

|                                                |                                                                                  |                                                                                                                                                                             |
|------------------------------------------------|----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>VEILINGSDATUM / SALE DATE</b><br>01.09.2010 |  | <b>Tel:</b> +27 (41) 406 7500                                                                                                                                               |
| <b>KATALOGUS / CATALOGUE</b><br>CG 02          |                                                                                  | <b>Faks/Fax:</b> +27 (41) 486 1325<br><b>e-Pos/Mail:</b> <a href="mailto:info@cmw.co.za">info@cmw.co.za</a><br><b>Web:</b> <a href="http://www.cmw.co.za">www.cmw.co.za</a> |

## WOLMARKVERSLAG / WOOL MARKET REPORT

**1 September 2010**

### MARKANALISE

Die tweede veiling van die 2010/11 walseisoen het goed presteer, met veral baie goeie mededinging van vetwol uitvoerders sowel as plaaslike verwerkers. Fynwol van 19 mikron en fyner het soos die eerste veiling met 5% versterk, en alle ander mikrongroepe het 2% duurder verhandel. Vetwoluitvoerders is nog steeds die grootste kopers, wat bykans 80% van die aanbod gekoop het. Ongeveer 98% van die nagenoeg 7000 bale is verkoop. Die hoogste prys op vandag se veiling was vir 'n BH lot, 16.8 mikron van WJ Wessels van Ventersburg wat deur Modiano gekoop is vir R61.65.

### VOORUITSIGTE

In Australia word skeer belemmer deur aanhoudende reën wat kan lei tot verlaagde ontvangste wat ook huidige prysvlakke kan stut. Rou wol voorrade is laag, maar voldoende in die korttermyn, alhoewel kambol voorrade styg in Sjina wat verwag dat bestellings behoort in te kom. Positiewe prysbewegings van fynwol is opmerkbaar, as gevolg van kommer wat heers oor die verbeterde klimaatsomstandighede in Australië, asook die verhoogde produksie van vleislammers wat fynwolproduksie laat krimp.

Vooruitsigte lyk goed, met effens laer aanbiedinge die volgende twee weke, wat pryse goed behoort te onderskraag, asook die wisselkoers wat in die guns van produsente beweeg.

Die volgende veiling sal op die 8ste September geskied met nagenoeg 7,000 bale. So berig mnr James de Jager, Hoofbestuurder: Wol.

### MARKET ANALYSIS

The second sale for 2010/11 performed well, with good competition amongst greasy exporters and local processors. Good long wool of all micron categories, as well as fine wool of 19 micron and finer, improved by 4%, similar to the first sale, all other micron categories sold 2% dearer. Greasy exporters are still the largest buyers purchasing almost 80% of the offer. Approximately 98% of the almost 7,000 bales were sold.

The highest price on today's sale was for a BH lot, 16.8 micron of WJ Wessels from Ventersburg, purchased by Modiano for R61.65.

### FORECAST

In Australia continued rainfall is interrupting shearing, which could lead to a decline in receipts and support current wool price levels. Greasy wool stocks are reported to be low, but would be sufficient in the short term, although top stocks are reported to be rising in China as spinners await new orders. A positive price movement for Fine Wool is evident due to the concern of improving seasonal conditions in Australia, together with increased lamb production, causing fine wool volumes to shrink.

Wool offerings for the next two sales are low which should support current price levels together with the Rand exchange weakening in growers favour.

Next sale will be held on the 8<sup>th</sup> September 2010 with approximately 7,000 bales on offer. So reports James de Jager, General Manager : Wool

