# A Changing Workforce

## Opportunities and challenges for shaping the future textiles, clothing and footwear industry

Skills Insight

TextileWorks

Skills Insight acknowledges that First Nations peoples have been living on and caring for Country for thousands of years.

This is respected in our values and the way we work.

TextileWorks, a part of ForestWorks, is providing support for the management of this JSC project as part of their collaborative partnership with Skills Insight. ForestWorks has an enduring and strong connection working with the forestry, timber, paper, fibre and furnishing industries and have been engaged by Skills Insight to deliver this project in partnership.

JSC Jobs and Skills Council
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# Executive summary

This report presents the findings and recommendations of the Skills Insight Textiles, Clothing and Footwear Workforce Insights Project.

TextileWorks, a part of ForestWorks, provided support for the management of this JSC project as part of their collaborative partnership with Skills Insight. The project sought to identify the key skills and workforce development challenges affecting the textiles, clothing and footwear (TCF) industry in the post-COVID period and the potential opportunities. The COVID-19 pandemic significantly disrupted global and local supply chains, closed offshore facilities, increased freight costs, cancelled orders, and shifted consumer demand. While these impacts were severe, they also accelerated structural changes already underway in the TCF industry.

Before the pandemic, the Australian industry was restructuring with offshore operations replacing traditional TCF manufacturing, new supply chains emerging, and changing demand for skills. Due to these changes, the contemporary TCF industry is dominated by boutique manufacturers focusing on niche and specialised market segments. While these companies have an ongoing need for traditional TCF skills, their skill requirements are changing due to changes in business operations, technology, work practices, consumer demand and environmental regulations.

The vocational education and training (VET) sector has struggled to keep pace with these changes. Despite updates to the MST Training Package, providers face challenges in delivering flexible training, recognising existing skills, offering apprenticeship and traineeship pathways, and meeting demand in areas with small numbers of TCF workers, particularly in regional communities. Compounding this, the industry is faced with an ageing workforce and difficulties attracting new entrants, especially younger people.

If these trends continue, the industry will contract further, leading to job losses and an increasing reliance on offshore production. However, this is not inevitable. The consultations conducted for this study revealed a consensus among companies, trade unions, and the training sector on the need to restore TCF manufacturing in Australia. There is a clear opportunity - but urgent, coordinated action is required.

Readers are strongly encouraged to refer to Section 7: Recommendations, which outlines the ten key actions identified to support a skilled, sustainable and competitive TCF workforce.

**Summary of Recommendations**

The project has identified ten key recommendations to support a skilled, sustainable and competitive TCF workforce:

1. **Map TCF skills and occupations** to identify current and future needs and inform training delivery
2. **Enhance the flexibility** of the MST Training Package by reassessing the volume/complexity of existing qualifications
3. **Recognise existing workforce skills** through improved Recognition of Prior Learning processes

4. **Build the skills of the current workforce** with targeted, inclusive, and flexible training options
5. **Expand apprenticeship/traineeship delivery** tailored to the TCF sector
6. **Build sustainable capacity in critical occupations** to address labour shortages
7. **Revise occupational classifications** (OSCA) based on updated skills and roles
8. **Strengthen trainer and assessor capability** through targeted research and strategies
9. **Support industry-led networks and partnerships** via pilot Hubs to boost training uptake
10. **Attract new entrants** by developing pathways and promotional campaigns targeting young people.

Delivering on these recommendations will require significant investment. Skills Insight, as the responsible Jobs and Skills Council (JSC), has a key role in advocating for this work. However, implementation will also require strong commitment and investment from industry and government stakeholders.

For further detail on implementation priorities, responsible organisations, and potential funding approaches, refer to Section 8: Implementing the Recommendations. This section provides initial guidance on recommended timelines and identifies key stakeholders for each recommendation.

# 1. Introduction

## 1.1 Project overview

This report presents the findings and recommendations from the Skills Insight Textile, Clothing, and Footwear Workforce Insights Project. ForestWorks provided support for the management of this JSC project as part of a collaborative partnership with Skills Insight to identify the key skills and workforce development challenges affecting the industry in the post-COVID period.

In 2018, a Skills Forecast prepared by the former Industry Reference Committee of Innovation and Business Skills Australia[1] (IBSA) noted that offshore operations have replaced mainly traditional textiles, clothing and footwear (TCF) manufacturing in Australia. This report highlighted that the domestic TCF industry primarily comprises boutique manufacturers focusing on niche and specialised market segments. Many of these TCF businesses were significantly affected by the COVID-19 pandemic. According to a 2020 Australian Fashion Council (AFC) and McKinsey & Company survey, two-thirds of industry members reported they were unlikely to recover from the pandemic. Furthermore, a shift in vocational education and training (VET) funding away from TCF manufacturing to other areas, such as fashion design, has limited the capacity of key sectors of the industry to recruit and train new entrants. It has also limited their ability to invest in retraining and upskilling the existing workforce.

This situation comes at a time when the domestic industry faces considerable skill challenges, including an ageing workforce, a shortage of skilled trade and technician-level personnel, the need to adopt new manufacturing technologies to remain competitive, and a reluctance among school leavers and younger workers to pursue careers in the industry.

Due to these developments, the existing Industry Reference Committee work plan, published before the pandemic in 2018, needs reconsideration, and the MST Training Package needs revision.

This report seeks to inform this process by identifying the key changes impacting the TCF industry post-COVID, highlighting the TCF industry's current and emerging skill and workforce development priorities and providing recommendations on training product development and review activities.

## 1.2 Project scope

This Skills Insight report focuses on skill and workforce development priorities in the following sectors of the Australian TCF industry:

- Textile manufacturing
- Fashion and apparel manufacturing
- Footwear production
- Leather manufacturing
- Dry cleaning and laundry services

1 https://ibsa.org.au/wp-content/uploads/2017/04/Textiles-Clothing-Footwear-MST-ISFPSW-May-2018.pdf

- Clothing and Footwear Repairs and Alterations services.

This report does not cover textile-related retailing, offshore manufacturing or other industries that use textiles, such as furnishings, furniture, and vehicle production.

## 1.3 Methodology

The methodology for this research project involved seven key stages. These are outlined below.

1. Establish project communication strategy – a webpage was created to enhance communication and consultation with key stakeholders. It provided background information about the project, details on research activities, access to survey instruments, and guidance on how to participate in the project.
2. Conduct desktop review – a targeted review of existing industry reports, research papers, and relevant studies on workforce trends and skill development needs across the TCF industry was undertaken.
3. Consult with key stakeholders – the results of the desktop review informed face-to-face and online consultations on skill and workforce development. Sixty-four consultations were conducted, consisting of 52 face-to-face and 12 online meetings. These consultations took place across the States and Territories and involved representatives from industry, government, and education and training associated with the different sectors of the TCF industry. A list of the organisations consulted throughout the project can be found in Appendix 1.
4. Conduct industry surveys – two industry surveys were conducted. The first was designed to gather information and the views of companies, industry organisations and trade unions on business operations, employment patterns, labour shortages, and skills and training needs. The second survey was directed at training providers and was designed to gather information about existing nationally recognised qualifications and how these align with current and emerging industry skill requirements. This survey highlighted training delivery challenges, emerging skill needs and gaps in the current MST Training Package. Twenty-nine organisations responded to the industry survey, and three responded to the training provider survey. A list of respondents can be found in Appendix 2.
5. Validate the study's outcomes – a subject matter expert working group (SMEWG) comprising a cross-section of industry stakeholders was formed to validate the outcomes and recommendations of the study. The SMEWG membership is listed in Appendix 3. This group met to provide feedback on the project. The schedule of SMEWG meetings is listed in Appendix 4.
6. Conduct further consultations – in response to stakeholder requests, ForestWorks called for individuals and organisations to provide written submissions to the project team. In addition, the project team established an online workshop for Registered Training Organisations (RTOs) involved in delivering MST qualifications to discuss matters related to the existing MST qualifications and the delivery of nationally recognised training. This workshop was conducted on 10 December 2024. Before the workshop, the project team developed a discussion paper to guide the workshop participants

[see Appendix 5]. This focused on five key matters, namely: (1) Training provider challenges, (2) Attracting younger people and new entrants for the current and next-generation workforce, (3) Developing training programs for future-proofing skills, (4) Recognising portable skills for mobility, and (5) Training challenges. A list of the RTOs who participated in the online workshop is provided in Appendix 6.

7. Prepare the project report – the project team used the outcomes of the desktop review, surveys, and consultations to inform the draft report and recommendations. The team produced a draft report and recommendations, which was submitted to the SMEWG, an industry-wide stakeholder forum and other stakeholders for comments. The draft recommendations were advertised for public comment on the project landing page for a two-week period. The final version of the report was prepared considering, as appropriate, feedback received from the SMEWG, ForestWorks, and Skills Insight.

## 1.4 Limitations of data used in this report

The Australian textile, clothing and footwear (TCF) industry is undergoing significant transformation. To remain competitive and relevant, businesses are increasingly embracing sustainability principles, adopting new technologies, and investing in skills development. Among these shifts, a notable trend is the growing emphasis on sustainability, with many companies implementing circular economy practices and technologies that support Australia's transition to a net-zero economy.

This sustainability focus is accompanied by renewed interest in local manufacturing. In response to global supply chain disruptions and rising consumer demand for ethically produced goods, many Australian businesses are exploring opportunities to invest in domestic production. This shift has the potential to reduce environmental impact, strengthen the local economy, and revitalise elements of Australia's TCF manufacturing sector – creating new employment opportunities, particularly in skilled occupations.

However, these industry trends may not be fully captured in national labour force statistics published by the Australian Bureau of Statistics (ABS). The aggregated nature of ABS data can obscure the growing momentum behind local, high-quality TCF production. Moreover, it may not reflect emerging roles or accurately attribute relevant occupations to the TCF sector. As a result, current statistics may underrepresent the scale of employment and economic activity within the contemporary TCF industry.

# 2. TCF industry – structure

The textile, clothing, and footwear industry is a comprehensive network of sectors, businesses, and production processes. This network encompasses companies that work together to create and deliver essential products for everyday life, including natural and specialised textiles, leather, garments, footwear, and related services such as laundry, repairs, and alterations of garments and footwear.

This section of the report provides an overview of the Australian TCF industry, highlighting its key sectors, the types of businesses it includes, its occupational structure, the demographics of the workforce, the industry supply chain, and the main stakeholders involved.

## 2.1 TCF industry - key sectors

The key sectors within the TCF industry are:

- Textile Manufacturing
- Fashion and Apparel Manufacturing
- Leather Manufacturing
- Footwear Production
- Dry Cleaning and Laundry Services
- Clothing and Footwear Repairs and Alterations Services.

### 2.1.1 Textile Manufacturing

This sector includes a variety of activities, ranging from the production of raw materials to the creation of finished fabrics. It involves processing natural and synthetic fibres to produce a wide array of textile products. Key activities within the sector comprise spinning, weaving, knitting, dyeing, and finishing textiles. These processes transform raw fibres into fabrics utilised in fashion, household items, and technical applications. The key subsectors are:

- Cut and Sewn Textile Product Manufacturing
- Textile Finishing and Other Textile Product Manufacturing
- Textile Floor Covering Manufacturing
- Rope, Cordage, and Twine Manufacturing
- Natural Textile Manufacturing
- Synthetic (specialised) Textile Manufacturing
- Cotton Ginning
- Wool Scouring.

Synthetic (specialised) textile manufacturing is focused on producing fabrics primarily made from synthetic fibres. These fabrics are tailored for specific automotive, marine, architecture, agriculture, transport, mining, and healthcare applications. This category also includes outdoor and indoor covers, shade sails, and technical fabrics designed to meet defined performance criteria, such as durability and resistance to environmental factors. Examples of specialised textiles include:

- geotextiles for construction and engineering
- protective textiles for safety, including fire, chemical, and extreme temperature protection
- medical textiles for healthcare, such as wound care items, bedding, and surgical gowns
- agricultural textiles for crop protection, including shade and greenhouse covers
- automotive textiles for vehicle interiors, including seat covers, carpets, and seatbelt webbing
- marine textiles used in boats and upholstery, including boat covers, sail cloth, and marine upholstery
- canvas and shade products.

### 2.1.2 Fashion and Apparel Manufacturing

This sector focuses on designing, producing, and distributing clothing and accessories, including hats (millinery), for domestic and export markets. Many manufacturers specialise in creating high-end luxury items using premium fabrics and skilled craftsmanship. Additionally, there is a growing movement toward more sustainable and ethical practices, with many companies prioritising environmentally friendly materials, circularity principles and fair labour practices.

Key subsectors include:

- Clothing Manufacturing
- Knitted Product Manufacturing
- Fashion and Textile Design
- Millinery Design and Manufacturing.

### 2.1.3 Leather Manufacturing

This sector involves the processing of animal hides and skins into leather products. It encompasses tanners, manufacturers of leather goods, and wholesalers. The leather sector is closely connected to the footwear and textile manufacturing industries as they share similar production processes and supply chains. Leather is a vital material for many manufacturers, while leather producers frequently incorporate textile products into their production processes.

### 2.1.4 Footwear Production

This sector encompasses the design, production, and sale of various types of footwear, including fashion, sports, and workwear. While most shoes sold in Australia are imported, there is ongoing demand for Australian-made products, particularly in high-end fashion and specialised markets catering to the construction, mining, emergency services, and defence industries.

### 2.1.5 Dry Cleaning and Laundry Services

This sector provides essential textile cleaning services for individuals and businesses, serving retail and industrial needs. It encompasses the cleaning, pressing, and finishing of textiles such as clothing and linen. Retail services are designed for individuals and small businesses, while industrial services cater to larger operations, including hotels, restaurants, and hospitals.

Businesses that handle high volumes of commercial cleaning utilise specialised equipment and processes tailored for specific cleaning, sterilisation, and ironing requirements. Many also offer additional services like alterations, repairs, and pressing.

### 2.1.6 Clothing and Footwear Repairs and Alterations

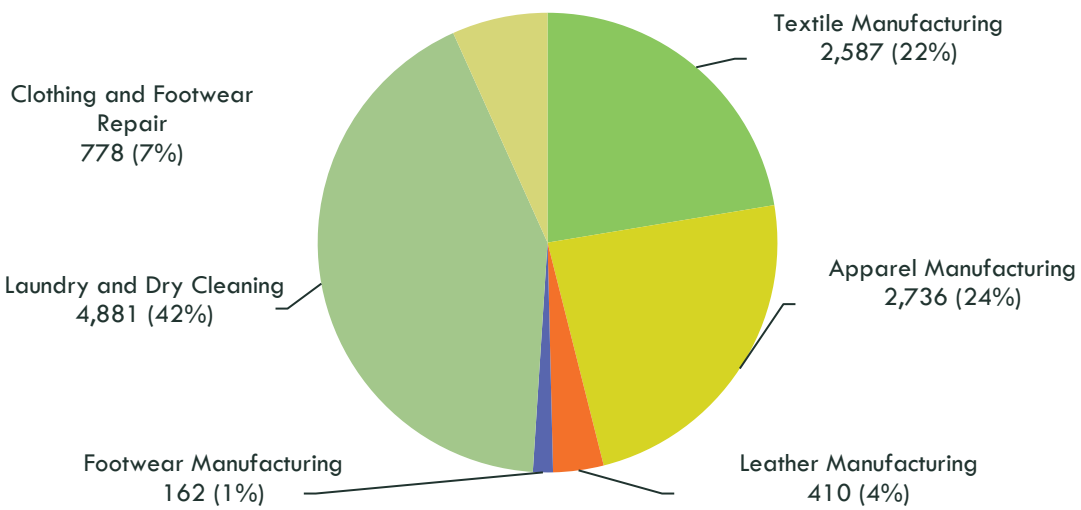
This sector includes businesses that specialise in repairing and altering garments and footwear. Services range from basic repairs to complete restyling, transforming older items into new clothing.

A more detailed discussion of these sectors may be found in Section 5 of this report.

## 2.2 TCF industry - business profile

In 2023, the TCF industry comprised 11,500 businesses. As shown in Figure 2.1, the most significant sectors in terms of the number of companies are Dry Cleaning and Laundry Services (42%), Apparel Manufacturing (24%) and Textile Manufacturing (22%). Almost 60% of these businesses were non-employing, about 30% had between 1 and 4 employees, and just over 10% employed between 9 and 20 people.

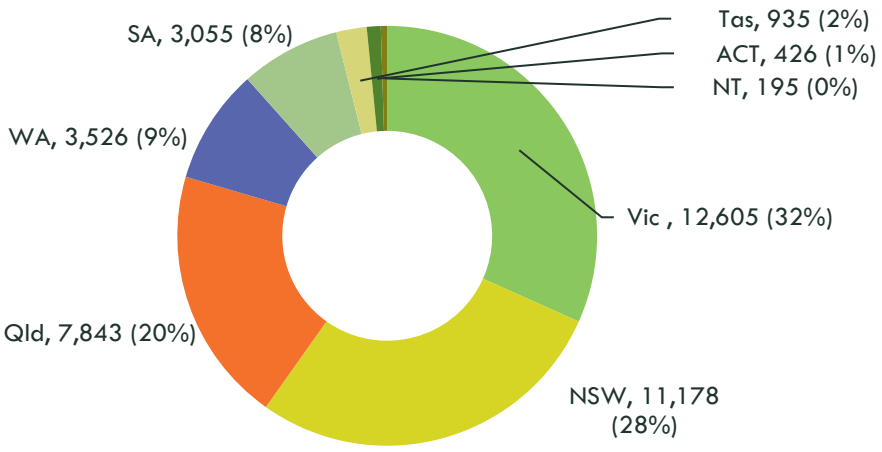
**Figure 2.1 TCF businesses by sector 2023**




*Source: ABS, 2023, 8165.0 Counts of Australian Businesses, Entries and Exits, June 2019 to June 2023*

Most of these businesses are in New South Wales, Victoria, and Queensland, primarily in major urban areas. Some operate in regional areas, particularly in Victoria, while a smaller number are in South Australia, Western Australia, Tasmania, the ACT, and the NT (see figure 2.2).

**Figure 2.2 TCF employment by state in 2021**




*Source: Census of Population and Housing, 2021, TableBuilder*

## 2.3 TCF industry - occupational profile

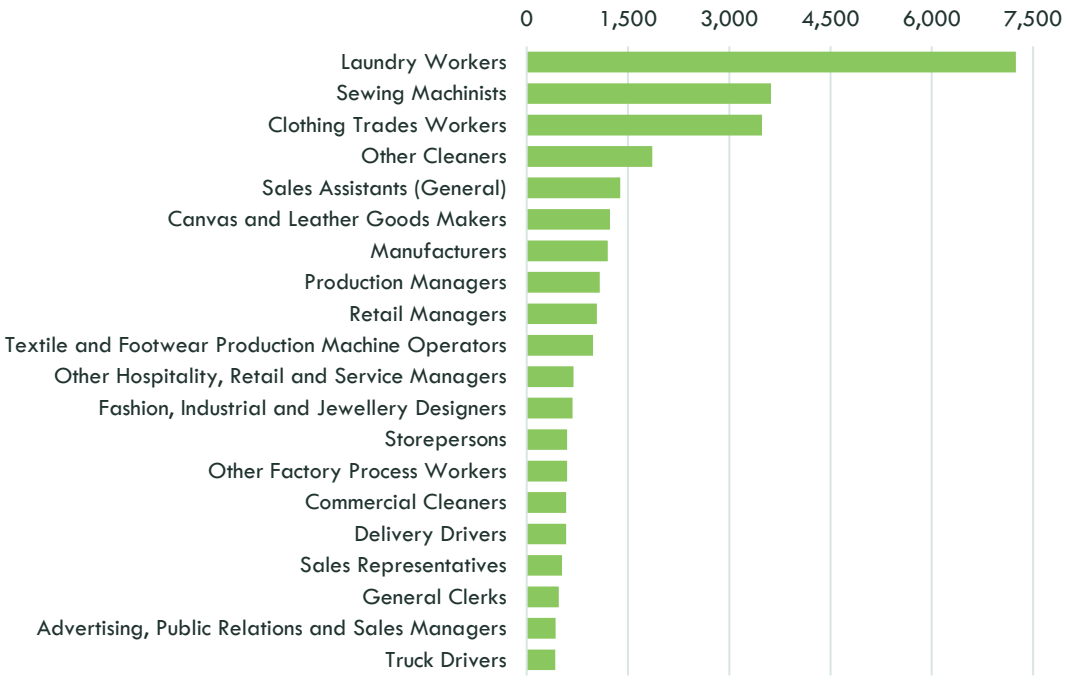
The textile, clothing, and footwear industry encompasses a wide range of occupations, reflecting the diverse skills necessary to maintain its operations. These roles range from manual and technical positions to managerial and customer service roles, covering various levels of expertise and responsibility – from entry-level to advanced technical and managerial capabilities.

