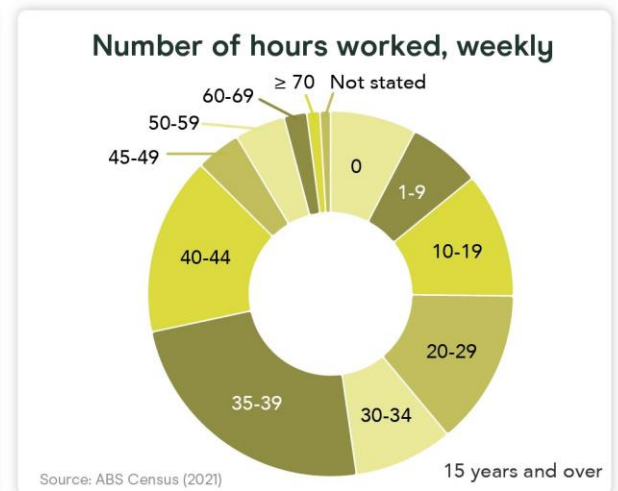
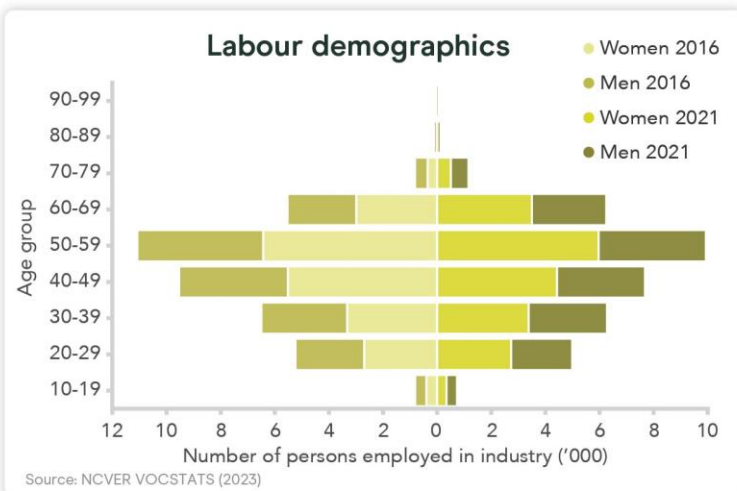
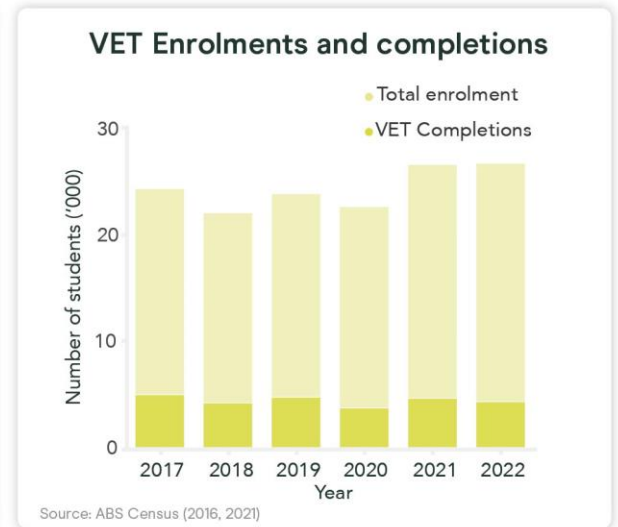