### NASIONALE VEILINGSOPSOMMING / NATIONAL SALES SUMMARY

| SUID-AFRIKA / SOUTH AFRICA                             |                    |                                |                      |                                  | KOPERS / BUYERS                          |      |              |            |
|--------------------------------------------------------|--------------------|--------------------------------|----------------------|----------------------------------|------------------------------------------|------|--------------|------------|
| AANBOD<br>OFFER                                        | VERKOPE<br>CLEARED | VERKOOP<br>SOLD                | BEWEGING<br>MOVEMENT | MARKAANWYSER<br>MARKET INDICATOR | BUYER                                    | %    | KOPER        | %          |
| 6,613                                                  | 6,480              | 98.0%                          | +0.9%                | 5826                             | Chargeurs                                | 0.0  | Lempriere    | 15.1       |
|                                                        |                    |                                |                      |                                  | Stucken                                  | 9.3  | New Eng      | 2.4        |
| VOLGENDE VEILING / NEXT SALE                           |                    |                                |                      |                                  | Seg Masurel                              | 11.2 | Standard     | 26.9       |
| datum / date                                           | aanbod / offer     | opmerkings / remarks           |                      |                                  | Modiano                                  | 35.1 | Wool         |            |
| 08.09.2010                                             | ± 7,000            | goeie kwaliteit / good quality |                      |                                  | <b>WISSELKOERS / EXCHANGE RATE (ZAR)</b> |      |              |            |
| AUSTRALIË / AUSTRALIA                                  |                    |                                |                      |                                  | GELDEENHEID<br>CURRENCY                  |      | DATUM / DATE |            |
| vir week geëindig / for week ended - 27.08.2010        |                    |                                |                      |                                  |                                          |      | 18.08.2010   | 01.09.2010 |
| AANBOD<br>OFFER                                        | VERKOPE<br>CLEARED | VERKOOP<br>SOLD                | BEWEGING<br>MOVEMENT | EMI (AUD \$)<br>MARKET INDICATOR | VSA / USA \$                             |      | 7.27         | 7.31       |
| 38,080                                                 | 32,786             | 86.1%                          | -0.5%                | 881                              | AUD \$                                   |      | 6.54         | 6.64       |
| AANBOD VOLGENDE VEILINGSWEEK / OFFERING NEXT SALE WEEK |                    |                                |                      |                                  | EURO                                     |      | 9.34         | 9.38       |
| 36,276                                                 |                    |                                |                      |                                  | STERLING                                 |      | 11.34        | 11.29      |

**HOOGSTE PRYSE / HIGHEST PRICES**

**1 September 2010**

**CMW TOP TIEN - CG 02 - CMW TOP TEN**

|                                     |                            |             |
|-------------------------------------|----------------------------|-------------|
| WJ WESSELS, VENTERSBURG             | Oos-Kaap / Eastern Cape    | R 61.65 /kg |
| RC FLANEGAN, STUTTERHEIM            | Oos-Kaap / Eastern Cape    | R 56.45 /kg |
| JA DE WET, SOMERSET-OOS/EAST        | Oos-Kaap / Eastern Cape    | R 55.95 /kg |
| RC FLANEGAN, STUTTERHEIM            | Oos-Kaap / Eastern Cape    | R 55.90 /kg |
| JA DE WET, SOMERSET-OOS/EAST        | Oos-Kaap / Eastern Cape    | R 55.70 /kg |
| JA HUMAN, CARNARVON                 | Noord-Kaap / Northern Cape | R 55.70 /kg |
| EDUAN VILJOEN BDY, RICHMOND (KP/CP) | Noord-Kaap / Northern Cape | R 55.50 /kg |
| RC FLANEGAN, STUTTERHEIM            | Oos-Kaap / Eastern Cape    | R 55.50 /kg |
| EDUAN VILJOEN BDY, RICHMOND (KP/CP) | Noord-Kaap / Northern Cape | R 53.50 /kg |
| SWALUKRANTZ TRUST, CRADOCK          | Oos-Kaap / Eastern Cape    | R 53.50 /kg |






**VRYSTAAT / FREE STATE**

|                                  |       |      |             |
|----------------------------------|-------|------|-------------|
| WJ WESSELS, VENTERSBURG          | 3 BH  | 16.8 | R 61.65 /kg |
| WJ WESSELS, VENTERSBURG          | 2 BM  | 18.7 | R 52.35 /kg |
| HJ GROBBELAAR, BETHULIE          | 3 AH  | 18.9 | R 51.85 /kg |
| ZUIKERKOP BDY (PTY) LTD, CLOCLAN | 5 AH  | 18.6 | R 51.40 /kg |
| ZUIKERKOP BDY (PTY) LTD, CLOCLAN | 3 BH  | 18.0 | R 50.50 /kg |
| WJ WESSELS, VENTERSBURG          | 4 BMY | 19.0 | R 50.00 /kg |
| D LOUW, TROMPSBURG               | 2 AH2 | 19.0 | R 49.95 /kg |
| WJ WESSELS, VENTERSBURG          | 14 AM | 19.2 | R 49.45 /kg |
| WJ WESSELS, VENTERSBURG          | 3 AMY | 18.8 | R 49.00 /kg |
| WJ WESSELS, VENTERSBURG          | 1 BY  | 18.9 | R 47.90 /kg |