As of 2021, approximately 40% of the TCF workforce, or about 16,600 individuals, held positions specific to TCF production. The remaining 60% were engaged in essential support functions, many of which were common across various industries.

Specialised roles are fundamental to the TCF industry and involve manual, technical, and creative skills. As shown in Figure 2.3, the largest employment groups are laundry workers, followed closely by sewing machinists and clothing trades workers, including tailors and dressmakers. Other specialised occupations include canvas and leather goods makers, textile mechanics, footwear production machine operators, and fashion and industrial designers.

Support roles that facilitate industry operations and employ significant numbers of people include general sales assistants, production managers, and retail managers, each employing thousands. These are followed by storepersons, commercial cleaners, delivery drivers, sales representatives, general clerks, and managers in advertising, public relations, and sales.

**Figure 2.31 Key occupations in the TCF industry by employment in 2021**




*Source: Census of Population and Housing 2021, TableBuilder, viewed 7 June 2024, <https://tablebuilder.abs.gov.au>.*

Specialised roles within the textile, clothing, and footwear industry are also present in non-TCF sectors, such as building maintenance, industrial cleaning, aged care, hospitals, clothing retail, and accommodation. In 2021, approximately 42,900 individuals were employed in these roles nationwide. Of these, 40% (16,600 individuals) were employed in TCF sectors, while 50% (22,000 individuals) worked in other industries.

### 2.3.1 Specialised TCF roles

The key specialised TCF roles are listed below.

#### 2.3.1.1 Textile manufacturing

Key roles in textile manufacturing include production assistants, machine operators, dyers, and designers.

Production assistants provide essential support in the manufacturing process, ensuring smooth operations and addressing immediate needs on the production floor.

Machine operators specialise in handling specific machinery for processes such as yarn production, weaving, dyeing, and finishing. Their skills in operating complex machinery are essential for maintaining high-quality output and efficiency.

Textile designers and technologists, on the other hand, play a critical role in innovation and development. They create new fabric designs and improve production techniques to meet evolving consumer preferences and industry standards.

#### 2.3.1.2 Fashion and apparel manufacturing

Apparel manufacturing relies heavily on skilled sewing machinists, pattern makers, and fashion designers.

Sewing machinists play a significant role in garment production, meticulously assembling pieces to create finished products.

Pattern makers and graders ensure that designs are accurately translated into wearable garments, which is essential for maintaining consistency and quality in mass production. They use advanced technologies, such as size-fit CAD (computer-aided design) and 3D body scans, to ensure a quality fit and minimise waste.

Fashion designers bring creativity and vision to the industry, driving trends and introducing new styles that keep the market vibrant and responsive to consumer demands.

#### 2.3.1.3 Leather manufacturing

The leather manufacturing sector employs people as tanners, leather goods machinists, and leather goods designers.

Tanners and machine operators are responsible for processing raw hides into finished leather, demanding precision and expertise to ensure the final product's quality and durability.

Leather goods designers add value by crafting innovative designs, incorporating unique styles and functional features that appeal to a broad consumer base.

#### 2.3.1.4 Footwear production

In footwear manufacturing, occupations range from footwear-making cutters and finishers to custom-made footwear makers and production managers.

Footwear-making cutters and finishers are skilled trades workers who create and assemble footwear components, ensuring each piece meets stringent quality standards. Custom-made footwear makers cater to niche markets requiring specialised footwear, such as medical-grade footwear.

Production managers oversee the entire manufacturing process, coordinating activities and optimising production efficiency to ensure the timely delivery of high-quality products.

#### 2.3.1.5 Dry-cleaning and laundry services

Specialised roles in the laundry and dry-cleaning services sector include laundry operators, dry cleaners, spotters and supervisors. These professionals provide essential services, ensuring the proper care and maintenance of textiles for individual consumers and businesses, including those in hospitality and healthcare. They are skilled in handling different fabrics and stains and possess extensive knowledge of cleaning techniques and machinery.

#### 2.3.1.6 Clothing and Footwear Repairs and Alterations

Clothing and footwear roles include dressmakers, tailors, sewing machinists, shoemakers, and shoe repair technicians. These professionals perform various tasks such as mending tears, altering fits, replacing zippers, resoling shoes, and restoring worn or damaged items. Their work requires attention to detail, proficiency with sewing machines and various hand tools, and a strong understanding of fabric and leather properties.

## 2.4 TCF industry - workforce profile

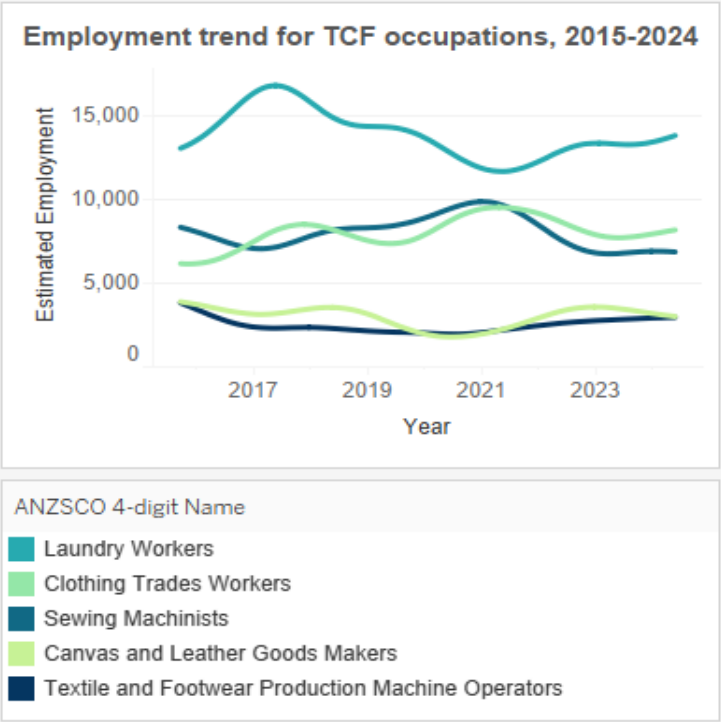
The TCF industry employs a diverse workforce. The following section outlines the key characteristics of this workforce and the implications for skill and workforce development.

### 2.4.1 Employment size

In 2021, 39,763 people were employed in the TCF industry. As indicated in Figure 2.4, the sector with the most employees was Laundry and Dry-Cleaning Services, with 15,512 people. This was followed by Clothing Manufacturing, with 9,572 employees, and Cut-and-Sewn Textile Manufacturing, with 4,492 employees.

As shown in Figure 2.4, the TCF industry experienced significant changes in employment due to COVID-19. Overall, employment in the TCF industry increased by 4% between December 2021 and December 2023. However, this trend was uneven. During the pandemic, the employment of sewing machinists and clothing trades workers rose. In the post-COVID period, however, employment in these roles declined or saw only minimal increases. Most other occupations remained relatively stable. Conversely, some occupations, such as Laundry Workers, declined significantly during the pandemic.

**Figure 2.4 Employment trends for TCF occupations 2015-2024**




*Source: Jobs and Skills Australia, Nowcast of Employment by Region and Occupation (NERO), 2024*

### 2.4.2 Full and part time work

As shown in Figure 2.5, 23.8% of employees in the TCF industries work on a part-time basis. Women are more likely to work part-time than men. In 2024, part-time male workers comprised 5.1% of the total TCF workforce, whereas part-time female workers comprised 18.7% of the total TCF workforce.

**Figure 2.5 TCF Industry – Full and part time employment by gender 2024**

| Indicator | | Total [000s] | % of total employed |
|---|---|---|---|
| Employed | Total | 33.1 | 100.0 |
| | Male | 14.7 | 44.4% |
| | Female | 18.5 | 55.8% |
| Employed Full Time | Total | 25.2 | 76.1% |
| | Male | 13.0 | 39.2% |
| | Female | 12.2 | 36.8% |
| Employed Part Time | Total | 7.9 | 23.8% |
| | Male | 1.7 | 5.1% |
| | Female | 6.2 | 18.7% |

*Source: Labour Force Australia – Table 6 Employed persons by industry subdivision of main job (ANZIC) and sex.*

### 2.4.3 Gender

Most workers in the TCF industry are female, but gender representation varies across the subsectors. In 2024, 55.8% of the TCF workforce was female, while 44.4% was male – see Figure 2.5. Women dominate the workforce in specific sectors, such as Clothing Manufacturing and Knitted Product Manufacturing, with 76% and 59% representation rates, respectively. Similarly, women comprise 63% of the workforce in Textile Finishing and Other Textile Product Manufacturing.

Conversely, male dominance is evident in sectors like Wool Scouring and Synthetic Textile Manufacturing, where male participation rates are 75% and 69%, respectively. Laundry and Dry-Cleaning Services exhibit an equal gender split, each at 50%. Footwear Manufacturing also shows balanced gender representation, with 52% female and 48% male workers.

### 2.4.4 First Nations people

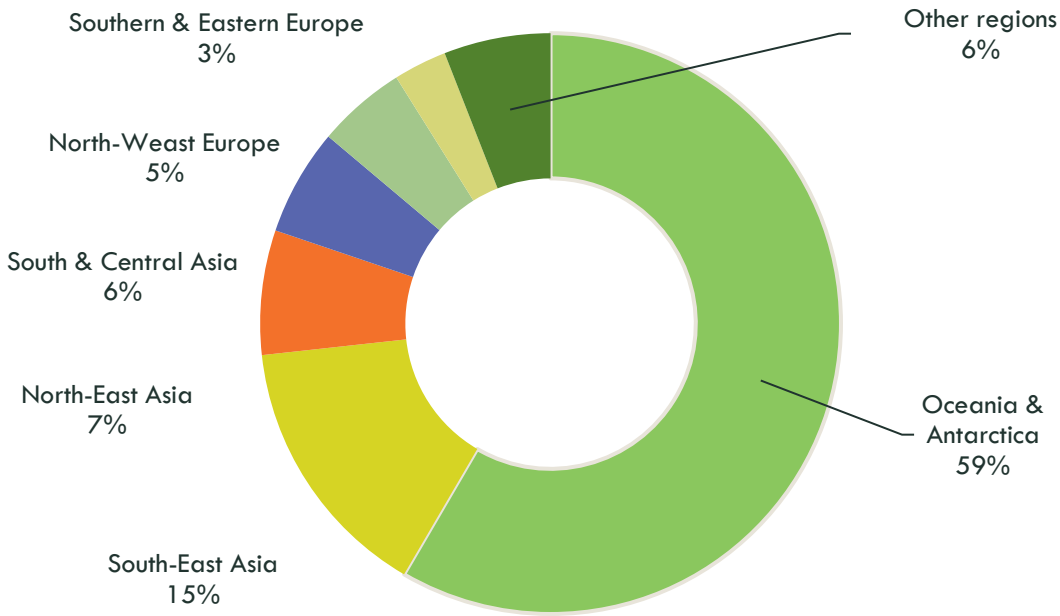
In 2021, First Nations people comprised only 1% of the workforce in the TCF industry. However, representation varies across the sectors. Cotton Ginning has the highest participation rate among First Nations people, at 6%. Following this, Synthetic Textile Manufacturing, Leather Tanning, Fur Dressing, and Leather Product Manufacturing each have a 3% representation. First Nations people form 2% and 1% of the workforce in the Dry-Cleaning and Laundry Services and Footwear Production sectors, respectively. In contrast, Knitted Product Manufacturing, Natural Textile Manufacturing, Rope, Cordage and Twine Manufacturing, and Wool Scouring have no First Nations representation.

The underrepresentation of First Nations people in the TCF industry highlights the need for targeted initiatives to improve employment opportunities. Potential strategies include focused recruitment efforts, culturally sensitive workplace practices, and partnerships with Indigenous communities to promote training and employment within the sector.

### 2.4.5 Culturally and linguistically diverse (CALD) people

In 2021, 41% of the TCF workforce came from culturally and linguistically diverse backgrounds (see Figure 2.6). The largest portion of the workforce (59%) comprises people born in Australia. People born in South-East Asia comprise 15% of the workforce, followed by those born in North-East Asia (7%) and South and Central Asia (6%).

**Figure 2.6 Proportion of CALD people in the TCF industry workforce in 2021**




*Source: Census of Population and Housing, 2021, TableBuilder*

Some sectors of the TCF industry have high concentrations of workers who were born outside Australia. For example, 15% of footwear manufacturing workers were born in South-East Asia.

This highlights the importance of cultural and linguistic diversity within the TCF industry. This presents opportunities and challenges, emphasising the need for inclusive workplace practices, language support programs and practical career guidance. As the demand for higher-level employability skills increases, individuals from CALD backgrounds may face disadvantages in accessing and participating in the training required for upskilling and job mobility.

### 2.4.6 Age distribution

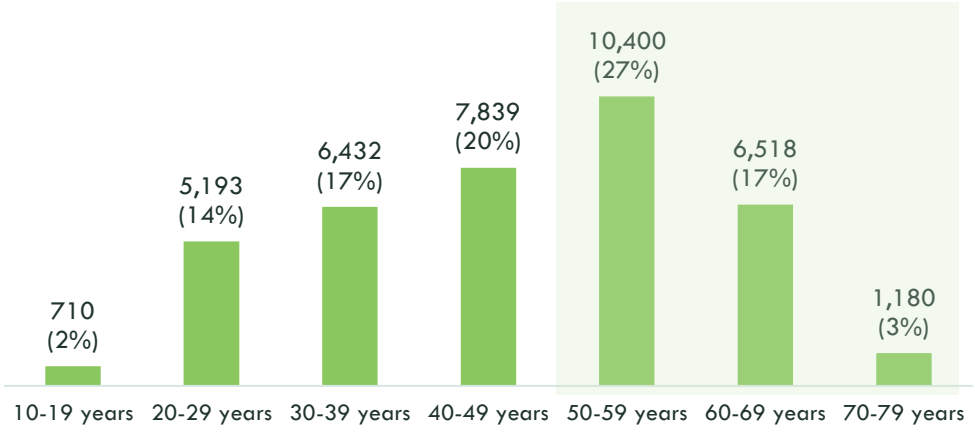
In 2021, 47% of the textile, clothing, and footwear industry workforce, or 18,098 people, were aged between 50 and 79 – see Figure 2.7.

The largest segment of the workforce is in the 50-59 age group, making up 27% of the total, followed by the 40-49 age group at 20%. Additionally, the 60-69 age group accounts for

17%, while the 70-79 age group represents 3%. This demographic trend suggests that many experienced workers will likely retire in the coming years. Therefore, there is an urgent need for targeted recruitment, training, and retention initiatives aimed at younger people to ensure the industry's long-term operational stability.

Currently, the TCF industry has a relatively low number of younger workers. The 20-29 age group comprises 14% of the workforce, while the 15-19 age group constitutes only 2%. This may be due to several factors, including the industry's lack of appeal to young people, the availability of training and education programs, and the absence of targeted information on career options.

**Figure 2.7 TCF industry workforce by age groups in 2021**



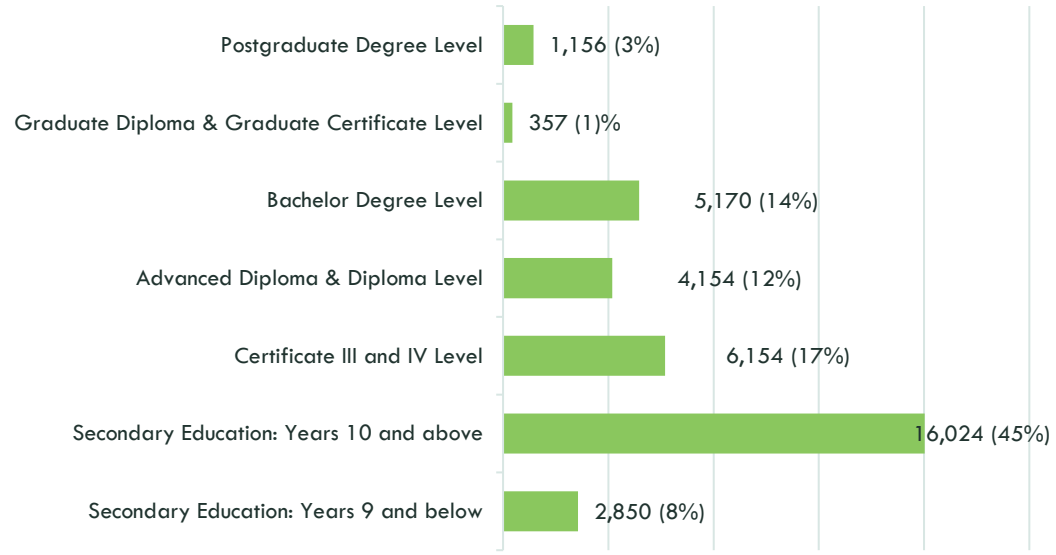

*Source: Census of Population and Housing, 2021, TableBuilder*

If this trend continues, the industry may experience further skill shortages, particularly as older workers retire.

### 2.4.7 Education levels

Figure 2.8 shows that 53% of workers in the TCF industry have secondary education as their highest educational attainment. This includes 45% who have completed Year 10 or above and 8% who have finished Year 9 or below.

**Figure 2.8 Highest education level of the TCF workforce in 2021**




*Source: Census of Population and Housing, 2021, TableBuilder*

17% of workers possess a Certificate III or IV, which suggests a relatively low level of vocational training within the industry. Additionally, 12% of the workforce holds Advanced Diplomas or Diplomas, reflecting a moderate level of higher technical and specialised qualifications.

To meet industry demand for higher technical skills, there is a pressing need to increase investment in vocational and educational training programs in the TCF industry, especially among the existing workforce.

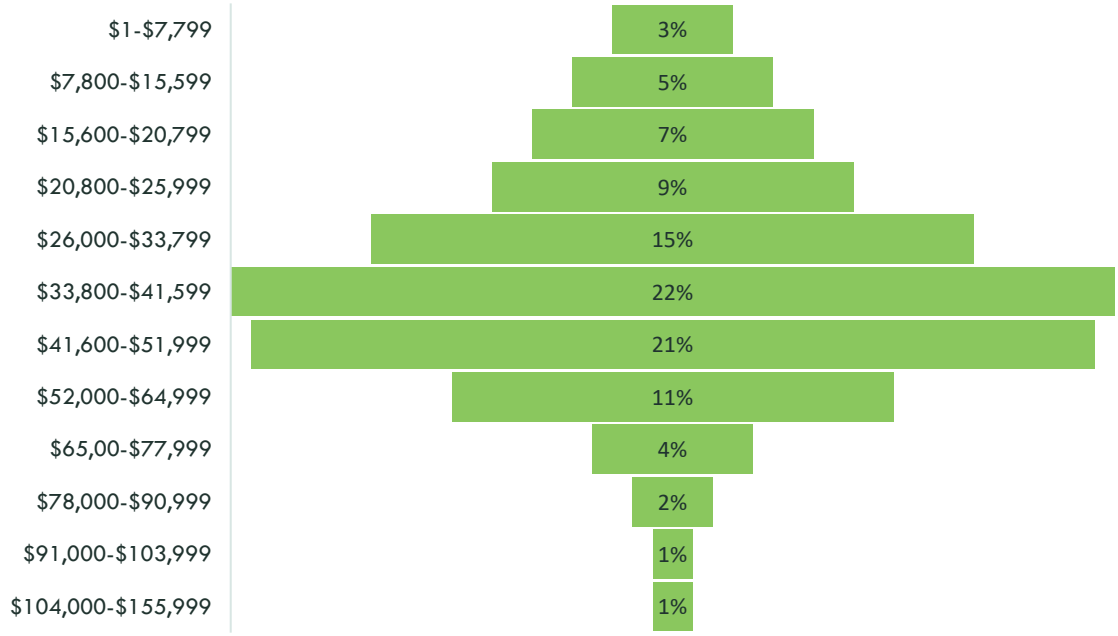
### 2.4.8 Income levels

Figure 2.9 shows that most TCF industry workers earn lower to middle incomes. In 2021, 81% of the TCF workforce had an annual income below $51,999, which is less than the median personal income of $54,890 for all workers in Australia in 2020-2021.

