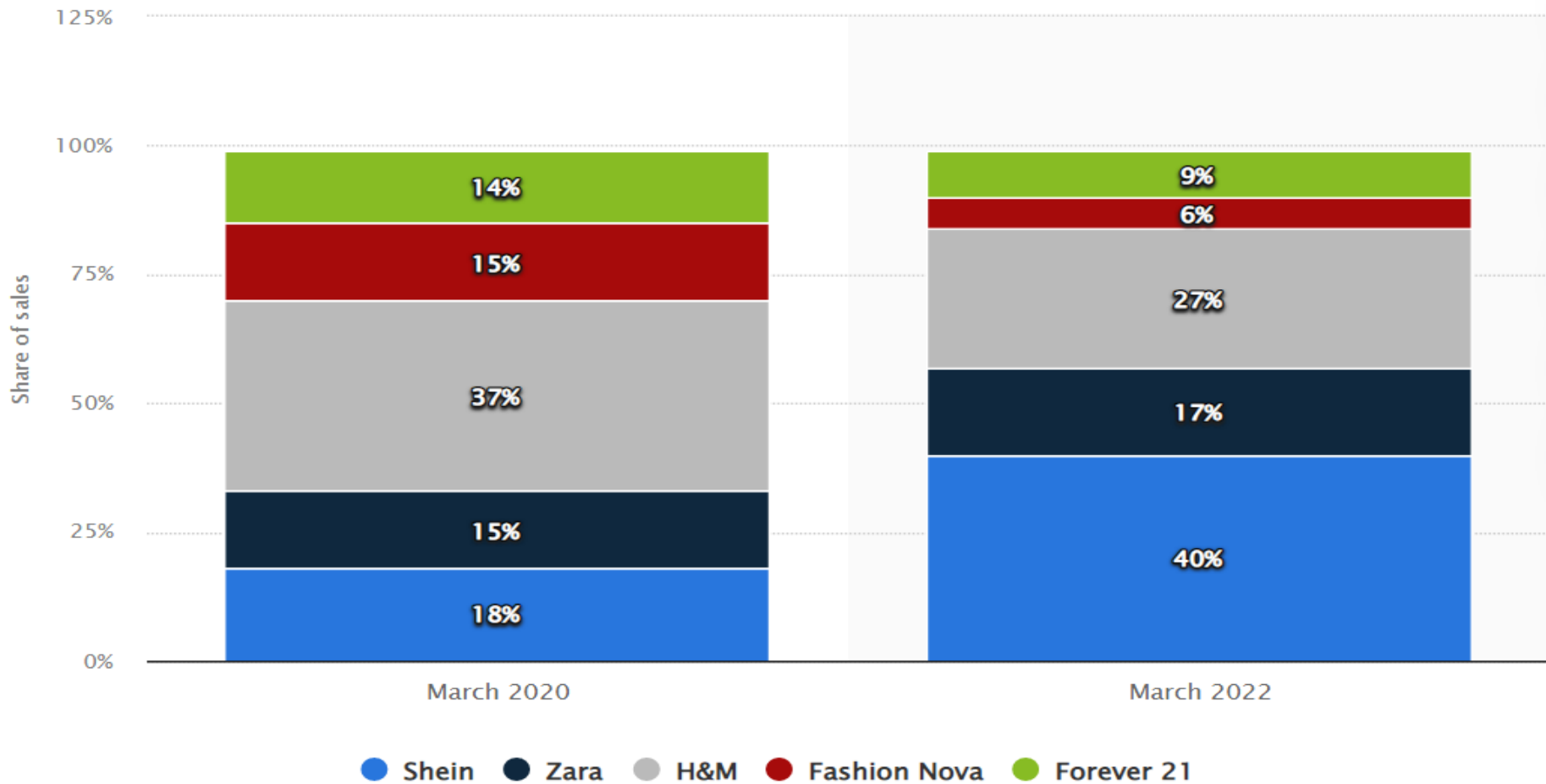
ferguson

Temperature change, 2014-2018 compared to 1880-1899



Source: Berkeley Earth

SHEIN



Thank you

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