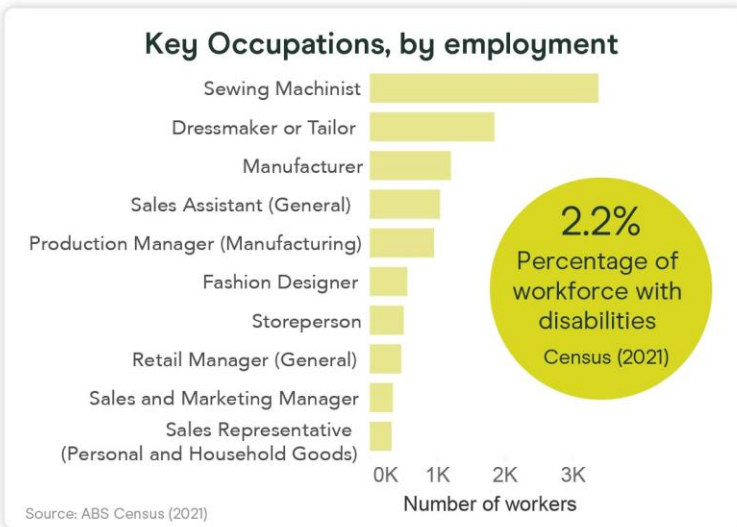
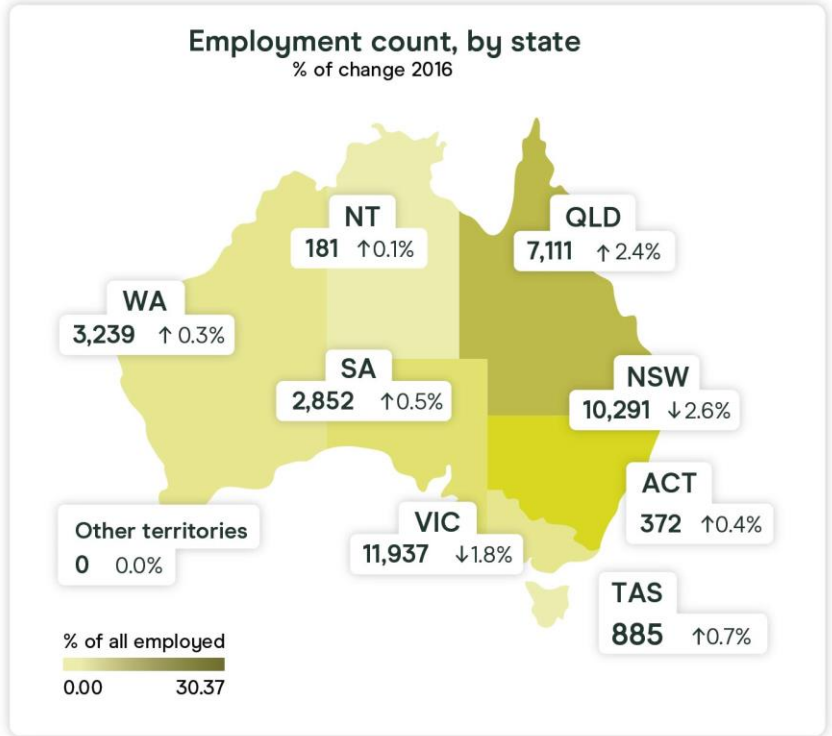