Income levels vary significantly across the different sectors in the TCF industry. For example, in Knitted Product Manufacturing, 41% of the workforce earns between $33,800 and $41,599, whereas in Clothing and Footwear Repair, 37% earn between $15,600 and $33,799.

The prevalence of lower to middle-income earners in the TCF industry may negatively impact workforce attraction, retention, and job satisfaction.

**Figure 2.9 Income level of the TCF workforce in 2021**

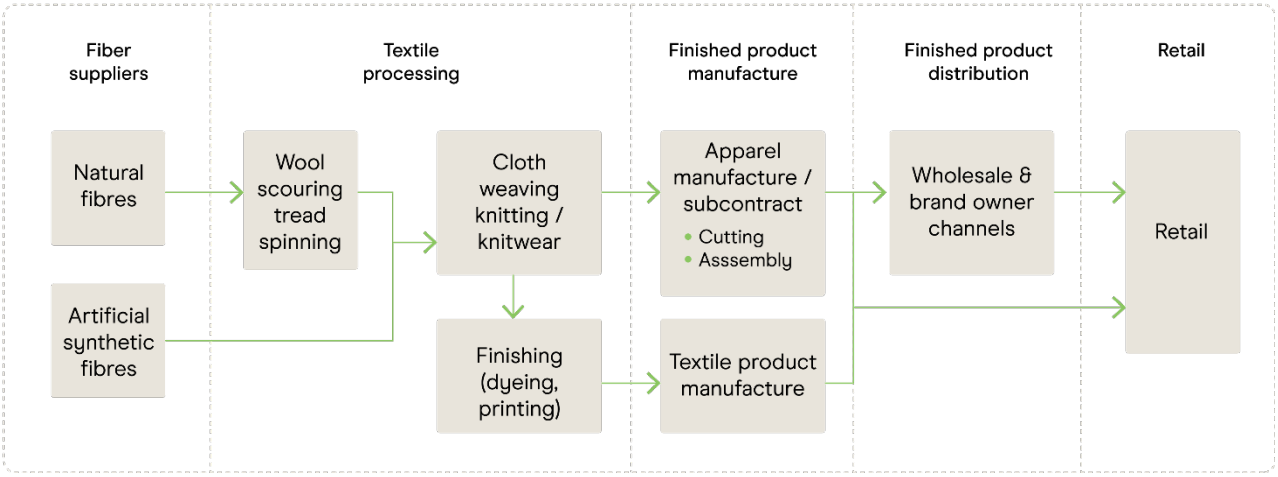



*Source: Census of Population and Housing, 2021, TableBuilder*

## 2.5 TCF industry - supply chain

Over the past forty years, global textile, clothing, and footwear production capacity has shifted to developing economies, especially China. This shift is due to the expansion of the domestic TCF market in China, Chinese government policies aimed at boosting TCF export production, and significant foreign investment in the Chinese TCF industry. Much of this investment has come from retailers, designers, wholesalers, and manufacturers in developed countries looking for lower production costs. As a result of these changes, the TCF supply chain has evolved from a local to a global one.

**Figure 2.10 – Clothing and textile product supply chain**




*Source: Green, R. Building innovative capacity: Review of the Australian textile, clothing and footwear industries, NCVER, Commonwealth of Australia, 2008.*

This supply chain, illustrated in Figure 2.10, involves all the processes in moving TCF products and services from original producers to end consumers. The aim is to improve the links between firms in the chain and increase supply efficiency to the end consumer. This is done by removing bottlenecks, minimising inventory holding time, and sharing information to better match supply capacity with demand.

Over time, many key steps in the Australian clothing and textile product supply chain have moved offshore, and the Australian TCF industry has become increasingly import-dependent. As a result, the chain was severely disrupted during the COVID-19 pandemic, leading to supply shortages, company closures, and job losses.

While the fundamentals of the clothing and textile products supply chain arrangements are unlikely to change, the following recent developments may produce shifts in the model, which may have positive implications for Australian TCF manufacturers:

1. the supply chain disruptions associated with the pandemic have led some local TCF manufacturers to source local products to reduce supply chain risks
2. adopting circularity and sustainability principles may lead manufacturers to emphasise sourcing local, traceable products and reusing and repurposing textile waste
3. changing consumer preferences for sustainable, high-quality Australian-made products may lead to a shift towards onshore production
4. international regulation requirements for brands to have visibility over their supply chains is increasing brand appetite to manufacture locally
5. the launch of Seamless, an Australian product stewardship scheme, will require manufacturing and remanufacturing skills, including repair and alteration skills, to support the move to a circular clothing economy.

These developments could reshape the supply chain and reduce the reliance on imported products. For this to happen, however, Australia's domestic TCF industry must have the capacity and skills base to respond to changes in demand.

## 2.6 TCF industry – key stakeholders

The key TCF industry stakeholders in each State and Territory are shown in the TCF Industry Stakeholder Map – see Appendix 7.

# 3. TCF industry – economic challenges and opportunities

The Australian textile, clothing, and footwear industry faces unique macroeconomic challenges stemming from domestic and global factors. These challenges affect Australian businesses' competitiveness, productivity and sustainability. The ensuing section of this report outlines the key macroeconomic challenges impacting the Australian TCF industry.

## 3.1 International competition

Australia imports a significant portion of its textiles, clothing, and footwear, with major suppliers including China, Bangladesh, and Vietnam. This situation creates a competitive landscape where Australian manufacturers must compete against lower-cost production in these countries.

Countries with lower manufacturing costs, such as China and Vietnam, can produce textiles and footwear at significantly lower prices, making it challenging for Australian producers to compete in price-sensitive markets. This trend is particularly evident in the fast-fashion sector, where quick turnaround times and low prices are key drivers of consumer demand.

## 3.2 Skills shortages and diminished manufacturing capacity

Multiple industry reports have highlighted the significant and ongoing shortage of skilled workers in Australian textile, clothing, and footwear manufacturing. This shortage hampers the sector's ability to meet demand and innovate.

In Australia, the TCF industry faces skill shortages in all industry sectors, particularly in production and operational roles. Contributing factors to these shortages include a declining local manufacturing base, an ageing TCF workforce, limited participation in vocational training, and insufficient upskilling of the existing workforce.

The TCF sector has limited capacity to increase local production, as much of the nation's manufacturing capacity has been offshored to Asia. Even though there is predicted to be an increase in demand for Australian-made products, primarily driven by consumer preference for high quality, sustainably produced products, the industry may lack the capacity and skill base to meet this demand.

## 3.3 Workforce demographics

As discussed in section 2.4.6, Australia's textile, clothing, and footwear workforce is ageing. Approximately 9,600 workers are projected to retire between 2022 and 2027, followed by another 7,300 between 2028 and 2032. This will result in a significant loss of experience and skills, potentially worsening the shortage of skilled labour.

Additionally, the industry struggles to attract, train, and retain younger workers. The reasons for this are complex and include the industry's poor public perception, insufficient investment in training and development, a lack of industry-relevant training options, limited career prospects, and high workforce turnover.

Australia has relied on strong immigration flows, particularly from South-East Asia, to address the shortfall of workers and skills in the local textile, clothing, and footwear industry. Migrants from countries with strong textile and garment manufacturing traditions, such as Vietnam, Bangladesh, and China, have brought valuable skills to the Australian industry and have helped fill labour shortages in manufacturing and design positions. However, fluctuations in immigration policies or visa restrictions can disrupt this supply of workers, leading to labour shortages or increased recruitment costs.

## 3.4 Supply chain disruptions

The Australian TCF industry is heavily dependent on international supply chains. Disruptions such as the COVID-19 pandemic, shipping delays, and natural disasters can lead to stock shortages, factory closures, job losses and price increases for raw materials. For instance, disruptions in supply from key regions like China or Vietnam can directly impact Australian domestic manufacturers that rely on imported textiles and components.

Australia's location makes importing goods more expensive and time-consuming than in countries near significant production hubs. Rising freight and shipping costs - exacerbated by port congestion and limited shipping container availability - pose a particular challenge for the TCF industry, leading to higher costs for businesses and consumers.

## 3.5 Exchange rate fluctuations

Australia imports a significant portion of its textiles, clothing, and footwear products, making local businesses vulnerable to movements in currency exchange rates. When the Australian dollar is strong, the cost of imports decreases; conversely, a weak dollar can raise prices for imported goods. These fluctuations impact the profitability of domestic manufacturers and companies that rely on imported materials. Additionally, they affect the price competitiveness of Australian exports in international markets.

## 3.6 Economic uncertainty and consumer confidence

Australia's textile, clothing, and footwear industry is sensitive to changes in the broader economy, such as recessions or slowdowns in domestic consumption. During economic uncertainty, like the current cost of living crisis, consumers often cut back on discretionary spending. This reduction directly affects the demand for clothing, footwear, and household products, including floor and window coverings. Such impacts are especially notable during periods of high inflation or limited disposable income.

Additionally, Australian consumers are increasingly prioritising sustainable, high-quality products. While this trend allows local producers to target niche markets, it also presents challenges. The industry's ability to adapt to the growing demand for eco-friendly and ethically produced goods is vital for its future growth. However, doing so necessitates investments in skills, new technologies, and materials.

## 3.7 Regulatory pressures, circularity and environmental sustainability

As climate change continues to be a pressing issue, the Australian government has implemented stricter regulations focused on sustainability within various industries, including textiles, clothing, and footwear. These regulations aim to reduce carbon emissions, minimise water consumption, and decrease waste. While these policies aim to promote environmental sustainability, they may lead to increased operational costs for businesses, which must invest in greener technologies, sustainable materials, improved waste management practices and skills development.

The push for a circular economy - where textiles are reused, recycled, or upcycled - presents opportunities and challenges. Transitioning to this more sustainable model requires substantial investment in recycling technologies, eco-friendly manufacturing processes and skills. Additionally, Australian businesses will need to adapt to new regulations concerning product life cycles and waste reduction, which could further raise costs.

## 3.8 Trade agreements and economic protection

Australia has entered several free trade agreements, including the China- Australia Free Trade Agreement in 2015 -16, the Comprehensive and Progressive Agreement for Trans-Pacific Partnership in 2017-18, and the Australia- India Economic Cooperation Agreement signed in 2022. These agreements have eliminated tariffs on goods, facilitated increased imports from countries such as China, Vietnam and India, and intensified competitive pressures on local manufacturers. In the current international trade climate, it is difficult to predict tariff movements and impacts on free trade agreements.

While these agreements may present challenges for the Australian industry, they also create opportunities. For instance, the Regional Comprehensive Economic Partnership (RCEP), which was signed by 15 Asia-Pacific countries in 2020, including China, Japan, South Korea, and the ASEAN nations, has the potential to benefit Australian manufacturers. This agreement provides greater flexibility in the rules of origin, which could benefit Australian TCF manufacturers that source materials from other RCEP members.

Nevertheless, Australia's textile, clothing, and footwear industries face challenges when accessing markets with strict trade barriers or high tariffs. While trade agreements can help reduce these barriers, trade policies in other countries, such as recent moves to increase tariff protection in the U.S.A., can impact Australian businesses looking to export.

## 3.9 Technological change and digitisation

To stay competitive, the Australian textiles, clothing, and footwear industry must adopt new technologies and materials, including automation, 3D printing, and artificial intelligence, for production, design, and supply chain management. However, these advancements require significant investment, which may be challenging for many small and medium-sized enterprises to afford.

The rise of online retailing and e-commerce supply channels offers both opportunities and challenges for Australian TCF businesses. While the shift to e-commerce enables these

businesses to reach consumers and suppliers more efficiently, it also intensifies competition from international retailers and suppliers. These competitors may provide lower prices due to reduced production costs, greater economies of scale, and more efficient supply chain management.

As online B2B and B2C engagement increases, Australian TCF manufacturers must enhance their ability to operate effectively in digital marketplaces and engage with major global players like Amazon, Alibaba, and other sales channels.

## 3.10 Climate change and environmental factors

Australian agriculture is vulnerable to the effects of climate change, including droughts, floods, and other extreme weather events, which can disrupt the supply of raw materials like cotton and wool. This volatility in raw material supply can lead to price fluctuations and uncertainty in production planning.

The textile industry is a major consumer of water, particularly for dyeing and finishing fabrics. With Australia experiencing ongoing water scarcity in certain regions, TCF companies may face higher costs to manage their water use or comply with new water management regulations.

## 3.11 Consumer demand for ethical practices

Consumers, particularly young people, are pressing companies to adopt ethical production methods, such as using sustainable materials, ensuring fair labour practices, reusing and repurposing products, and promoting transparency in supply chains. Meeting these expectations requires significant investment in sustainable production methods and materials, which can increase costs.

Companies may need to obtain certifications like Fairtrade, Ethical Clothing Australia, OEKE-TEX, or the Global Organic Textile Standard to meet consumer demand for ethically sourced products. However, obtaining and maintaining these certifications often involves additional costs and regulatory compliance, which can be challenging for small to medium-sized businesses.

The Australian textile, clothing, and footwear industry faces significant macroeconomic challenges, including global competition, economic uncertainty, and regulatory pressures. To address these challenges, local businesses must adapt by embracing innovation, sustainability, workforce training, and efficient production methods. Although these pressures are significant, they allow companies to stand out by offering high-quality, sustainable products and catering to niche markets prioritising ethical and local production.

# 4. TCF industry – Skill formation

Workers in the textile, clothing and footwear industry acquire skills in a variety of ways. The ensuing section of this report sets out the approaches to skill formation in the industry, as well as the current extent and barriers to expanding the provision of nationally recognised training in the industry.

## 4.1 Learning at work

Most workers in Australia's textile, clothing, and footwear industry do not have formal qualifications. Over fifty percent of these employees have secondary education as their highest attainment level, including 45% who have completed Year 10 and 8% who have finished Year 9 or below.

Many individuals in the sector learn essential work skills through hands-on training and on-the-job experience. Some work under the guidance of experienced operators who teach them tasks such as operating machinery, handling materials, understanding different fabric types, and cutting techniques. Others develop their skills by operating sewing machines, dyeing fabrics, cutting, and finishing textiles. In some workplaces, employees rotate through different job roles to gain a comprehensive understanding of the production process. This practical approach helps workers acquire the technical skills needed for their roles.

Some companies encourage their employees to pursue formal certification in specific skill areas, such as quality control, workplace health and safety, forklift operation, chemical safety, textile chemistry, and machine operation. This is often done by completing short courses, which may or may not be formally accredited. The motivation behind this support is frequently linked to regulatory requirements or supply chain needs.

Companies often implement short internal training programs to enhance specific skills, for example, training on software updates or newly installed machinery. Some workplaces also provide access to e-learning platforms or online courses where employees can improve their technical knowledge and soft skills, such as management and teamwork. Employees frequently learn new skills by using supplier-sponsored training programs on the latest equipment and materials.

TCF professionals attend industry events to stay informed about new technologies, trends, and techniques. Workers such as designers, technicians, and production staff often collaborate and share knowledge, helping each other develop new skills, particularly about new machinery, processes, and materials. New employees typically shadow experienced colleagues to observe their techniques and workflows before performing tasks themselves.

Mastering specific skills, such as machine operation or fabric handling, requires extensive and repetitive practice until workers become proficient. Regular feedback from supervisors and colleagues is crucial for skill development, especially for precision tasks like fabric cutting or stitching. Workers learn to identify and resolve issues with materials or machinery, which enhances their problem-solving and technical skills.

Most textile, clothing, and footwear workers, particularly those in production roles, develop and refine their skills throughout their careers through these approaches to skill development. As a result, many experienced workers do not hold nationally recognised qualifications and

are not part of the national training system. However, this does not imply that they are unskilled. There is significant potential across all TCF industry sectors for workers to receive national recognition for their skills through the expansion of government-supported Recognition of Prior Learning programs and to expand their skills through targeted skills-upgrading programs.

## 4.2 Nationally recognised training

While many industry workers acquire skills through non-accredited workplace training and hands-on experience, 5,330 individuals were enrolled in nationally recognised qualifications in 2023 delivered through the *MST Textiles, Clothing, and Footwear Training Package* [MST30519]. This is an increase from the 4,555 enrolled in TCF Training Package qualifications in 2019.

As illustrated in Figures 4.1 and 4.2, the Training Package comprises 16 qualifications ranging from Certificate II to Advanced Diploma and 20 skill sets covering the fashion and apparel, textile manufacturing, footwear production, leather production, alteration and repair services and dry cleaning and laundry services sectors.

**Figure 4.1 Qualifications in *MST Textiles, Clothing and Footwear Training Package* [MST30519]**

| Code | Title |
|---|---|
| MST20319 | Certificate II in Leather Production |
| MST20422 | Certificate II in Laundry Operations |
| MST20722 | Certificate II in Apparel, Fashion and Textiles |
| MST30222 | Certificate III in Manufactured Textile Products |
| MST30316 | Certificate III in Millinery |
| MST30416 | Certificate III in Footwear |
| MST30519 | Certificate III in Leather Production |
| MST30622 | Certificate III in Laundry Operations |
| MST30922 | Certificate III in Dry Cleaning Operations |
| MST31022 | Certificate III in Apparel, Fashion and Textiles |
| MST40122 | Certificate IV in Textile Design and Technology |
| MST40222 | Certificate IV in Apparel and Fashion |
| MST40316 | Certificate IV in Custom-Made Footwear |
| MST40416 | Certificate IV in Millinery |
| MST50122 | Diploma of Apparel, Fashion and Textiles |
| MST60122 | Advanced Diploma of Apparel, Fashion and Textiles |

**Figure 4.2 Skills Sets in *MST Textiles, Clothing and Footwear Training Package* [MST30519]**

| Code | Title |
|---|---|
| MSTSS00003 | Introduction to Laundry Operations Skill Set |
| MSTSS00004 | Introduction to Laundry or Dry-Cleaning Industry Skill Set |
| MSTSS00005 | Control Hygiene in Laundry Operations Skill Set |
| MSTSS00008 | Use Technology in TCF Operations Skill Set |
| MSTSS00010 | Supervise Work TCF Operations Skill Set |
| MSTSS00011 | Ironer Safety Skill Set |
| MSTSS00014 | Manage Technology in TCF Operations Skill Set |
| MSTSS00015 | Industrial Sewing Skill Set |
| MSTSS00016 | Clothing Alterations and Repairs Skill Set |
| MSTSS00017 | Sample Machining Skill Set |
| MSTSS00018 | Advanced Garment Alterations and Repairs Skill Set |
| MSTSS00019 | Sewing and Finishing Skill Set |
| MSTSS00020 | Advanced Garment Production Skill Set |
| MSTSS00021 | Textiles, Clothing and Footwear Buying Skill Set |
| MSTSS00022 | Textiles, Clothing and Footwear Sourcing for Production Skill Set |
| MSTSS00023 | Sustainable Practices in Laundry Operations Skill Set |
| MSTSS00024 | Sustainable Practices in Dry Cleaning Operations Skill Set |
| MSTSS00025 | Spotting Skill Set |
| MSTSS00026 | Customer service in Laundry or Dry-Cleaning Operations Skill Set |
| MSTSS00027 | Dispose of Waste Products in TCF Operations |

The *MST Textiles, Clothing and Footwear Training Package* qualifications facilitate career pathways and progression between AQF levels. There are no entry requirements for MST qualifications. Skill sets also provide alternative pathways into qualifications.

The qualifications career pathways chart (Figure 4.3) shows the progression from Certificate II to Advanced Diploma qualifications, including potential apprenticeship pathways, in the MST Training Package.