**OOS-KAAP / EASTERN CAPE**

|                                              |        |      |             |
|----------------------------------------------|--------|------|-------------|
| RC FLANEGAN, STUTTERHEIM                     | 1 AH   | 18.4 | R 56.45 /kg |
| JA DE WET, SOMERSET-OOS/EAST                 | 2 CL   | 17.1 | R 55.95 /kg |
| RC FLANEGAN, STUTTERHEIM                     | 1 BH   | 18.3 | R 55.90 /kg |
| JA DE WET, SOMERSET-OOS/EAST                 | 4 AMY  | 18.1 | R 55.70 /kg |
| RC FLANEGAN, STUTTERHEIM                     | 2 CH   | 17.9 | R 55.50 /kg |
| SWALUKRANTZ TRUST, CRADOCK                   | 1 BH   | 16.7 | R 53.50 /kg |
| RC FLANEGAN, STUTTERHEIM                     | 1 HBKS | 18.2 | R 53.25 /kg |
| RC FLANEGAN, STUTTERHEIM                     | 2 AMY  | 18.8 | R 53.00 /kg |
| RC FLANEGAN, STUTTERHEIM                     | 2 AF   | 18.3 | R 52.50 /kg |
| EK DE VILLIERS FAMILIE TRUST, ALBANIE/ALBANY | 2 CL   | 18.3 | R 52.50 /kg |
| PF DE KLERK, BURGERSDORP (ALBERT)            | 1 BH   | 18.9 | R 52.30 /kg |

**NOORD-KAAP / NORTHERN CAPE**

|                                          |        |      |             |                                                                                       |
|------------------------------------------|--------|------|-------------|---------------------------------------------------------------------------------------|
| JA HUMAN, CARNARVON                      | 1 BH   | 18.3 | R 55.70 /kg |                                                                                       |
| EDUAN VILJOEN BOERDERY, RICHMOND (KP/CP) | 2 BBH  | 18.2 | R 55.50 /kg |  |
| EDUAN VILJOEN BOERDERY, RICHMOND (KP/CP) | 1 BH   | 18.3 | R 53.50 /kg |  |
| DL CONROY FARMING, VICTORIA-WES/WEST     | 1 AH   | 18.4 | R 53.00 /kg |  |
| SNEEKUIL TRUST, RICHMOND (KP/CP)         | 4 AH   | 17.9 | R 52.10 /kg |                                                                                       |
| JA HUMAN, CARNARVON                      | 1 AH   | 18.8 | R 51.85 /kg |                                                                                       |
| SNEEKUIL TRUST, RICHMOND (KP/CP)         | 4 CL   | 17.4 | R 51.80 /kg |                                                                                       |
| DL CONROY FARMING, VICTORIA-WES/WEST     | 1 BBH  | 18.1 | R 51.30 /kg |  |
| DL CONROY FARMING, VICTORIA-WES/WEST     | 1 BBFY | 18.8 | R 51.00 /kg |  |
| RJ STEENKAMP, SUTHERLAND                 | 1 CMY  | 18.2 | R 50.60 /kg |                                                                                       |