3.13. Textile, Leather, Clothing and Footwear Manufacturing and Services

Textiles, Clothing and Footwear Manufacturing and Services



ANZSIC A1311, A1312, A1313, A1320, A1331, A1332, A1333, A1334, A1340, A1351, A1352, A9531



3.13.1. Industry sectors (ANZSIC Classes)

- Wool Scouring
- Natural Textile Manufacturing
- Synthetic Textile Manufacturing
- Leather Tanning, Fur Dressing and Leather Product Manufacturing
- Textile Floor Covering Manufacturing
- Rope, Cordage and Twine Manufacturing
- Cut and Sewn Textile Product Manufacturing
- Textile Finishing and Other Textile Product Manufacturing
- Knitted Product Manufacturing
- Clothing Manufacturing
- Footwear Manufacturing
- Laundry and Dry-Cleaning Services

Key insights from industry sector infographic and other data	Priority
Ageing workforce	High
High gender diversity	Low

This industry consists of businesses that process and manufacture natural (e.g. wool, cotton and leather) and synthetic (e.g. polyvinyl chloride: PVC) materials, for the production of textiles, leather, clothing and footwear goods. It also covers services associated with these goods, including fashion and textile design, dry cleaning operations, laundry operations and clothing and footwear repairs.

The impact of cheap imports saw traditional textiles, leather, clothing and footwear manufacturing largely replaced by sophisticated manufacturers offshoring all or some production work, and local boutique manufacturers carving out niche and specialised market segments. However, increasing consumer interest in locally made, ethical and sustainable products is providing a new focus for businesses. This shift to more bespoke products relies on the availability of quality craftsmanship and strong technical skills.

The National Training Register details qualifications corresponding to specialised job roles in this industry:

- Leather Production (Certificates II, III)
- Laundry Operations (Certificates II, III)
- Apparel, Fashion and Textiles (Certificates II, III, IV, Diploma, Advanced)
- Manufactured Textile Products (Certificate III)
- Millinery (Certificates III, IV)
- Footwear (Certificate III)
- Custom-Made Footwear (Certificate IV)
- Dry Cleaning Operations (Certificate III)
- Textile Design and Technology (Certificate IV)

Below are examples of units of competency, which sit within these qualifications, that are unique to the skills and knowledge applied by competent industry workers:

Unit title	Unique skills and knowledge
Manipulate fabrics to create new finishes (MSTAT5004)	This unit applies to individuals who use manipulation techniques for design effects on textile products.
Dry clean garments with special treatment requirements (MSTDC3006)	This unit applies to individuals who determine the requirements and dry clean garments that require special treatment and handling, such as leather, suede, wedding gowns and vintage clothing.
Block and shape millinery by hand (MSTML2007)	This unit applies to individuals who perform blocking and shaping processes of millinery by hand and includes selecting and, where applicable, modifying the block.

3.13.2. Drivers of workforce dynamics

New and emerging skills

The rapid increase in the repair, reuse and recycling of textiles is predicted to have a significant impact on the Textile, Leather, Clothing and Footwear industries, including the development of new skills and changing workforce requirements.⁵⁵ A major research program conducted by Monash University concluded that there is a strong need for investment in fashion and textiles education and upskilling programs to build knowledge and capacity for implementing responsible and sustainable industry practices.⁵⁶

International competition

The leather and leather substitute product manufacturing sector has been negatively impacted as buyers further down in the supply chain, including wholesalers and retailers, have switched to lower cost imports.

To compensate, it is expected that local manufacturers will attempt to reduce operating costs with investments in new technologies.⁵⁷ This may in turn lead to an increased demand for higher skilled workers but a reduction in demand for lower skilled workers.

Changing consumer preferences

There are competing consumer trends within different markets that impact on the leather footwear manufacturing industry. On one hand, there is an increasing preference for non-leather materials in footwear, which requires different manufacturing approaches and labour skills profiles.⁵⁸ This will likely have flow-on impacts on the Natural Textile Manufacturing Synthetic Textile Manufacturing industries.

On the other hand, other consumer segments are increasingly purchasing high-quality and, in particular, handmade leather shoes, which is likely to grow the size and profitability of the domestic leather footwear manufacturing sector and lead to higher demand for specialised leatherworking skills.⁵⁹

Labour shortages

The National Skills Commission's 2022 Skills Priority List data shows national shortage of Screen Printers, and a strong future demand for workers for numerous occupations.

Textile, Leather, Clothing and Footwear Manufacturing and Services Summary

Workforce challenges

- The impact of consumer preferences and competition on workforce composition and skills needs.

Key evidence gaps

- Skills Insight are in establishment phase with stakeholders in these industries and are currently working to identify evidence gaps.

Workforce planning priorities

- Review qualifications relating to the footwear, leather production and millinery sectors, which were not updated as part of the previous qualification reform process (and are currently non-compliant). **(3a)**