This mix of qualifications and skill sets is offered by a diverse range of 34 Registered Training Organisations which comprise TAFE Institutes (38.2%), private providers (47.0%), schools (11.7%), and community providers (2.9%) – see Figure 4.4.

**Figure 4.4 RTOs with scope of registration to offer MST qualifications 2025**

| Type of RTO | Number of RTOs | % of total |
|---|---|---|
| TAFE Institute | 13 | 38.2 |
| Private provider | 16 | 47.0 |
| School | 4 | 11.7 |
| Community provider | 1 | 2.9 |
| Enterprise provider | 0 | 0 |
| University | 0 | 0 |
| Total | 34 | 99.8 |

*Source: training.gov.au March 2025*

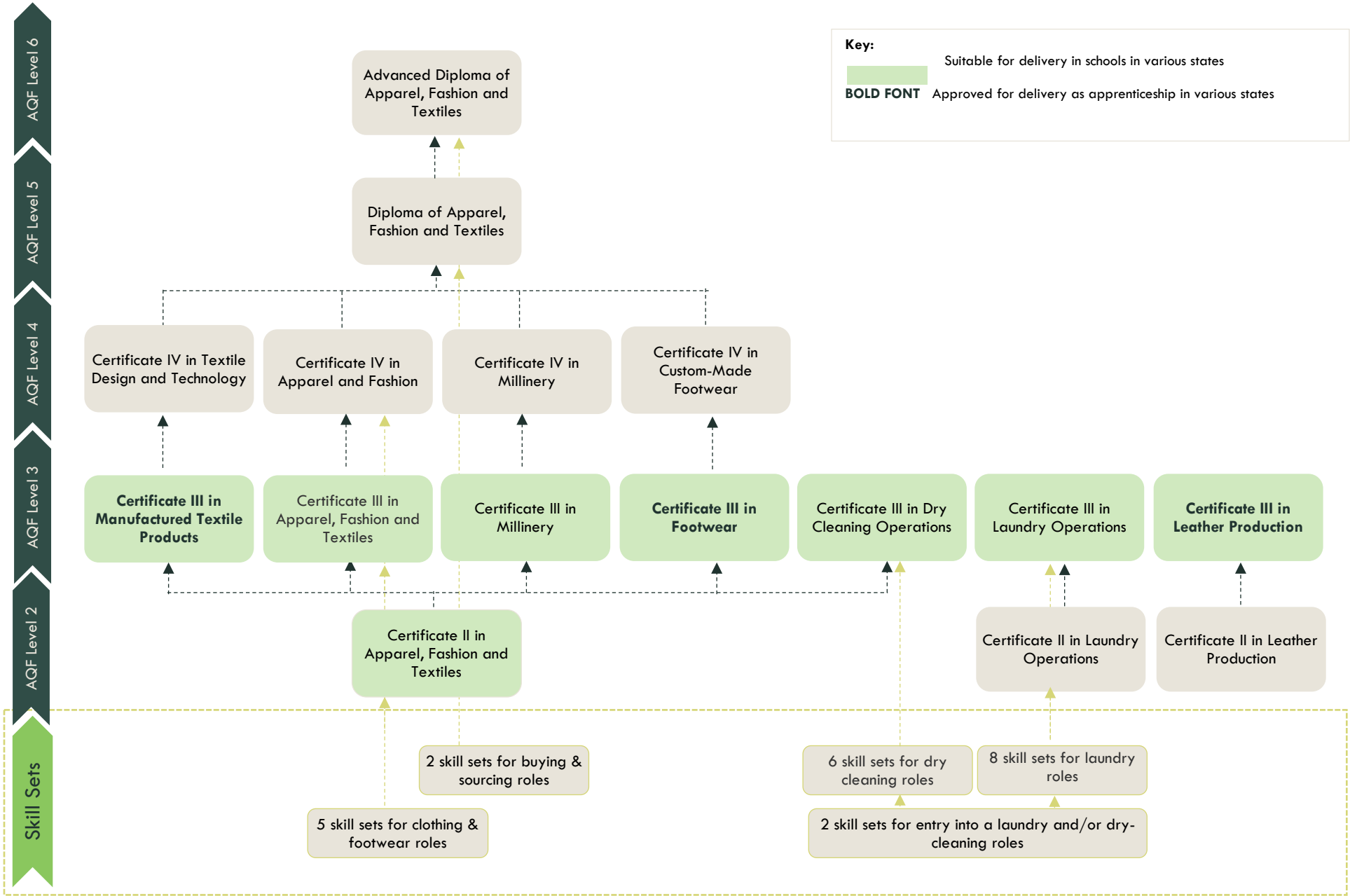
As shown in Figure 4.5, most Registered Training Organisations are in Queensland, New South Wales, Victoria and Western Australia. This uneven distribution means that individuals in some States and Territories, particularly South Australia, Tasmania, and the Northern Territory, may struggle to find an RTO that can provide the qualifications or skill sets they need.

**Figure 4.5 Head office location of RTOs with scope of registration to offer MST qualifications 2025**

| Type of RTO | Number of RTOs | % of total |
|---|---|---|
| New South Wales | 4 | 11.7 |
| Queensland | 11 | 32.3 |
| Victoria | 10 | 29.4 |
| South Australia | 1 | 2.9 |
| Tasmania | 1 | 2.9 |
| Northern Territory | 0 | 0 |
| Australian Capital Territory | 2 | 5.8 |
| Western Australia | 5 | 14.7 |
| Total | 34 | 99.7 |

*Source: training.gov.au March 2025*

**Figure 4.3 Pathways in *MST Textiles, Clothing and Footwear Training Package* [MST30519]**



While TAFE Institutes comprise 38.2% of all RTOs offering MST qualifications, they delivered training to 3,640 or 68.2% of all students enrolled in these qualifications in 2023 – see Figure 4.6.

**Figure 4.6 Enrolments in qualifications in *MST Textiles, Clothing and Footwear Training Package* [MST30519] by type of provider.**

| Provider type | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|
| TAFE institutes | 3,205 | 3,125 | 3,680 | 3,690 | 3,640 |
| Universities | 205 | 145 | 175 | 215 | 280 |
| Schools | 220 | 170 | 210 | 260 | 235 |
| Community education providers | 110 | 80 | 115 | 120 | 155 |
| Enterprise providers | 90 | 50 | 40 | 15 | 10 |
| Private training providers | 725 | 785 | 935 | 900 | 1,020 |
| Totals | 4,555 | 4,350 | 5,150 | 5,200 | 5,330 |

*Source: NCVER March 2025*

Even though many students enrol in MST qualifications, less than half complete the programs they start (Figure 4.7).

In considering enrolment and completion data, it is important to remember that students may take varying amounts of time to finish their qualifications, making year-to-year comparisons challenging.

Nevertheless, the overall trend suggests that many students who enrol in MST qualifications do not complete them. The reasons for the high level of non-completion are not immediately apparent. Consultations with companies, industry organisations and RTOs undertaken for this project suggest that factors such as the length and complexity of the qualifications, the adequacy of career advice, the accuracy of information provided to prospective students on the TCF industry, the lack of flexibility in program delivery methods, and the time required to complete the qualifications may be factors impacting on the non-completion rate.

**Figure 4.7 Completions of qualifications in *MST Textiles, Clothing and Footwear Training Package* [MST30519] by type of provider.**

| Provider type | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|
| TAFE institutes | 945 | 900 | 935 | 1,050 | 1,250 |
| Universities | 110 | 25 | 35 | 40 | 50 |
| Schools | 60 | 60 | 55 | 75 | 50 |
| Community education providers | 30 | 20 | 25 | 5 | 70 |
| Enterprise providers | - | - | - | 5 | - |
| Private training providers | 235 | 215 | 265 | 275 | 325 |
| Total | 1,380 | 1,225 | 1,305 | 1,450 | 1,740 |

*Source: NCVER March 2025*

Figure 4.8 shows enrolments in current and superseded MST qualifications. Most enrolments are in fashion and apparel qualifications. In 2023, 4,830 or 90.6% of all MST qualification enrolments were in fashion and apparel. It should be noted that this figure may be slightly overstated as there are some students who enrol in specialisations in entry level Certificate II qualifications in areas such as footwear production, however these are negligible and have little impact on the overall pattern.

**Figure 4.8 Enrolments in current and superseded qualifications in *MST Textiles, Clothing and Footwear Training Package* [MST30519] – current qualifications shown in bold.**

| Program name | Year | |
|---|---|---|
| | 2019 | 2023 |
| Totals | 4,555 | 5,330 |
| LMT11107 - Certificate I in Textiles Clothing and Footwear | 5 | - |
| LMT21706 - Certificate II in Applied Fashion Design and Technology | - | 5 |
| LMT30307 - Certificate III in Cotton Ginning | 10 | - |
| MST20116 - Certificate II in TCF Production Support | 95 | 25 |
| MST20216 - Certificate II in TCF Production Operations | 150 | 45 |
| MST20316 - Certificate II in Leather Production | 10 | - |
| **MST20319 - Certificate II in Leather Production** | **-** | **80** |
| MST20416 - Certificate II in Laundry Operations | 60 | - |
| MST20419 - Certificate II in Laundry Operations | - | 95 |
| **MST20422 - Certificate II in Laundry Operations** | **-** | **10** |
| MST20616 - Certificate II in Applied Fashion Design and Technology | 1,775 | 2,130 |
| **MST20722 - Certificate II in Apparel, Fashion and Textiles** | **-** | **30** |
| MST30116 - Certificate III in Clothing and Textile Production | 230 | - |
| MST30119 - Certificate III in Clothing and Textile Production | - | 240 |
| MST30216 - Certificate III in Manufactured Textile Products | 45 | - |
| MST30220 - Certificate III in Manufactured Textile Products | - | 45 |
| **MST30222 - Certificate III in Manufactured Textile Products** | **-** | **20** |
| **MST30316 - Certificate III in Millinery** | **10** | **60** |
| **MST30416 - Certificate III in Footwear** | **-** | **5** |
| MST30516 - Certificate III in Leather Production | 15 | - |
| **MST30519 - Certificate III in Leather Production** | **-** | **25** |
| MST30616 - Certificate III in Laundry Operations | 50 | - |
| MST30619 - Certificate III in Laundry Operations | - | 105 |
| **MST30622 - Certificate III in Laundry Operations** | **-** | **10** |
| MST30816 - Certificate III in Applied Fashion Design and Technology | 645 | 10 |
| MST30819 - Certificate III in Applied Fashion Design and Technology | - | 980 |
| MST30919 - Certificate III in Dry Cleaning Operations | - | 20 |
| **MST31022 - Certificate III in Apparel, Fashion and Textiles** | **-** | **115** |

| | | |
|---|---|---|
| MST40116 - Certificate IV in Textile Design, Development and Production | 80 | - |
| MST40119 - Certificate IV in Textile Design, Development and Production | - | 105 |
| MST40216 - Certificate IV in Clothing Production | 95 | - |
| MST40219 - Certificate IV in Clothing Production | - | 50 |
| **MST40316 - Certificate IV in Custom-Made Footwear** | **15** | **30** |
| **MST40416 - Certificate IV in Millinery** | **35** | **10** |
| MST40516 - Certificate IV in Applied Fashion Design and Merchandising | 165 | - |
| MST40519 - Certificate IV in Applied Fashion Design and Merchandising | - | 65 |
| MST50116 - Diploma of Applied Fashion Design and Merchandising | 855 | - |
| MST50119 - Diploma of Applied Fashion Design and Merchandising | - | 860 |
| MST60116 - Advanced Diploma of Applied Fashion Design and Merchandising | 185 | - |
| MST60119 - Advanced Diploma of Applied Fashion Design and Merchandising | - | 160 |
| MST60216 - Advanced Diploma of Textile Design and Development | 15 | - |

*Source: NCVER March 2025*

In 2023, 2,165 or 44.8% of all enrolments in fashion and apparel qualifications were in Certificate II level programs (see Figure 4.9). Among these, 1,865 enrolments, or 86.1%, were individuals aged 15 to 19 years. Additionally, 1,015 of these individuals, or 54.4%, were enrolled in TAFE institutes, while 235, or 12.6%, were enrolled in schools. The total number of enrolments in Certificate II qualifications was consistent from 2019 to 2023, indicating that over 1,100 individuals aged 15 to 19 enrolled in Certificate II qualifications each year. This contradicts the views of some industry observers who argue that attracting young people to the TCF industry is difficult.

**Figure 4.9 Enrolments in fashion and apparel qualifications by AQF level 2023**

| AQF Level | Enrolments in fashion and apparel qualifications – all ages | |
|---|---|---|
| | Number | % |
| Certificate II | 2,165 | 44.8 |
| Certificate III | 1,405 | 29.0 |
| Certificate IV | 240 | 4.9 |
| Diploma | 860 | 17.8 |
| Advanced Diploma | 160 | 3.3 |
| Total | 4,830 | 99.8 |

*Source: NCVER March 2025*

While there has been some success in attracting young people to enrol in entry-level Certificate II fashion and apparel qualifications, achieving completion of the programs has been less successful. As shown in Figure 4.10, only 556 students per year on average completed MST20616 - Certificate II in Applied Fashion Design and Technology in 2019-2023, the qualification with the highest number of enrolments. This qualification had 1,959 enrolments each year on average in 2019-2023. The low completion rate might partly explain the difficulties that companies have in attracting young employees. As discussed previously, the reasons for non-completion are complex.

Further work should be done on why so many young people do not complete these entry-level qualifications and whether this influences their decision to seek employment in the industry.

**Figure 4.10 Completions in current and superseded qualifications in *MST Textiles, Clothing and Footwear Training Package* [MST30519] – current qualifications are shown in bold.**

| Program name | Year | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| Totals | | 1,380 | 1,225 | 1,305 | 1,450 | 1,740 |
| LMT11107 - Certificate I in Textiles Clothing and Footwear | | - | - | 10 | - | - |
| LMT21706 - Certificate II in Applied Fashion Design and Technology | | - | - | - | - | *5* |
| LMT30307 - Certificate III in Cotton Ginning | | - | *5* | - | - | - |
| MST20116 - Certificate II in TCF Production Support | | 10 | - | - | - | - |
| MST20216 - Certificate II in TCF Production Operations | | - | - | - | 10 | 15 |
| MST20316 - Certificate II in Leather Production | | 10 | 35 | - | - | - |
| **MST20319 - Certificate II in Leather Production** | | **-** | **-** | **55** | **75** | **50** |
| MST20416 - Certificate II in Laundry Operations | | 10 | *5* | - | - | - |
| MST20419 - Certificate II in Laundry Operations | | - | *5* | 10 | 10 | *5* |
| MST20616 - Certificate II in Applied Fashion Design and Technology | | *565* | 500 | *515* | *575* | 625 |
| **MST20722 - Certificate II in Apparel, Fashion and Textiles** | | **-** | **-** | **-** | **-** | **10** |
| MST30116 - Certificate III in Clothing and Textile Production | | 105 | 25 | *5* | - | - |
| MST30119 - Certificate III in Clothing and Textile Production | | - | - | 20 | 35 | 95 |
| MST30216 - Certificate III in Manufactured Textile Products | | 10 | *5* | 10 | - | - |
| MST30220 - Certificate III in Manufactured Textile Products | | - | - | *5* | *5* | 25 |
| **MST30316 - Certificate III in Millinery** | | **5** | **-** | **5** | **20** | **20** |
| MST30516 - Certificate III in Leather Production | | *5* | 10 | - | - | - |
| **MST30519 - Certificate III in Leather Production** | | **-** | **-** | **5** | **5** | **-** |
| MST30616 - Certificate III in Laundry Operations | | 15 | 30 | 35 | - | - |
| MST30619 - Certificate III in Laundry Operations | | - | - | 10 | 35 | 35 |
| **MST30622 - Certificate III in Laundry Operations** | | **-** | **-** | **-** | **-** | **10** |
| MST30816 - Certificate III in Applied Fashion Design and Technology | | 255 | 250 | - | - | - |
| MST30819 - Certificate III in Applied Fashion Design and Technology | | - | 20 | 295 | 300 | 390 |
| MST30919 - Certificate III in Dry Cleaning Operations | | - | - | - | - | 10 |
| MST31022 - Certificate III in Apparel, Fashion and Textiles | | - | - | - | - | 35 |

| | | | | | |
|---|---|---|---|---|---|
| MST40116 - Certificate IV in Textile Design, Development and Production | 35 | - | - | - | - |
| MST40119 - Certificate IV in Textile Design, Development and Production | - | 20 | 20 | 15 | 20 |
| MST40216 - Certificate IV in Clothing Production | 15 | 10 | - | - | - |
| MST40219 - Certificate IV in Clothing Production | - | 5 | 15 | 10 | 30 |
| **MST40316 - Certificate IV in Custom-Made Footwear** | **15** | **-** | **10** | **5** | **10** |
| **MST40416 - Certificate IV in Millinery** | **5** | **-** | **5** | **10** | **5** |
| MST40516 - Certificate IV in Applied Fashion Design and Merchandising | 30 | 20 | - | - | - |
| MST40519 - Certificate IV in Applied Fashion Design and Merchandising | - | 45 | 25 | 25 | 25 |
| MST50116 - Diploma of Applied Fashion Design and Merchandising | 190 | 125 | 5 | 10 | - |
| MST50119 - Diploma of Applied Fashion Design and Merchandising | - | 45 | 160 | 245 | 255 |
| MST60116 - Advanced Diploma of Applied Fashion Design and Merchandising | 80 | 35 | 5 | - | - |
| MST60119 - Advanced Diploma of Applied Fashion Design and Merchandising | - | 20 | 60 | 60 | 60 |
| MST60216 - Advanced Diploma of Textile Design and Development | 15 | - | - | - | - |
| MST60219 - Advanced Diploma of Textile Design and Development | - | 5 | 5 | - | - |

## 4.3 Barriers to expanding the provision of TCF training package qualifications and skill sets

Australia's textile, clothing, and footwear industry faces significant obstacles in expanding the provision of nationally recognised training. The following section of this report outlines the primary challenges.

### 4.3.1 Small current industry size impact on nationally recognised training

The small size of the TCF industry, along with the wide range of sectors and occupations, limits the demand for training and affects the sustainability of training provision. Many training providers struggle because the market for TCF qualifications and skill sets is limited. This is because the actual and potential number of learners is too small to make training financially viable for providers. Contributing factors to this issue include low and fluctuating student numbers, high costs associated with long travel distances for delivering training to regional and remote areas, and insufficient funding. To address these challenges, attention should be given to expanding the provision of group training, creating training hubs involving RTOs, companies and communities in a region that can share resources, provide information on training options and organise the delivery of training programs, and developing training programs that focus on core technical skills relevant across multiple industry sectors.

#### 4.3.2 Lack of qualified TCF trainers and assessors with up-to-date industry skills

The availability of trainers and assessors with training and assessment qualifications, up-to-date industry experience, and expertise in applying new technologies, production processes, and materials is a significant constraint on expanding nationally recognised training. Trainers will increasingly need to be equipped to deliver digital skills, such as computer-aided design (CAD), digital measuring, and 3D design. A greater focus on using these skills in the TCF industry will also help capture the imagination and interest of potential industry entrants.

#### 4.3.3 Subject matter experts unable to invest in skills

Many businesses in the TCF sector are small to medium-sized enterprises. These businesses often face financial pressures, limiting their ability to invest in workforce training. These businesses may prioritise short-term operational needs over long-term employee development.

#### 4.3.4 Need for specialised training equipment and facilities

The TCF industry increasingly incorporates advanced technologies like automation, digital design, and sustainable manufacturing practices. Specialised training is often required in these areas, but suitable facilities, equipment, and qualified trainers are limited.

#### 4.3.5 Cost of training infrastructure

Many TCF training programs require specialised equipment and facilities (e.g., industrial sewing machines, design software, and textile production machinery), which can be expensive. Small training providers often struggle to afford the necessary infrastructure, limiting the availability of practical, hands-on training. New collaborative approaches to training delivery, such as group training, are needed to ensure that learners can gain experience in working with the latest technologies and materials.

#### 4.3.6 Lack of training providers in regional, rural and remote areas

TCF training providers and facilities are concentrated in major cities, especially in the eastern states, leaving people in regional, rural or remote areas with limited access to training programs. Travel costs and lack of local training providers offering specialised training make it harder for workers outside urban centres to pursue TCF qualifications.