**WES-KAAP / WESTERN CAPE**

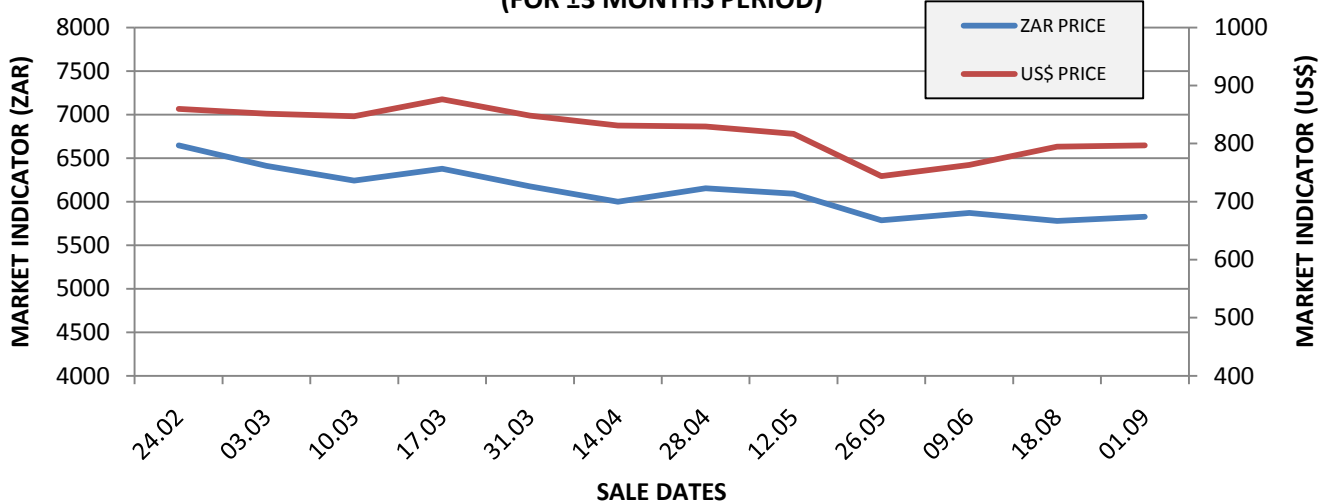
|                                |       |      |             |
|--------------------------------|-------|------|-------------|
| M FOURIE, HEIDELBERG (KP/CP)   | 1 BH  | 17.1 | R 50.00 /kg |
| PARKLANDS BOERDERY, WELLINGTON | 4 BMY | 19.0 | R 46.10 /kg |
| JF UYS, HEIDELBERG (KP/CP)     | 1 BFY | 18.9 | R 46.05 /kg |
| PARKLANDS BOERDERY, WELLINGTON | 3 AMY | 19.3 | R 45.40 /kg |
| HA KOTZE, CALEDON              | 1 BMY | 19.2 | R 45.10 /kg |
| JF UYS, HEIDELBERG (KP/CP)     | 11 BM | 19.1 | R 43.85 /kg |
| HA KOTZE, CALEDON              | 2 AMY | 20.2 | R 42.50 /kg |
| JF UYS, HEIDELBERG (KP/CP)     | 3 CM  | 18.3 | R 42.00 /kg |

*Namens CMW, baie geluk! / On behalf of CMW, congratulations!*  
**PIERRE DE LANGE - WOLBEMARKING / WOOL MARKETING**

**SA WOOL MARKET INDICATOR MOVEMENT IN ZAR AND USD TERMS**

| DATES      | 17.03 | 31.03 | 14.04 | 28.04 | 12.05 | 26.05 | 09.06 | 18.08 | 01.09 |
|------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 19 MICRON  | 7025  | 7054  | 6873  | 6875  | 6959  | 6762  | 6722  | 6797  | 6821  |
| 21 MICRON  | 6292  | 6216  | 6142  | 6240  | 6323  | 6053  | 6086  | 5901  | 6002  |
| 23 MICRON  | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     |
| ZAR PRICE  | 6379  | 6175  | 6000  | 6154  | 6092  | 5787  | 5871  | 5777  | 5826  |
| US\$ PRICE | 876   | 848   | 831   | 829   | 817   | 744   | 763   | 795   | 797   |
| US\$/ZAR   | 7.28  | 7.28  | 7.22  | 7.42  | 7.46  | 7.78  | 7.69  | 7.27  | 7.31  |
| CAT NO     | CF25  | CF26  | CF27  | CF28  | CF29  | CF30  | CF31  | CG01  | CG02  |

**SA WOOL MARKET INDICATOR MOVEMENT IN ZAR AND USD TERMS  
(FOR ±3 MONTHS PERIOD)**



**PRICE MOVEMENT FOR GOOD QUALITY WOOL PER MICRON : 2010/11 SEASON  
SOUTH AFRICAN NATIONAL SALE INDICATOR PRICE**