#### 4.3.7 Limited availability of online, flexible learning resources

Many small operators need access to flexible online learning resources that can be used in the workplace. The Dry-Cleaning Institute of Australia is developing a limited range of online training resources for individuals seeking dry cleaning skills. The absence of online training resources that are linked to units of competency and skill sets, accessible in the workplace, considerate of potential users' language and literacy skills, and presented in an engaging and informative format is a significant barrier to the growth of nationally recognised training in the TCF industry.

#### 4.3.8 Language and literacy support required for migrant workers

Workers from non-English-speaking backgrounds may have difficulty accessing training due to language and literacy issues. This barrier can limit their ability to fully engage with training programs and contribute to the sector's workforce.

#### 4.3.9 Learning support for First Nations and CALD workers

Training must also be accessible to Indigenous and culturally and linguistically diverse populations. Programs that don't cater to these groups' specific needs may see lower participation and completion rates.

#### 4.3.10 Limited capacity to provide training on sustainability and circularity principles

With an increasing focus on sustainability and ethical production, there is a growing demand for sustainable production methods, circular fashion, and waste reduction skills. Training programs need to be adapted to meet these new industry standards. However, there is often a lack of expertise in these areas, and the sector may not yet be fully equipped to deliver this type of specialised training.

#### 4.3.11 Limited capacity to recognise the skills and address the upskilling needs of existing workers

Much of the current training efforts in the TCF industry focus on meeting the skill needs of new entrants. However, many skilled existing workers lack formal qualifications and require access to high-quality, cost-effective, and time-efficient recognition of prior learning services. Additionally, others need access to nationally recognised upskilling programs to help them adapt to new technologies and materials. There is a critical lack of government support for these programs and a critical lack of training providers who can offer these services to companies.

# 5. TCF industry sector analysis

The textile, clothing, and footwear industry comprises six distinct but interconnected sectors. These are:

- Textiles Manufacturing
- Fashion and Apparel Manufacturing
- Leather Manufacturing
- Footwear Production
- Dry-Cleaning and Laundry Services
- Clothing and Footwear Repairs and Alterations.

The ensuing section of this report provides an overview of each sector. This includes consideration of the economic landscape, workforce demographics, application of new technologies and materials, occupational structure and skill needs and the uptake of MST qualifications and skill sets in each sector.

## 5.1 Textiles Manufacturing

### 5.1.1 Sector profile

Textiles manufacturing includes a wide range of activities, from producing raw materials to creating finished fabrics. It involves processing both natural and synthetic fibres into various textile products. Key activities in this sector include spinning, weaving, knitting, dyeing, and finishing textiles. These processes transform raw fibres into fabrics used in fashion, home goods, and technical applications. The main subsectors of textile manufacturing include:

- Cut and Sewn Textile Product Manufacturing
- Textile Finishing and Other Textile Product Manufacturing
- Textile Floor Covering Manufacturing
- Rope, Cordage, and Twine Manufacturing
- Natural Textile Manufacturing
- Synthetic (specialised) Textile Manufacturing
- Cotton Ginning
- Wool Scouring.

The key activities conducted in this sector are listed in Figure 5.1.1

**Figure 5.1.1 Textile Manufacturing activities covered by ANZSIC Classification**

| ANZIC industry class | Main activities | |
|---|---|---|
| 0521 Cotton Ginning | • Cotton Ginning | |
| 1311 Wool Scouring | • Lanolin manufacturing<br>• Noil, wool, manufacturing<br>• Scoured wool manufacturing<br>• Slag wool manufacturing | • Tops, unspun wool, manufacturing<br>• Wool grease manufacturing<br>• Wool wax manufacturing<br>• Wool, carded or combed, manufacturing |
| 1312 Natural Textile Manufacturing | • Cotton sewing thread manufacturing<br>• Tow manufacturing (from flax, hemp or jute)<br>• Tyre cord yarn or fabric, cotton, manufacturing<br>• Woven fabric, cotton, manufacturing | • Woven fabric, woollen or worsted wool, manufacturing<br>• Yarn, cotton, flax or silk, manufacturing<br>• Yarn, woollen, manufacturing |
| 1313 Synthetic Textile Manufacturing | • Fabric, woven, manufacturing (elastic or elastomeric)<br>• Fabric, woven, manufacturing (predominantly of synthetic fibre)<br>• Fibreglass fabric manufacturing<br>• Lacing, woven, manufacturing | • Tyre cord yarn or fabric, synthetic fibre, manufacturing<br>• Yarn, elastic or elastomeric, manufacturing<br>• Yarn, synthetic fibre, manufacturing |
| 1333 Cut and Sewn Textile Product Manufacturing | • Animal blanket/cover manufacturing<br>• Awning, textile, manufacturing<br>• Bag or sack, textile or canvas, manufacturing (for packaging)<br>• Bed linen manufacturing<br>• Blind, textile, manufacturing (including plastic coated)<br>• Canvas goods manufacturing n.e.c.<br>• Cotton textile furnishing manufacturing<br>• Curtain manufacturing<br>• Cushion manufacturing (except rubber) | • Motor vehicle cover manufacturing<br>• Parachute manufacturing<br>• Pillow manufacturing (except rubber)<br>• Sail manufacturing<br>• Seat cover, textile, manufacturing (except sheepskin)<br>• Sleeping bag manufacturing<br>• Soft furnishing manufacturing<br>• Synthetic fibre textile furnishing manufacturing<br>• Tent manufacturing (except oxygen tents or toy tents)<br>• Textile furnishing manufacturing n.e.c. |

| | | |
|---|---|---|
| | • Flag or banner, manufacturing<br>• Hose, canvas, manufacturing<br>• Life jacket manufacturing | • Woollen textile furnishing manufacturing |
| 1334 Textile Finishing and Other Textile Product Manufacturing | • Badge, woven, manufacturing<br>• Binding, textile, manufacturing<br>• Embroidered apparel manufacturing<br>• Embroidered fabric manufacturing<br>• Felt manufacturing<br>• Label, printed cloth, manufacturing | • Label, woven cloth, manufacturing<br>• Textile dyeing<br>• Textile fabric coating<br>• Textile printing (except screen printing)<br>• Textile product manufacturing n.e.c.<br>• Underfelt manufacturing |
| 1331 Textile Floor Covering Manufacturing | • Carpet manufacturing<br>• Carpet tile manufacturing<br>• Floor rug, textile, manufacturing | • Hard fibre floor covering manufacturing (including sisal, coir and grass mat manufacturing)<br>• Jute matting manufacturing |
| 1332 Rope, Cordage and Twine Manufacturing | • Cable manufacturing (from natural or synthetic fibres)<br>• Cord manufacturing (except wire rope or tyre cord)<br>• Cordage manufacturing<br>• Fish net manufacturing<br>• Net manufacturing n.e.c. | • Netting, textile, manufacturing<br>• Rope manufacturing (except wire rope)<br>• String manufacturing<br>• Twine manufacturing |

*Source: Australian Bureau of Statistics, Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006 (Revision 2.0)*

In May 2022-23, 13,947 people were employed across the sector, working in 2,587 businesses. As shown in Figure 5.1.2, the largest subsectors of the industry, in terms of employment, are Cut and Sewn Textile Product Manufacturing [7,922] and Textile Finishing and Other Textile Product Manufacturing [2,709] and Textile Floor Covering Manufacturing [1,622].

**Figure 5.1.2 Textile Manufacturing – number of companies**

| Textile manufacturing sub sector | Number of employees 2022-23 | Number of enterprises 2023 | % of enterprises in textile manufacturing sub sector |
|---|---|---|---|
| 1333 Cut and Sewn Textile Product Manufacturing | 7,992 | 1,540 | 59.5 |
| 1334 Textile Finishing and Other Textile Product Manufacturing | 2,709 | 729 | 28.1 |
| 1331 Textile Floor Covering Manufacturing | 1,622 | 88 | 3.4 |

| | | | |
|---|---|---|---|
| 1332 Rope, Cordage and Twine Manufacturing | 444 | 71 | 2.7 |
| 1312 Natural Textile Manufacturing | 369 | 64 | 2.4 |
| 1313 Synthetic Textile Manufacturing | 558 | 53 | 2.0 |
| 0521 Cotton Ginning | na | 29 | 1.1 |
| 1311 Wool Scouring | 253 | 13 | 0.5 |
| | 13,947 | 2,587 | 99.7 |

*Source: ABS, 2023, 8165.0 Counts of Australian Businesses, Entries and Exits, June 2019 to June 2023*

The ensuing section of the report provides a description of two of the largest subsectors in the textile manufacturing industry, namely Cut and Sewn Textile Product Manufacturing and Textile Floor Covering Manufacturing.

### 5.1.2 Cut and Sewn Textile Product Manufacturing

Manufacturers in this industry primarily produce household textile goods, excluding apparel. This includes bed linen, curtains, towels, and pillows. They also create products like blinds, tents, awnings, sails, tarpaulins, and other items made from natural or synthetic fibres. These products can be made from purchased cut and sewn materials or from fabrics, fibres, and materials woven and manufactured in the same facility.

Australia's cut and sewn textile product sector comprises 1,540[2] enterprises, primarily concentrated in Victoria, Queensland and New South Wales – see Figure 5.1.3.

**Figure 5.1.3 Location of Cut and Sewn Textile Product Manufacturing enterprises**

| State/Territory | Establishments [% of total] |
|---|---|
| NSW | 29.2 |
| QLD | 21.8 |
| VIC | 26.9 |
| SA | 7.3 |
| WA | 11.2 |
| TAS | 2.1 |
| ACT | 0.9 |
| NT | 0.6 |

*Source: IBISWorld 2025*

[2] Source: IBISWorld data on total number of establishments in 2024-25

**Figure 5.1.4 Number of Cut and Sewn Textile Product Manufacturing businesses, 2023**

| ANZSIC Sub-sector | Non employing | 1-4 Employees | 5-19 Employees | 20-199 Employees | 200+ Employees | Total |
|---|---|---|---|---|---|---|
| Cut and Sewn Textile Product Manufacturing Enterprises | 744 | 434 | 289 | 71 | 3 | 1,540 |
| % of all Cut and Sewn Textile Product Manufacturing Enterprises | 48.3% | 28.1% | 18.7% | 4.6% | 0.1% | 100% |

*Source: ABS, 2023, 8165.0 Counts of Australian Businesses, Entries and Exits, June 2019 to June 2023*

The largest manufacturer, Hunter Douglas accounted for 8.5% of total industry revenue in 2025. As indicated in Figure 5.1.4, nearly half the businesses are non-employing. Over 50% of the industry's employing enterprises have fewer than 4 employees, reflecting the widespread presence of small-scale operations.

Over the last fifteen years, there has been a significant reduction in the number of businesses in the sector. In 2007-8, 1,844 enterprises operated at 2,087 locations in Australia. By 2024-5, this has declined to 1,452 enterprises operating at 1,637 locations.

There has been a corresponding drop in employment in the sector, declining from 11,224 people in 2007-8 to 7,798 in 2024-5. It is estimated that employment declined by 0.2% in 2019 - 24 and it is predicted that employment will decrease by a further 3.7% over the next five years.

As shown in Figure 5.1.5, the main products produced in the sector are:

- textile blinds and awnings
- indoor textile furnishing articles
- textile tarpaulins, sails and tents
- towels, cloths and other textile products.

**Figure 5.1.5 Cut and Sewn Textile Product Manufacturing businesses in Australia**

| Products | Total sales [$ million AUD] | Percentage of total sales of cut and sewn textile products |
|---|---|---|
| Textile blinds and awnings | 1000.0 | 43.9 |
| Indoor textile furnishing articles | 724.3 | 31.1 |
| Textile tarpaulins, sails and tents | 358.7 | 15.4 |
| Towels, cloths and other textile products | 223.6 | 9.6 |

*Source: IbisWorld 2025*

In 2024, the industry generated $2,329.0 million in revenue, but this has been declining. Over 2019 to 2024, sales revenue declined by 0.4% and is predicted to decrease by a further 0.4% in the coming five years, reaching $2,253.3 million in 2030.

The industry's downward trend is driven mainly by low-cost overseas manufacturers capturing market share. Currently, imports account for about 66.0% of domestic demand. The fragmented nature of the industry, characterised by many small-scale manufacturers, makes it vulnerable to import competition. This is because importers can take advantage of their larger economies of scale to outperform domestic manufacturers.

The latest IBISWorld report notes that '… low-cost import competition has constrained the revenue of the Cut and Sewn Textile Product Manufacturing industry. This trend has forced firms to focus on automation and niche products to remain competitive. Industry profitability is slated to grow as manufacturers focus on higher-quality products.'

Australian manufacturers have invested in automation and focused on premium products to remain competitive. For example, strong demand for premium blinds, shutters and awnings has supported industry sales revenue. However, international competitors, which have invested in new technologies and have greater economies of scale, have adjusted their product lines to include higher quality products that are price-competitive with Australian manufactured products.

Australia is a net importer of cut and sewn textile products, with total imports of $4.2 billion and total exports of $149.9 million.

Figure 5.1.6 indicates that China is the largest source of imported cut and sewn textile products. Other significant sources of imports are India, Singapore and Pakistan.

**Figure 5.1.6 Australia - major sources of imports of cut and sewn textile products**

| Export market | Value [$ billion] | % of total cut and sewn textile products exports |
|---|---|---|
| China | 2.6 | 62.4 |
| India | 0.4 | 8.7 |
| Singapore | 0.2 | 4.6 |
| Pakistan | 0.2 | 4.6 |

*Source: IbisWorld 2025*

Australia has a small but vulnerable export market for cut and sewn textile products. As illustrated in Figure 5.1.7, New Zealand, the USA, China, and Papua New Guinea (PNG) are Australia's primary export destinations. Although exports have grown and now represent 6.4% of the industry's revenue, the countries to which Australia exports either have well-developed domestic manufacturers, like the USA and China, or may be drawn to the high-quality, lower-priced products offered by Australia's competitors.

**Figure 5.1.7 Australia - major export markets for cut and sewn textile products**

| Export market | Value [$ million] | % of total cut and sewn textile products exports |
|---|---|---|
| New Zealand | 72.3 | 48.2 |
| USA | 15.6 | 10.4 |
| China | 9.7 | 6.5 |
| PNG | 6.9 | 4.6 |

*Source: IbisWorld 2025*

### 5.1.3 Textile Floor Covering Manufacturing

Companies in this sector manufacture carpets, rugs and other textile floor coverings.

Australia's textile floor covering sector comprises 79[3] enterprises, primarily concentrated in Victoria and New South Wales – see Figure 5.1.8.

**Figure 5.1.8 Location of Textile Floor Covering Manufacturing enterprises**

| State/Territory | Establishments [% of total] |
|---|---|
| NSW | 35.8 |
| QLD | 11.1 |
| VIC | 42.0 |
| SA | 3.7 |
| WA | 7.4 |
| TAS | 0.0 |
| ACT | 0.0 |
| NT | 0.0 |

*Source: IBISWorld 2025*

As indicated in Figure 5.1.9, about one-third of the businesses are non-employing. Over 50% of the industry's employing enterprises have fewer than 4 employees.

[3] Source: IBISWorld data on total number of establishments in 2024-25

**Figure 5.1.9 Number of Textile Floor Covering Manufacturing businesses, 2023**

| ANZSIC Sub-sector | Non employing | 1-4 Employees | 5-19 Employees | 20-199 Employees | 200+ Employees | Total |
|---|---|---|---|---|---|---|
| Textile Floor Covering Manufacturing | 33 | 26 | 15 | 13 | 0 | 88 |
| % of all Cut and Sewn Textile Product Manufacturing Enterprises | 37.5% | 29.5% | 17.0% | 14.7% | 0.0% | 100% |

*Source: ABS, 2023, 8165.0 Counts of Australian Businesses, Entries and Exits, June 2019 to June 2023*

As indicated in Figure 5.1.10, a small group of larger companies are responsible for over 60% of sales revenue in the industry. The largest manufacturer is Premium Floor Australia, which has a 34.1% market share and owns the following brands:

- Clix Laminate
- Nature's Oak
- Feltex Carpets
- Hycraft
- Godfrey Hirst Carpets
- Arc Bamboo
- Titan Hybrid & Vinyl
- ReadyCork
- Fibremakers Australia Pty Ltd
- Godfrey Hirst Australia Pty Ltd.

The next five largest companies, Victoria Carpets, Quest Carpets, Beaulieu of Australia, Tuftmaster Carpets and Interface Aust Pty Ltd, account for 30% of the market.

**Figure 5.1.10 Market share of largest Textile Floor Covering Manufacturing businesses, 2024**

| Company | Market Share (%) 2024 | Revenue ($m) 2024 |
|---|---|---|
| Premium Floors Australia | 34.1 | 306.6 |
| Victoria Carpets | 9.5 | 85.4 |
| Quest Carpets | 7.0 | 62.9 |
| Beaulieu of Australia | 6.3 | 56.2 |

| | | |
|---|---|---|
| Tuftmaster Carpets | 4.3 | 39.1 |
| Interface Aust Pty Ltd | 3.5 | 31.2 |

*Source IBISWorld 2024*

Over the last fifteen years, there has been a significant reduction in the number of businesses in the sector. In 2007-8, 147 enterprises operated at 168 locations in Australia. By 2024-5, this has declined to 79 enterprises operating at 83 locations.

There has been a corresponding drop in employment in the sector, declining from 2,187 people in 2007-8 to 1,416 in 2024-5. It is estimated that employment declined by 3.4% in 2019 – 24, and it is predicted that employment will be relatively stable, increasing by only 0.4%, over the next five years.

As shown in Figure 5.1.11, the main products produced in the sector are:

- tufted carpets
- woven carpets
- knotted carpets
- felt and other carpets.

**Figure 5.1.11 Textile Floor Covering Manufacturing businesses in Australia**

| Products | Total sales [$ million AUD] | Percentage of total sales of textile floor coverings |
|---|---|---|
| Tufted carpets | 655.4 | 72.9 |
| Woven carpets | 64.7 | 7.2 |
| Knotted carpets | 34.2 | 3.8 |
| Felt and other carpets | 144.7 | 16.1 |

*Source: IbisWorld 2025*

In 2024, the industry generated $899.0 million in revenue. Over the period 2019 to 2024 sales revenue declined by 1.8%. It is predicted to increase by 1.5% in the coming five years, reaching $970.2 million in 2030.

The latest IBISWorld report notes that '… the carpet manufacturing industry has faced significant challenges in recent years. The downstream residential construction market has performed poorly, with falling dwelling commencements having a significant impact on revenue. In addition, low-cost imports have penetrated the market, taking revenue away from domestic manufacturers. Lastly, there has been greater demand for substitutes such as wooden floorboards and ceramic tiling, diverting demand away from the industry. Despite these challenges, domestic manufacturers have attempted to differentiate themselves by creating premium and high-end products.'

While concentrating on premium products has proven to be a successful strategy, the Australian carpet industry faces significant competition in this market segment. High-quality imported carpets, especially from New Zealand, challenge local manufacturers. New Zealand carpet producers have advanced manufacturing processes that position them as leaders in high-end carpet manufacturing. Domestic manufacturers compete with both low-cost and high-end imports. As a result, local manufacturers now only supply 40% of the domestic market.

Australia is a net importer of textile floor coverings, with total imports of $617.1 million and total exports of $47.7 million.

Figure 5.1.12 shows that China is the largest source of imported textile floor coverings, followed by significant contributors like India, New Zealand, and Turkey.

**Figure 5.1.12 Australia - major sources of imports of textile floor coverings**

| Export market | Value [$ million] | % of total textile floor coverings exports |
|---|---|---|
| China | 182.8 | 29.6 |
| India | 128.3 | 20.8 |
| New Zealand | 84.2 | 13.6 |
| Turkey | 33.1 | 5.4 |

*Source: IbisWorld 2025*

Australia has a small but vulnerable export market for textile floor coverings, with New Zealand accounting for over 80% of export sales – see Figure 5.1.13.

**Figure 5.1.13 Australia - major export markets for textile floor coverings**

| Export market | Value [$ million] | % of total textile floor coverings exports |
|---|---|---|
| New Zealand | 39.9 | 83.6 |
| USA | 1.0 | 2.1 |
| Singapore | 0.9 | 1.9 |
| South Korea | 0.9 | 1.6 |

*Source: IbisWorld 2025*

### 5.1.4 Demographics

In 2021-22, there were 8,604 people employed in the cut and sewn textile products sector and 1,584 employed in the textiles flooring covering sector. Taken together, total employment in the two sectors was 10,188.

As shown in Figures 5.1.14 and 5.1.15, women comprised over 50% of the workforce in the two sectors, with Textile Floor Coverings Manufacturing having a higher proportion of female employees. Indigenous people formed 1% of the workforce in both sectors.

**Figure 5.1.14 Textile manufacturing industry - gender of workforce in selected sectors 2021**

| | % of total workforce | |
|---|---|---|
| | Cut and Sewn Textile Products | Textile Floor Coverings |
| Male | 46 | 38 |
| Female | 54 | 62 |

*Source: Census of Population and Housing, 2021*

**Figure 5.1.15 Textile manufacturing industry - employment of First Nations people in selected sectors 2021**

| | % of total workforce | |
|---|---|---|
| | Cut and Sewn Textile Products | Textile Floor Coverings |
| Indigenous | 1 | 1 |
| Non-Indigenous | 99 | 99 |

*Source: Census of Population and Housing, 2021*

While most people working in the industry in 2021, as shown in Figure 5.1.16, were born in Australia there was a significant number of workers who were born in Asia particularly South-East Asia

**Figure 5.1.16 Textile manufacturing industry - employment of culturally and linguistically diverse people in selected sectors 2021**

| Region of birth | % of workforce | |
|---|---|---|
| | Cut and Sewn Textile Products | Textile Floor Coverings |
| Australia | 58 | 69 |
| South-East Asia | 17 | 11 |
| North-East Asia | 7 | 1 |
| Southern and Central Asia | 4 | 4 |
| North-West Europe | 6 | 7 |
| Southern and Eastern Europe | 4 | 4 |
| Sub Saharan Africa | 1 | 2 |
| North Africa and the Middle East | 1 | 1 |
| Americas | 1 | 2 |

*Source: Census of Population and Housing, 2021*

There is a notable concentration of older workers in both sectors. As shown in Figure 5.1.17, the most significant portion of the workforce fell within the 50-59 age group, comprising around 30% in both sectors. Overall, 70% of workers in both sectors were aged over 40. This suggests that

many experienced workers will retire shortly. As a result, there is an urgent need for focused recruitment, training, and retention initiatives directed at younger people to ensure the industry's long-term operational stability.

The textile manufacturing industry has a relatively low representation of younger workers. The 20-29 age group accounts for about 10% of the workforce in both sectors, and the 15-19 age group comprises around 1-2%. The low number of younger workers is attributable to the industry's limited appeal to young workers, inadequate efforts to recruit and retain young people, the availability of relevant training and education programs, and the perceived lack of career prospects within the sectors. If this trend persists, the industry is likely to face ongoing skill shortages, which are exacerbated by the retirement of older workers.

**Figure 5.1.17 Textile manufacturing industry - age distribution of workforce in selected sectors 2021**

| | % of workforce | |
|---|---|---|
| Age Structure | Cut and Sewn Textile Products | Textile Floor Coverings |
| 15-19 years | 2 | 1 |
| 20-29 years | 10 | 13 |
| 30-39 years | 15 | 14 |
| 40-49 years | 21 | 22 |
| 50-59 years | 29 | 30 |
| 60-69 years | 19 | 17 |
| 70-79 years | 4 | 2 |

*Source: Census of Population and Housing, 2021*

As shown in Figure 5.1.18, just over half of the people working in these two sectors of the textile manufacturing industry have a secondary education as their highest level of education. This includes 8% who have completed Year 9 and below and about 47% who have completed Year 10 and above in both sectors. About 20% of workers hold a Certificate III or IV. In both sectors Diploma and Advanced Diploma holders constitute 10% of the workforce. Workers with higher education qualifications, including bachelor's degrees, graduate diplomas, and graduate certificates, make up 17% of the workforce in both sectors.

**Figure 5.1.18 Textile manufacturing industry – education level of workforce in selected sectors 2021**

| Level of education | % of workforce | |
|---|---|---|
| | Cut and Sewn Textile Products | Textile Floor Coverings |
| Secondary education – Year 9 and below | 8 | 8 |
| Secondary education – Year 10 and above | 46 | 47 |

| | | |
|---|---|---|
| Certificate III and IV | 20 | 17 |
| Advanced Diploma and Diploma | 10 | 10 |
| Bachelor's degree | 12 | 14 |
| Graduate Diploma and Graduate Certificate | 1 | 1 |
| Postgraduate degree | 3 | 3 |

*Source: Census of Population and Housing, 2021*

### 5.1.5 New technologies and materials

Companies in the Cut and Sewn Textile Products and Textile Floor Coverings sectors are compelled to innovate to meet changing customer needs and compete with imports.

Over the past decade, the Textile Floor Covering sector has adopted a range of new technologies and materials, including computerised colour coding and mixing, core stripping machines, dye injection technologies and digital pattern making.

Additionally, there has been a push to make production processes more environmentally friendly by reducing water, waste and energy consumption.

Carpet manufacturers are increasingly focused on responding to consumer demand for eco-friendly carpet solutions. These solutions include carpets made from natural and renewable fibres such as sisal, seagrass, coir, organic cotton, jute, organic wool, and bamboo.

Companies are enhancing product durability and extending their lifespan through stain-resistant technologies. This includes the application of sprays and the development of material blends that possess improved stain resistance.

Companies in the Cut and Sewn Products sector are investing in specialised technology and automation to streamline production processes, incorporating smart technologies in product design, making greater use of eco-friendly fabrics and improving the functionality of textile products. For example, Hunter Douglas Australia, the largest supplier of window coverings in Australia, has experienced success with the production of blinds and awnings with enhanced sound absorption capabilities, window insulation and child safety.

### 5.1.6 Occupations

In 2021-22, there were 8,604 people employed in the Cut and Sewn Textile Products sector and 1,584 employed in the Textile Floor Covering sector. 1,595 of these people held positions related explicitly to textile production in the Cut and Sewn Products sectors, and 375 held similar positions in the Textile Floor Covering sector. The remaining people worked in support roles, which include administration, procurement, sales, cleaning, transport and logistics, human resources and management positions. The ratio of production to support roles is lower than the broader TCF industry, where it is estimated that approximately 40% of the workforce is engaged in jobs specific to TCF production, while the remaining 60% work in essential support functions, many of which are common across various industries.

Figure 5.1.19 shows the various types of specialist production roles in the textiles manufacturing industry and their alignment with the Australian Qualifications Framework.

**Figure 5.1.19 Textile manufacturing industry - occupations and specialisations**

| AQF Level | | |
|---|---|---|
| 2 | Production Assistant | |
| 3 | Machine/Production Operator<br>• Yarn<br>• Cotton Ginner<br>• Gill Box Operator<br>• Yarn Comber<br>• Yarn Texture Operator<br>• Feltmaker<br>Woven<br>• Beamer<br>• Loom Operator<br>• Carpet Weaver<br>• Warper<br>• Tufting Machine | Operator<br>• Other Waving Machine Operator<br>Non-woven (Technical)<br>• Production Operator<br>Dyeing & Finishing<br>• Textile Dyer<br>• Textile Finisher<br>Rope, cordage & twine<br>• Net Maker<br>• Rope Making Machine<br>Printing<br>• Digital Services<br>• Fashion Digital Print Assistant |
| 4 | Canvas Goods Fabricator<br>Sail Maker<br>Textile Cutter<br>Leading Hand | |
| 5 | Textile Technologist | |
| 6 | Textile Designer<br>Production Manager | |

Figure 5.1.20 shows employment in specialised production roles according to the ANZSCO classification of occupations.

**Figure 5.1.20 Textile manufacturing industry - employment in specialised occupations (ANZSCO 4 and 6-digit level) in selected sectors, 2021**

| Occupations (ANZSCO 4 and 6-digit) | | Number of employees | |
|---|---|---|---|
| | | Cut and Sewn Textile Products | Textile Floor Coverings |
| 3931 Canvas and Leather Goods Makers | 39311 Canvas Goods Fabricator | 133 | 0 |
| | 393112 Leather Goods Maker | 4 | 0 |
| | 393113 Sail maker | 162 | 0 |
| | 393211 Apparel cutter | 30 | 0 |

| | | | |
|---|---|---|---|
| | 393213 Dressmaker or Tailor | 120 | 0 |
| | 393299 Clothing Trades Worker nec | 4 | 0 |
| 7117 Textile and Footwear Production Machine Operators | 711712 Hide and Skin Processing Machine Operator | 5 | 0 |
| | 711713 Knitting Machine Operator | 3 | 0 |
| | 711714 Textile Dyeing and Finishing Machine Operator | 0 | 9 |
| | 711715 Weaving Machine Operator | 0 | 85 |
| | 711716 Yarn Carding and Spinning Machine Operator | 0 | 12 |
| | 711799 Textile and Footwear Production Machine Operators nfd | 35 | 232 |
| | 711611 Sewing Machinist | 1076 | 24 |
| 8115 Laundry Workers | 811511 Laundry Worker [General] | 3 | 0 |
| | 811513 Ironer or Presser | 6 | 0 |
| 2323 Fashion, Industrial and Jewellery Designers | 232311 Fashion Designer | 0 | 0 |
| | 232312 Industrial Designer | 14 | 13 |
| Total | | 1595 | 375 |

### 5.1.7 Skill needs

In its latest industry report, IBISWorld noted that there will be little employment growth in the Textile Floor Covering sector and a likely decline in employment in the Cut and Sewn Products sector.

However, the adoption of automation and new manufacturing technologies, the focus on manufacture of premium products and the use of sustainable and environmentally friendly materials will drive demand for new skills in both sectors, including:

- materials technologists
- industrial designers
- mechatronics technicians
- 3D printing technicians
- process improvement specialists
- procurement specialists.

In addition, the ongoing demand for machine operators and production workers who perform cutting, shaping, sewing, glueing, pattern making and fabrication tasks will be exacerbated by the ageing workforce.

### 5.1.8 MST Training Package qualifications and skill sets

As illustrated in Figure 5.1.21, the current version of the *MST Textiles, Clothing and Footwear Training Package* [MST30519] includes a textile manufacturing pathway.

**Figure 5.1.21 Textile manufacturing qualification pathway**


The pathway comprises:

- *MST20722 Certificate II in Apparel, Fashion and Textiles* is a broad-based qualification for entry-level textile, clothing and footwear workers.
- The *MST30222 Certificate III in Manufactured Textile Products* provides trade-level technical skills to support fabricated textile product design, development, production and supply.
- The *MST40122 Certificate IV in Textile Design and Technology* is for individuals working in textile design, development and production.

#### 5.1.8.1 Registered training organisations offering training package qualifications

Figure 5.1.22 lists the registered training organisations [RTO] offering textile manufacturing qualifications. Only one RTO offers the *MST40122 Certificate IV in Textile Design and Technology*, and two provide the *MST30222 Certificate III in Manufactured Textile Products*.

**Figure 5.1.22 Registered training organisations – textile manufacturing qualifications on scope of registration**

| Registered training organisation | Jurisdiction |
|---|---|
| ***MST20722 Certificate II in Apparel, Fashion and Textiles*** | |
| Australian College of Training Pty Ltd | WA |
| Australian Institute of Fashion Design Pty Ltd | VIC |
| Bendigo Kangan Institute | VIC |
| Box Hill Institute | VIC |
| Catholic Archdiocese of Canberra and Goulburn Education Limited | ACT |
| Christian Community Ministries Ltd | QLD |
| Elisabeth Murdoch College | VIC |
| Holmesglen Institute | VIC |

| | |
|---|---|
| Lowood State High School | QLD |
| North Metropolitan TAFE | WA |
| Ripponlea Institute Pty Ltd | VIC |
| South Metropolitan TAFE | WA |
| South Regional TAFE | WA |
| Sunnybank State High School | QLD |
| Tactile Learning Centre Pty Ltd | QLD |
| TAFE Queensland | QLD |
| Technical and Further Education Commission | NSW |
| Young Rabbit Pty Ltd | NSW |
| ***MST30222 Certificate III in Manufactured Textile Products*** | |
| North Metropolitan TAFE | WA |
| Technical and Further Education Commission | NSW |
| ***MST40122 Certificate IV in Textile Design and Technology*** | |
| Royal Melbourne Institute of Technology | VIC |

*Source: training.gov.au Feb 2025*

### 5.1.8.2 Enrolment and completion of training package qualifications

Figures 5.1.23 and 5.1.24 show the number of enrolments and completions in the textile manufacturing qualifications.

**Figure 5.1.23 Enrolments in textile manufacturing qualifications 2023 – number of students**

| Qualification | Gender | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| MST20722 Certificate II in Apparel, Fashion and Textiles | Male | | | | | 20 |
| | Female | | | | | 10 |
| | Apprenticeship / traineeship | | | | | 5 |
| | Total | | | | | **30** |
| MST30222 Certificate III in Manufactured Textile Products | Male | 40 | 35 | 60 | 45 | 55 |
| | Female | 10 | 5 | 15 | 15 | 10 |
| | Apprenticeship / traineeship | 40 | 40 | 75 | 55 | 45 |
| | Total | **45** | **40** | **75** | **55** | **65** |
| MST40122 Certificate IV in Textile Design and Technology | Male | 10 | 5 | 10 | 10 | 15 |
| | Female | 75 | 55 | 70 | 75 | 85 |
| | Apprenticeship / traineeship | - | - | - | - | - |
| | Total | **80** | **65** | **80** | **85** | **105** |

*Source: NCVER Databuilder Feb. 2025*

*Note: Data for MST30222 and MST40122 for 2019-22 is based on previous versions of the qualifications*

**Figure 5.1.24 Completion of textile manufacturing qualifications 2023 – number of graduates**

| Qualification | Gender | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| MST20722 Certificate II in Apparel, Fashion and Textiles | Male | | | | | - |
| | Female | | | | | 10 |
| | Total | | | | | **10** |
| MST30222 Certificate III in Manufactured Textile Products | Male | 10 | 5 | 10 | - | 20 |
| | Female | - | - | - | - | 5 |
| | Total | **10** | **5** | **10** | **-** | **25** |
| MST40122 Certificate IV in Textile Design and Technology | Male | - | - | - | - | - |
| | Female | 30 | 20 | 20 | 15 | 20 |
| | Total | **30** | **20** | **20** | **15** | **20** |

*Source: NCVER Databuilder Feb. 2025*

*Note: Data for MST30222 and MST40122 for 2019-22 is based on previous versions of the qualifications*

### 5.1.8.3 Observations on the uptake of nationally recognised qualifications in textile manufacturing

There is limited uptake of the qualifications in the *MST Textiles, Clothing and Footwear Training Package* [MST30519] in the textile manufacturing sector, with most employees acquiring their skills through informal, on-the-job learning.

Enrolments in nationally recognised qualifications in textile manufacturing are very low, with only 200 students enrolling in the following qualifications in 2023:

- Certificate II in Apparel, Fashion, and Textiles (30 enrolments),
- Certificate III in Manufactured Textile Products (65 enrolments), and
- Certificate IV in Textile Design and Technology (105 enrolments).

Completion rates in these qualifications are also low. In 2023, only 55 individuals in total completed the following qualifications:

- Certificate II in Apparel, Fashion, and Textiles (10 completions),
- Certificate III in Manufactured Textile Products (25 completions), and
- Certificate IV in Textile Design and Technology (20 completions).

There is limited provision of these qualifications. Eighteen RTOs offer the Certificate II in Apparel, Fashion, and Textiles. However, only one Victorian-based RTO provides the Certificate IV in Textile Design and Technology, while two providers - one in New South Wales and the other in Western Australia - offer the Certificate III in Manufactured Textile Products.

There is significant potential to expand the provision of Recognition of Prior Learning (RPL) in textile manufacturing. Over half of nearly 14,000 employees in the sector have a secondary

school education as their highest qualification, with approximately 8% only having completed Year 9.

Additionally, the primary apprenticeship program in this sector, the Certificate III in Manufactured Textile Products, is male dominated, with only 10 out of the 55 apprentices enrolled in this program in 2023 being female.

## 5.2. Fashion and Apparel Manufacturing

### 5.2.1. Sector profile

This sector covers the design, production, and distribution of clothing and accessories for domestic and export markets, including millinery. The key activities conducted in this sector are listed in Figure 5.2.1.

**Figure 5.2.1 Fashion and Apparel Manufacturing activities covered by ANZSIC Classification**

| ANZIC industry class | Main activities | |
|---|---|---|
| 1351 Clothing Manufacturing | • Belt manufacturing (for clothing)<br>• Clothing accessory manufacturing n.e.c.<br>• Clothing manufacturing n.e.c.<br>• Clothing, fur, manufacturing<br>• Clothing, knitted fabric, manufacturing<br>• Clothing, leather, manufacturing<br>• Clothing, plastic or rubber, manufacturing<br>• Glove manufacturing (except rubber)<br>• Handkerchief manufacturing<br>• Hat and cap manufacturing<br>• Headwear manufacturing<br>• Helmet, fabric or leather, manufacturing<br>• Infants' clothing manufacturing | • Jeans manufacturing<br>• Laces manufacturing<br>• Men's and boys' wear manufacturing<br>• Outerwear manufacturing<br>• Sleepwear manufacturing<br>• Swimwear manufacturing<br>• Tie manufacturing<br>• Underwear manufacturing<br>• Uniform manufacturing<br>• Waterproof clothing manufacturing<br>• Wetsuit manufacturing<br>• Women's and girls' wear manufacturing<br>• Workwear manufacturing |
| 1340 Knitted Product Manufacturing | • Clothing, knitted, manufacturing<br>• Crocheted fabric manufacturing<br>• Custom knitting of pullovers or cardigans | • Knitted fabric manufacturing<br>• Panty hose manufacturing<br>• Sock manufacturing<br>• Stocking manufacturing<br>• Tights manufacturing |

| | |
|---|---|
| | • Hosiery manufacturing<br>• Jacket, knitted, manufacturing<br>• Jersey, knitted, manufacturing |
| 6924 Other Specialised Design Services | • Fashion and textile design |

*Source: Australian Bureau of Statistics, Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006 (Revision 2.0)*

Australia's Fashion and Apparel Manufacturing sector is diversified with the main subsectors being:

- Women's and Girls' Wear Manufacturing
- Men's and Boys' Wear Manufacturing
- Sleepwear, Underwear and Infant Clothing Manufacturing
- Knitted Product Manufacturing.

As shown in Figure 5.2.2, in 2024, 728 companies in these four sectors produced sales revenue of $1,091.7 million and employed 4,274 people.

**Figure 5.2.2 Fashion and Apparel Manufacturing – key indicators for selected types of enterprises**

| Sub sector | Sales revenue [$ million] | Number of Employees | Number of Enterprises |
|---|---|---|---|
| Women's and Girls' Wear Manufacturing | 557.9 | 2,175 | 502 |
| Men's and Boys' Wear Manufacturing | 258.1 | 1,008 | 91 |
| Knitted Product Manufacturing | 63.0 | 407 | 99 |
| Sleepwear, Underwear and Infant Clothing Manufacturing | 212.7 | 684 | 36 |
| Total | 1091.7 | 4,274 | 728 |

*Source: IBIS World 2024*

The fashion and apparel manufacturing industry is concentrated in Victoria and New South Wales (see Figure 5.2.3). Over 60% of manufacturers are based in these two states, which have a rich history in apparel production. Sydney and Melbourne are major hubs due to their proximity to downstream markets, including clothing retailers and wholesalers. Melbourne's strengths in textile production and innovation complement Sydney's design capabilities. The skilled workforce in these States benefits from strong educational institutions focused on fashion design and production.

**Figure 5.2.3 Location of Fashion and Apparel Manufacturing enterprises – women's and girls' wear**

| State/Territory | Establishments [% of total]<br>Women's and Girls' Wear Manufacturing |
|---|---|
| NSW | 39.9 |
| QLD | 19.5 |
| VIC | 24.5 |
| SA | 5.6 |
| WA | 8.4 |
| TAS | 1.3 |
| ACT | 0.6 |
| NT | 0.2 |

*Source: IBISWorld 2025*

According to the ABS in 2023, most fashion and apparel manufacturers were non-employing [53.7%] or employed less than four people [27.7%].

**Figure 5.2.4 Number and percentage of Fashion and Apparel Manufacturing businesses, 2023**

| ANZSIC Sub-sector | Non employing | 1-4 Employees | 5-19 Employees | 20-199 Employees | 200+ Employees | Total |
|---|---|---|---|---|---|---|
| Clothing Manufacturing | 1,609 [60.9%] | 689 [26.0%] | 254 [9.6%] | 84 [3.1%] | 6 [0.2%] | 2,642 |
| Knitted Product Manufacturing | 55 [58.5%] | 18 [19.1%] | 16 [17.0%] | 5 [5.3%] | 0 [0.0%] | 94 |

*Source: ABS, 2023, 8165.0 Counts of Australian Businesses, Entries and Exits, June 2019 to June 2023*

As indicated in Figure 5.2.4, over half the businesses operate without employees, as sole proprietorships and small-scale manufacturers. Over 90% of employing clothing manufacturing and knitting enterprises have fewer than 20 employees, reflecting the widespread presence of small-scale operations.

Over the last fifteen years, there has been a significant reduction in the number of fashion and apparel manufacturing businesses. For example, in 2007-8 in Australia, there were 1,016 enterprises manufacturing women's and girls' wear operating at 1,238 locations that employed 4,072 people. By 2024-5, this has declined to 502 enterprises operating at 614 locations and employing 2,175 people.

The fashion and apparel sector produces a diverse range of products. For example, as shown in Figure 5.2.5, the women's and girls' wear sector produces:

- shirts, blouses and T shirts

- dresses and suits
- pants, jeans, shorts and skirts
- cardigans, jumpers and coats,
- other clothing.

**Figure 5.2.5 Fashion and Apparel Manufacturing - women's and girls' wear 2025**

| Products | Total sales [$ million AUD] | Percentage of total sales |
|---|---|---|
| Shirt, blouses and T shirts | 169.9 | 30.4 |
| Dresses and suits | 136.7 | 24.5 |
| Pants, jeans, shorts and skirts | 100.4 | 18.0 |
| Cardigans, jumpers and coats, | 67.5 | 12.1 |
| Other clothing | 83.7 | 15.0 |

*Source: IbisWorld 2025*

According to IBISWorld, the demand for these different products is changing. Customisation and unique styles drive sales for shirts, blouses, and T-shirts. In contrast, dresses and suits are experiencing declining demand as consumer preferences shift towards casual wear. The pants, jeans, shorts, and skirts segment faces international competition but is showing growth in sustainable products. However, sales of cardigans, jumpers, and coats are declining due to seasonal demand fluctuations and the rise of fast fashion. Demand for other types of clothing, such as uniforms and workwear, has contracted, particularly as local manufacturers encounter a decrease in orders for larger contracts.

### 5.2.2 Economic landscape

The fashion and apparel industry is undergoing significant change. Many large-scale manufacturers have exited the industry or shifted production to lower-cost countries. Imported clothing products are expected to account for nearly 90.0% of domestic demand in 2024-25.

According to the latest IBIS World report, '…manufacturers face intense competition from low-cost imports, particularly as the Australian dollar appreciates, making international products more affordable. A strengthening dollar also weakens export competitiveness, reducing demand for Australian-made goods in global markets. Declining demand from department stores and a shift in consumer preferences towards online shopping are expected to contribute to a 2.7% revenue decline over the five years through 2024-25, to $557.9 million. This includes a 1.0% drop anticipated in 2024-25.

'Despite these challenges, growing consumer demand for ethically produced, eco-friendly clothing has provided a niche market opportunity for local brands, allowing them to charge premium prices and maintain a loyal customer base despite a cost-of-living crisis.

'Manufacturers are set to face persistent challenges in the coming years, with competition from low-cost imports maintaining pressure. Demand from online retailing is poised to rise, while department stores are set to further contract as a share of revenue.

'Manufacturers prioritising sustainable fashion and adaptable production methods will likely find greater success in maintaining profitability. The combination of rising consumer income and expanding digital retail channels offers growth potential, but only for those manufacturers agile enough to adapt to shifting market conditions. Technological advances, like automation and data-driven design, will also be vital to remaining competitive.'

Other factors influencing the industry include the barriers local companies face when trying to secure government clothing contracts, increasing consumer demand for high quality fashion products is leading retailers to source more goods from international rather than domestic manufacturers, and the signing of free trade agreements such as the China-Australia Free Trade Agreement in 2015-16 and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership in 2017-18. These agreements eliminated tariffs on goods, facilitating increased clothing imports from countries like China and Vietnam.

Overall, industry revenue is forecast to decrease. For example, the manufacturing sector of women's and girls' wear is projected to decline by 1.0% through the end of 2029-30, falling to $530.9 million. Similarly, declines are predicted in the men's and boys' wear, sleepwear, and knitted products sectors.

### 5.2.3 Demographics

There were 11,858 people employed in the Fashion and Apparel Manufacturing industry at the time of the ABS 2021 Census of Population and Housing.

At that time, as shown in Figures 5.2.6 and 5.2.7, women comprised 76% and 59% of the clothing manufacturing and knitted products workforce, respectively. Indigenous people formed 1% or less of the clothing manufacturing and knitted products workforce.

**Figure 5.2.6 Fashion and Apparel Manufacturing - gender of workforce 2021**

| Industry sector | % of total workforce | |
|---|---|---|
| | Male | Female |
| Clothing Manufacturing | 24 | 76 |
| Knitted Product Manufacturing | 41 | 59 |

*Source: Census of Population and Housing, 2021*

**Figure 5.2.7 Fashion and Apparel Manufacturing - employment of First Nations people 2021**

| Industry sector | % of total workforce | |
|---|---|---|
| | Indigenous | Non-Indigenous |
| Clothing Manufacturing | 1 | 99 |
| Knitted Product Manufacturing | 0 | 100 |

*Source: Census of Population and Housing, 2021*

Most people working in the industry in 2021, as shown in Figure 5.2.8, were born in Australia (59% - Clothing Manufacturing and 60% Knitted Goods Manufacturing). There was a significant number of workers who were born in Asia (28% - Clothing Manufacturing and 26% Knitted Goods Manufacturing), particularly South-East Asia (16% - Clothing Manufacturing and 17% Knitted Goods Manufacturing).

**Figure 5.2.8 Fashion and Apparel Manufacturing - employment of culturally and linguistically diverse people 2021**

| Region of birth | % of workforce | |
|---|---|---|
| | Clothing Manufacturing | Knitted Product Manufacturing |
| Australia | 59 | 60 |
| South-East Asia | 16 | 17 |
| North-East Asia | 9 | 6 |
| Southern and Central Asia | 3 | 3 |
| North-West Europe | 5 | 5 |
| Southern and Eastern Europe | 4 | 7 |
| Sub Saharan Africa | 2 | 1 |
| North Africa and the Middle East | 1 | 0 |
| Americas | 2 | 0 |

*Source: Census of Population and Housing, 2021*

There is a notable concentration of older workers in the Fashion and Apparel Manufacturing industry. As shown in Figure 5.2.9, the most significant portion of the workforce fell within the 50-59 age group, (26% - Clothing Manufacturing and 26% Knitted Goods Manufacturing). Overall, 60% of workers in the clothing manufacturing and knitted products sectors were aged over 40. This suggests that many experienced workers will retire shortly. As a result, there is an urgent need for focused recruitment, training, and retention initiatives directed at younger people to ensure the industry's long-term operational stability.

The fashion and apparel manufacturing industry has a relatively low representation of younger workers. The 20-29 age group accounts for only 17% of the clothing production workforce, and only 8% of the knitted products sector. The low number of younger workers is attributable to the industry's limited appeal to young workers, inadequate efforts to recruit and retain young people, the availability of relevant training and education programs, and the perceived lack of career prospects within the sector. If this trend persists, the industry is likely to face ongoing skill shortages, which are exacerbated by the retirement of older workers.

**Figure 5.2.9 Fashion and Apparel Manufacturing - age distribution of workforce 2021**

| Age Structure | % of workforce | |
|---|---|---|
| | Clothing Manufacturing | Knitted Product Manufacturing |
| 15-19 years | 2 | 1 |
| 20-29 years | 17 | 8 |
| 30-39 years | 17 | 16 |
| 40-49 years | 19 | 21 |
| 50-59 years | 26 | 26 |
| 60-69 years | 16 | 22 |
| 70-79 years | 3 | 7 |

*Source: Census of Population and Housing, 2021*

As shown in Figure 5.2.10, just over half of the people working in the Knitted Products Manufacturing sector have secondary education as their highest level of education. This includes 11% who have completed Year 9 and below and 40% who have completed Year 10 and above. While the levels of educational attainment are similar in the clothing production sector, it is interesting to note that 20% of people in the Clothing Manufacturing sector hold a bachelor's degree or higher compared with 20% in the Knitted Products Manufacturing sector.

**Figure 5.2.10 Fashion and Apparel Manufacturing - education level of workforce 2021**

| Level of education | % of workforce | |
|---|---|---|
| | Clothing Manufacturing | Knitted Product Manufacturing |
| Secondary education – Year 9 and below | 7 | 11 |
| Secondary education – Year 10 and above | 38 | 40 |
| Certificate III and IV | 13 | 15 |
| Advanced Diploma and Diploma | 17 | 14 |
| Bachelor's degree | 20 | 15 |
| Graduate Diploma and Graduate Certificate | 1 | 1 |
| Postgraduate degree | 4 | 4 |

*Source: Census of Population and Housing, 2021*

### 5.2.4 New technologies and materials

Large and smaller scale manufacturers are embracing new technologies and materials to boost product quality, respond to the need for more sustainable products, address skill shortages and remain competitive.

Implementing advanced sewing, cutting, and finishing automation boosts production speed and precision, reduces manual labour and operational costs, and enhances overall efficiency and quality standards.

Companies have implemented enterprise resource planning (ERP) and customer relationship management (CRM) systems to manage all their finance, HR, manufacturing, supply chain, sales, and procurement functions and automated logistics systems to improve the efficiency of their warehousing and distribution centre operations.

Manufacturers use advanced textiles with embedded technology, such as moisture control and UV protection, to cater to consumer demand for high-performance, multifunctional clothing. At the same time, they are increasingly utilising biodegradable materials, which provide environmentally friendly alternatives to traditional fabrics and can help reduce landfill waste.

Technologies like 3D print–knit allow for customisation and on-demand production, reducing waste and enabling rapid prototyping and design iteration. 3D knitting and 3D print-knit technologies use knitting machines to create three-dimensional objects and clothing. The process involves using a computer to design the object and then knitting it using a machine. 3D knitting can be used to create a variety of clothing items, including shoes, jackets, and sportswear.

AI-driven data analytics optimises inventory management and anticipates fashion trends, helping manufacturers respond more quickly to market changes and consumer preferences.

The adoption of circularity and sustainability principles in fashion and apparel manufacturing emphasises the importance of designing clothes with recyclability in mind. This approach encourages fashion designers to utilise materials, construction techniques, and technologies that ensure used garments can be transformed into reusable raw materials. Manufacturers will require people with skills in sustainable production processes, the ability to manage closed loop manufacturing systems, waste management and circular supply chains, including take back programs and recycling systems.

## Case study: Citizen Wolf

*This case study shows how advanced manufacturing technologies can reduce emissions and waste.*

Citizen Wolf is a Sydney-based clothing manufacturer that uses 'Magic Fit' technology to create custom-fit clothing for its clients. Their innovative approach focuses on producing only what is sold and recycling old clothes into new fabrics, significantly reducing landfill waste. They maintain zero inventory by operating on a made-to-order model, which translates to zero waste. Rather than producing clothing anticipating consumer purchases, Citizen Wolf allows customers to specify their desired items, which are then crafted accordingly. This on-demand system produces only half the carbon emissions per garment compared to the mass-produced fashion industry.

### 5.2.5 Occupations

In 2021, 4,590 people employed in the fashion and apparel manufacturing industry, held positions related explicitly to apparel production. The remaining people worked in support roles, which include administration, procurement, human resources, logistics and management positions.

Figure 5.2.11 illustrates the various types of specialist fashion and apparel production roles and their alignment with the Australian Qualifications Framework.

**Figure 5.2.11 Fashion and Apparel manufacturing - occupations and specialisations in the TCF industry**

| AQF Level | Fashion and Apparel Manufacturing |
|---|---|
| 2 | Production Assistant |
| 3 | Machine/Production Operator:<br>• Sewing Machinist<br>• Embroidery Machinist<br>Knitting<br>• Flat Bed Knitter<br>• Warp Knitter<br>Milliner Assistant<br>Fabric Agents (source fabric) |
| 4 | Apparel Cutter<br>Tailor / Dress Maker / Costume Maker<br>Pattern Maker / Grader (Clothing)<br>Sample Garment Maker / Sample Machinist<br>Milliner / Milliner Technician<br>Leading hand |
| 5 | Trend Forecaster |
| 6 | Fashion Designer<br>Production Manager |

**Figure 5.2.12 Fashion and Apparel Manufacturing – employment in specialised occupations (ANZSCO 4 and 6-digit level) by sector, 2021**

| Occupations (ANZSCO 4 and 6-digit) | | Number of employees |
|---|---|---|
| 3931 Canvas and Leather Goods Makers | 393112 Leather Goods Maker | 13 |
| | 393211 Apparel Cutter | 124 |
| | 393212 Clothing Patternmaker | 163 |
| | 393213 Dressmaker or Tailor | 1648 |
| | 393299 Clothing Trade Worker nec | 88 |
| | 711711 Footwear Production Machine Operator | 4 |
| | 711713 Knitting Machine Operator | 27 |

| | | |
|---|---|---|
| 7117 Textile and Footwear Production Machine Operators | 711714 Textile Dyeing and Finishing Machine Operator | 8 |
| | 711715 Weaving Machine Operator | 3 |
| | 711799 Textile and Footwear Production Machine Operators nfd | 17 |
| | 711611 Sewing Machinist | 1696 |
| 8115 Laundry Workers | 81511 Laundry Worker [General] | 4 |
| | 811513 Ironer or Presser | 24 |
| 2323 Fashion, Industrial and Jewellery Designers | 232311 Fashion Designer | 495 |
| | 232312 Industrial Designer | 26 |
| 3232 Metal Fitters and Machinists | 32315 Textile clothing and footwear mechanic | 250 |
| Total | | 4590 |

The industry's two largest specialist occupations in 2021 were Dressmakers or Tailors and Sewing Machinists. Compared with all occupations in the Australian workforce (see Figure 5.2.13), workers in these two occupations tend to be older, have lower educational attainment, are female and are more likely to be approaching retirement age.

**Figure 5.2.13 Fashion and Apparel manufacturing – key employment-related characteristics of major specialist occupational groups**

| Characteristics | All Occupations in Australian Workforce | Dressmakers or Tailors | Sewing Machinists |
|---|---|---|---|
| Highest level of educational attainment – Year 12 and below | 26.0% | 47.1% | 61.2% |
| Median age | 40 years | 50 years | 57 years |
| Female share of employment | 49% | 85% | 76% |
| Share of workers who work full-time hours | 64% | 42% | 66% |
| Average full-time hours worked per week | 35 hours | 43 hours | 40 hours |
| % of workforce aged 45 years and older | 40.6% | 60.7% | 70.1% |

*Source: Jobs and Skills Australia based on ABS, 2021 Census of Population and Housing*

### 5.2.6 Skill needs

The latest industry reports produced by IBISWorld noted that employment will decline in the Fashion and Apparel Manufacturing sector.

However, the industry faces a looming shortage of workers in critical occupations. Of particular concern is the nationwide shortage of TCF mechanics. This issue is exacerbated by a lack of new entrants into the field, an ageing existing workforce, and an increasing demand for the trade and

technician skills necessary to install, service, and repair the highly automated, integrated, and digitised equipment commonly found in modern textile plants.

TCF mechanics are responsible for setting up, adjusting, and maintaining industrial or domestic sewing machines and machines that produce yarn, textiles, or footwear. Their tasks include:

- setting guides, stops, and other controls on machining tools
- configuring and adjusting controls for textile machines
- diagnosing faults and performing routine operational maintenance, overhauls, and repairs
- occasionally erecting machines and equipment on-site.

The TCF mechanic workforce is ageing. Of 250 TCF mechanics employed in Australia, 22% are aged between 55 and 59 and 20% are aged 65 and older. The median age of TCF mechanics is 57, compared to 40 for all other occupations.

A recurring issue discussed during consultations with TCF manufacturers was the ageing of the TCF mechanics workforce and the low number of young people enrolling in the apprenticeship program. This issue is exacerbated by the difficulty in attracting younger workers to the occupation and the increasing skill requirements that come with the adoption of advanced manufacturing technologies. The responsibility for training TCF Textile Mechanics spans two Jobs and Skills Councils. A collaborative effort between these two councils will be necessary to ensure a viable training response to address this critical skill shortage.

Other occupations identified as being in-demand include:

- pattern makers
- cutters
- sewing machinists
- sewers
- construction workers
- production workers.

The adoption of automation, the use of advanced manufacturing technologies, and the introduction of advanced and biodegradable materials is driving demand for new skills in the industry, such as:

- materials technologists
- fashion designers
- sustainability consultants
- mechatronics technicians
- 3D printing technicians
- process improvement specialists
- procurement specialists

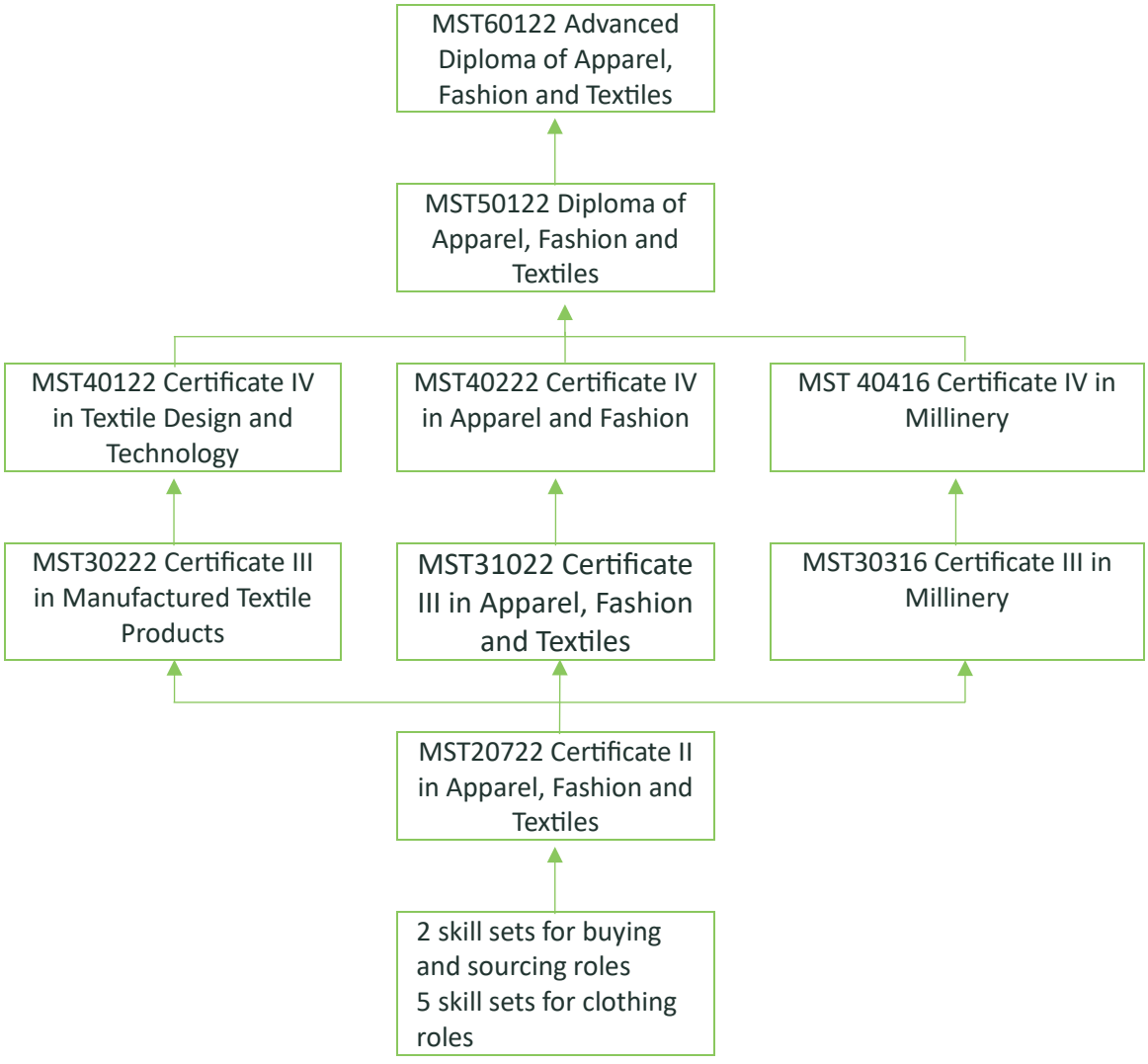
- logistics specialists.

Circularity and sustainability are becoming integral principles in TCF as the industry works to reduce its environmental impact. The adoption of these principles mean that manufacturers will require people with skills in sustainable production processes, the ability to manage closed loop manufacturing systems, waste management and circular supply chains, including take back programs and recycling systems.

### 5.2.7 MST Training Package qualifications and skill sets

As illustrated in Figure 5.2.14, the current version of the *MST Textiles, Clothing and Footwear Training Package* [MST30519] includes a Fashion and Apparel Manufacturing pathway.

**Figure 5.2.14 Fashion and Apparel Manufacturing qualification pathway**




The *MST20722 Certificate II in Apparel, Fashion and Textiles* is a broad-based qualification for entry-level textile, clothing and footwear workers. Individuals undertaking this program may complete a range of specialisations.

There are four integrated qualifications in apparel, fashion and textiles. These are:

- *MST31022 Certificate III in Apparel, Fashion and Textiles* for those who work in production-related roles.
- *MST40222 Certificate IV in Apparel and Fashion* for those working as design assistants, merchandising assistants and specialist production technicians, such as patternmakers and sewing machinists. These individuals support design and production in the apparel and fashion industry.
- *MST50122 Diploma of Apparel, Fashion and Textiles* for assistant designers, assistant product developers, patternmakers, and production supervisors in the apparel, textile and fashion industries.
- *MST60122 Advanced Diploma of Apparel, Fashion and Textiles* for designers, product developers, senior patternmakers and production managers as well as those in assistant positions in marketing, buying and visual merchandising.

There are two millinery qualifications. These are the *MST30316 Certificate III in Millinery* and *MST 40416 Certificate IV in Millinery*.

In addition, there is *MST30222 Certificate III in Manufactured Textile Products* and *MST40122 Certificate IV in Textile Design and Technology,* which are for people working in diverse areas of textile design, development and production roles.

There are also 7 skill sets that are relevant to this sector.

#### 5.2.7.1 Registered training organisations offering training package qualifications

Figure 5.2.15 lists the RTOs that have the fashion and apparel qualifications on their scope of registration. This list is current as of 1 March 2025.

**Figure 5.2.15 Registered training organisations – qualifications on scope of registration**

| Registered Training Organisation | Jurisdiction |
|---|---|
| ***MST20722 Certificate II in Apparel, Fashion and Textiles*** | |
| Australian College of Training Pty Ltd | WA |
| Australian Institute of Fashion Design Pty Ltd | VIC |
| Bendigo Kangan Institute | VIC |
| Box Hill Institute | VIC |
| Catholic Archdiocese of Canberra and Goulburn Education Limited | ACT |
| Christian Community Ministries Ltd | QLD |
| Elisabeth Murdoch College | VIC |
| Holmesglen Institute | VIC |
| Lowood State High School | QLD |
| North Metropolitan TAFE | WA |
| Ripponlea Institute Pty Ltd | VIC |
| South Metropolitan TAFE | WA |
| South Regional TAFE | WA |
| Sunnybank State High School | QLD |

| | |
|---|---|
| Tactile Learning Centre Pty Ltd | QLD |
| TAFE Queensland | QLD |
| Technical and Further Education Commission | NSW |
| Young Rabbit Pty Ltd | NSW |
| ***MST31022 Certificate III in Apparel, Fashion and Textiles*** | |
| Canberra Institute of Technology | ACT |
| TAFE Queensland | QLD |
| VICSEG New Futures | VIC |
| Charlton Brown Pty Ltd | QLD |
| Royal Melbourne Institute of Technology | VIC |
| Bendigo Kangan Institute | VIC |
| Tactile Learning Centre Pty Ltd | QLD |
| Australian Institute of Fashion Design Pty Ltd | VIC |
| TAFE SA | SA |
| Brighton Pacific Pty. Ltd | QLD |
| Department of Training and Workforce Development | WA |
| South Metropolitan TAFE | WA |
| South Regional TAFE | WA |
| TasTAFE | TAS |
| Technical and Further Education Commission | NSW |
| ***MST40222 Certificate IV in Apparel and Fashion*** | |
| Holmesglen Institute | VIC |
| VICSEG New Futures | VIC |
| Bendigo Kangan Institute | VIC |
| Brighton Pacific Pty Ltd | Qld |
| North Metropolitan TAFE | WA |
| South Metropolitan TAFE | WA |
| ***MST50122 Diploma of Apparel, Fashion and Textiles*** | |
| Canberra Institute of Technology | ACT |
| TAFE Queensland | QLD |
| Charlton Brown Pty Ltd | QLD |
| Bendigo Kangan Institute | VIC |
| Australian Institute of Fashion Design Pty Ltd | VIC |
| Virtu Design Institute Pty Limited | VIC |
| TAFE SA | SA |
| Brighton Pacific Pty Ltd | QLD |
| Department of Training and Workforce Development | WA |
| North Metropolitan TAFE | WA |
| South Metropolitan TAFE | WA |
| Technical and Further Education Commission | NSW |

| | |
|---|---|
| Young Rabbit Pty Ltd | NSW |
| ***MST60122 Advanced Diploma of Apparel, Fashion and Textiles*** | |
| Virtu Design Institute Pty Limited | VIC |
| Brighton Pacific Pty Ltd | QLD |
| Department of Training and Workforce Development | WA |
| North Metropolitan TAFE | WA |
| South Metropolitan TAFE | WA |
| Technical and Further Education Commission | NSW |
| Young Rabbit Pty Ltd | NSW |
| ***MST30316 Certificate III in Millinery*** | |
| Technical and Further Education Commission | NSW |
| ***MST 40416 Certificate IV in Millinery*** | |
| Bendigo Kangan Institute | VIC |
| ***MST30222 Certificate III in Manufactured Textile Products*** | |
| North Metropolitan TAFE | WA |
| Technical and Further Education Commission | NSW |
| ***MST40122 Certificate IV in Textile Design and Technology*** | |
| Royal Melbourne Institute of Technology | VIC |

*Source: training.gov.au Feb 2025*

### 5.2.7.2 Enrolment and completion of training package qualifications

In 2023, there were 5,330 total enrolments in all MST Training Package qualifications. Of these 4,340 [81.4%] enrolments were in fashion and apparel qualifications. Figure 5.2.16 shows the number of enrolments in these qualifications in 2019-2023. Of the 4,340 enrolments in fashion and apparel qualifications, 2,130 [49.0%] were at Certificate II level and 1,020 [23.5%] were at diploma / advanced diploma level.

**Figure 5.2.16 Enrolments in selected Fashion and Apparel Manufacturing qualifications 2023 – number of students**

| Qualification | Gender | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| MST20616 Certificate II in Applied Fashion Design and Technology - superseded | Male | 185 | 255 | 280 | 225 | 220 |
| | Female | 1480 | 1495 | 1645 | 1910 | 1865 |
| | Apprenticeship / traineeship | *5* | *5* | 15 | 35 | 20 |
| | **Total** | **1775** | **1760** | **1945** | **2185** | **2130** |
| MST20722 Certificate II in Apparel, Fashion and Textiles - current | Male | - | - | - | - | 10 |
| | Female | - | - | - | - | 20 |
| | Apprenticeship / traineeship | - | - | - | - | *5* |
| | **Total** | **-** | **-** | **-** | **-** | **30** |

| | | | | | | |
|---|---|---|---|---|---|---|
| MST30819 – Certificate III in Applied Fashion Design and Technology – superseded | Male | - | 10 | 105 | 110 | 125 |
| | Female | - | 65 | 815 | 825 | 835 |
| | Apprenticeship / traineeship | - | - | - | 5 | 5 |
| | **Total** | **-** | **75** | **930** | **950** | **980** |
| MST31022 Certificate III in Apparel, Fashion and Textiles - current | Male | - | - | - | - | 10 |
| | Female | - | - | - | - | 105 |
| | Apprenticeship / traineeship | - | - | - | - | - |
| | **Total** | **-** | **-** | **-** | **-** | **115** |
| MST40519 Certificate IV in Applied Fashion Design and Merchandising – superseded | Male | - | 15 | 15 | 10 | 10 |
| | Female | - | 105 | 75 | 55 | 50 |
| | Apprenticeship / traineeship | - | | - | - | - |
| | **Total** | - | 120 | 90 | 65 | 65 |
| MST40222 Certificate IV in Apparel and Fashion - current | Male | - | - | - | - | - |
| | Female | - | - | - | - | - |
| | Apprenticeship / traineeship | - | - | - | - | - |
| | Total | - | - | - | - | - |
| MST50116/119 Diploma of Applied Fashion Design and Merchandising – superseded | Male | 135 | 115 | 140 | 140 | 125 |
| | Female | 720 | 725 | 880 | 805 | 715 |
| | Apprenticeship / traineeship | - | - | - | - | - |
| | **Total** | **855** | **845** | **1030** | **955** | **860** |
| MST50122 Diploma of Apparel, Fashion and Textiles - current | Male | - | - | - | - | - |
| | Female | - | - | - | - | - |
| | Apprenticeship / traineeship | - | - | - | - | - |
| | **Total** | **-** | **-** | **-** | **-** | **-** |
| MST60116/119 Advanced Diploma of Applied Fashion Design and Merchandising – superseded | Male | 20 | 35 | 35 | 20 | 30 |
| | Female | 165 | 160 | 160 | 115 | 130 |
| | Apprenticeship / traineeship | - | - | - | - | - |
| | **Total** | **185** | **200** | **190** | **135** | **160** |
| MST60122 Advanced Diploma of Apparel, Fashion and Textiles – current | Male | - | - | - | - | - |
| | Female | - | - | - | - | - |
| | Apprenticeship / traineeship | - | - | - | - | - |

| | | | | | | |
|---|---|---|---|---|---|---|
| | **Total** | **-** | **-** | **-** | **-** | **-** |
| MST30316 Certificate III in Millinery - current | Male | - | - | - | - | *5* |
| | Female | - | - | - | - | *55* |
| | Apprenticeship / traineeship | - | - | - | - | - |
| | **Total** | **-** | **-** | **-** | **-** | **60** |
| MST 40416 Certificate IV in Millinery – current | Male | - | - | - | - | - |
| | Female | - | - | - | - | 10 |
| | Apprenticeship / traineeship | - | - | - | - | - |
| | **Total** | **-** | **-** | **-** | **-** | **10** |
| MST30222 Certificate III in Manufactured Textile Products – current | Male | - | - | - | - | 20 |
| | Female | - | - | - | - | - |
| | Apprenticeship / traineeship | - | - | - | - | 15 |
| | **Total** | **-** | **-** | **-** | **-** | **20** |
| MST40122 Certificate IV in Textile Design and Technology – current | Male | - | - | - | - | 15 |
| | Female | - | - | - | - | 85 |
| | Apprenticeship / traineeship | - | | | | - |
| | **Total** | **-** | **-** | **-** | **-** | **105** |

*Source: NCVER Databuilder Feb. 2025*

Figure 5.2.17 shows the number of completions of fashion and apparel qualifications in 2019-23. While it is not always possible to directly compare enrolment and completion data in any one year, it appears that there is a high rate of non-completion of fashion and apparel qualifications. For example, in 2023, there were 2,160 enrolments and 635 completions of Certificate II level qualifications. Similar non-completion rates can be seen at other qualification levels.

**Figure 5.2.17 Completion of Fashion and Apparel Manufacturing qualifications 2023 – number of graduates**

| Qualification | Gender | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| MST20616 Certificate II in Applied Fashion Design and Technology - superseded | Male | 70 | 60 | 120 | 90 | 60 |
| | Female | 440 | 440 | 395 | *475* | *555* |
| | Other / Not known | *55* | - | *5* | *5* | *5* |
| | **Total** | **565** | **500** | **515** | **575** | **625** |
| MST20722 Certificate II in Apparel, Fashion and Textiles - current | Male | - | - | - | - | - |
| | Female | - | - | - | - | 10 |
| | **Total** | **-** | **-** | **-** | **-** | **10** |

| | | | | | | |
|---|---|---|---|---|---|---|
| MST30819 – Certificate III in Applied Fashion Design and Technology – superseded | Male | - | - | 35 | 35 | 40 |
| | Female | - | 20 | 260 | 260 | 345 |
| | Other / Not known | - | - | *5* | *5* | *5* |
| | **Total** | | **20** | **295** | **300** | **390** |
| MST31022 Certificate III in Apparel, Fashion and Textiles - current | Male | - | - | - | - | - |
| | Female | - | - | - | - | - |
| | **Total** | **-** | **-** | **-** | **-** | **-** |
| MST40519 Certificate IV in Applied Fashion Design and Merchandising – superseded | Male | - | - | *5* | *5* | *5* |
| | Female | - | 40 | 25 | 20 | 20 |
| | Other / Not known | - | - | - | - | - |
| | **Total** | **-** | **45** | **25** | **25** | **25** |
| MST40222 Certificate IV in Apparel and Fashion - current | Male | - | - | - | - | - |
| | Female | - | - | - | - | - |
| | **Total** | **-** | **-** | **-** | **-** | **-** |
| MST50116/119 Diploma of Applied Fashion Design and Merchandising - superseded | Male | 20 | 20 | 15 | 40 | 35 |
| | Female | 175 | 155 | 150 | 215 | 220 |
| | Other / Not known | - | - | - | - | - |
| | **Total** | **190** | **170** | **165** | **255** | **255** |
| MST50122 Diploma of Apparel, Fashion and Textiles - current | Male | - | - | - | - | - |
| | Female | - | - | - | - | - |
| | **Total** | **-** | **-** | **-** | **-** | **-** |
| MST60116/119 Advanced Diploma of Applied Fashion Design and Merchandising - superseded | Male | *5* | 10 | 10 | *5* | 10 |
| | Female | *75* | *45* | *55* | *55* | 50 |
| | Other / Not known | - | - | - | - | - |
| | **Total** | **80** | **55** | **65** | **60** | **60** |
| MST60122 Advanced Diploma of Apparel, Fashion and Textiles - current | Male | - | - | - | - | - |
| | Female | - | - | - | - | - |
| | **Total** | **-** | **-** | **-** | **-** | **-** |
| MST30316 Certificate III in Millinery - current | Male | - | - | - | - | - |
| | Female | - | - | - | - | 20 |
| | **Total** | **-** | **-** | **-** | **-** | **20** |
| MST 40416 Certificate IV in Millinery - current | Male | - | - | - | - | - |
| | Female | - | - | - | - | *5* |
| | **Total** | **-** | **-** | | **-** | **5** |
| | Male | - | - | - | - | 20 |

| | | | | | | |
|---|---|---|---|---|---|---|
| MST30222 Certificate III in Manufactured Textile Products - current | Female | - | - | - | - | 5 |
| | **Total** | **-** | **-** | **-** | **-** | **25** |
| MST40122 Certificate IV in Textile Design and Technology - current | Male | - | - | - | - | - |
| | Female | - | - | - | - | 20 |
| | **Total** | **-** | **-** | **-** | **-** | **20** |

*Source: NCVER Databuilder Feb. 2025*

#### 5.2.7.3 Observations on the uptake of nationally recognised fashion and apparel qualifications

There is a high uptake of fashion and apparel qualifications, with over 80% of all enrolments in MST Training Package qualifications being in fashion and apparel.

However, there is also a relatively high non-completion rate. For example, in 2019-2023, there were 870 enrolments in advanced diploma qualifications but only 360 completions.

Despite the high number of enrolments in fashion and apparel qualifications, industry representatives have pointed out critical shortages of production-oriented staff, including textile mechanics, pattern makers and machinists. While the high rate of non-completions may partly explain this issue, a more likely reason is that enrolment numbers are influenced by supply-side factors and students' preference for skill development leading to careers in fashion. In other words, there is a mismatch between the supply of graduates with fashion skills and industry demand for production skills. Additional research is required to assess the extent of the mismatch and the potential underutilisation of fashion skills and shortage of production skills in the fashion and apparel sector.

There is considerable potential to enhance the provision of Recognition of Prior Learning (RPL) in the fashion and apparel industries. In the clothing production sector, 45% of employees hold a secondary school education as their highest qualification, while in the knitted product sector, this figure rises to 51%. Additionally, around 7% of those working in clothing production and 11% in knitted product manufacturing have only completed Year 9 education.

### 5.2.8 First Nations clothing production

First Nations clothing production is an emerging niche industry that showcases the richness of First Nations culture, art, and expertise. Designers from First Nations backgrounds use their creations to share their cultural heritage, challenge colonialism, and enhance Indigenous visibility. This industry encompasses community-controlled business development, employment opportunities, and creative engagement.

The clothing production sector can be political, as many designers aim to confront colonial narratives and share important cultural stories. Additionally, it can be sustainable, with designers striving to develop a self-sustaining ecosystem.

Participants in consultations highlighted the challenges of attracting workers to this industry. An aging workforce and a limited number of young people interested in careers in textile, clothing, and footwear manufacturing are contributing to skill shortages. Notably, women represent the largest group of workers within First Nations clothing production.

In the Northern Territory, First Nations individuals who obtain construction clothing and apparel qualifications often do not engage in formal employment. Some pursue skills for personal interest, while others create small clothing lines. However, relatively few Indigenous people are employed by manufacturers. Participants emphasised the need for awareness-raising activities to inform First Nations communities about job opportunities and career pathways within the TCF industry.

Consultations also revealed that employers do not prioritise nationally recognised qualifications, often preferring candidates with hands-on skills gained through practical experience. Although there is some scepticism regarding the MST Training Package qualifications, employers acknowledged that formal training is valuable, provided it meets the needs of both the companies and their employees.

## Case study: Clothing the Gaps

*The following case study highlights the workforce challenges and labour shortages experienced by one First Nations clothing production company, Clothing the Gaps.*

Located in Brunswick, Victoria, Clothing the Gaps is a fresh and dynamic community brand managed by health professionals that celebrates Aboriginal people and culture. The organisation was recognised for excellence at the 2020 Dreamtime Awards and was awarded 'Business of the Year'.

Clothing The Gaps is a Victorian Aboriginal-led, controlled, and majority Aboriginal-owned business and social enterprise, co-founded by Laura Thompson (Gunditjmara) and Sarah Sheridan (non-Indigenous).

The name 'Clothing the Gaps' is a play on the words 'Closing the Gap', which is an Australian Government health initiative to help close the life expectancy gap between Aboriginal people and non-Indigenous Australians.

The organisation makes clothes with 'Mob' as their purpose and mission. 'Ally Friendly' and 'Mob Only' are unique to their labels. These labels were introduced because some non-Indigenous customers were unsure if they could wear the garments. The clothing brand influences and unites people through fashion and causes so Aboriginal people and Communities can thrive.

Clothing The Gaps is certified as a Victorian Aboriginal business with Kinaway Chamber of Commerce Victoria and certified as an Aboriginal business with Supply Nation. As a Social Enterprise, they are a profit for purpose business and are registered and certified with Social Traders. The organisation is a certified B Corporation Australia (March 2022), holds an Ethical Clothing Australia accreditation, is a member of the Australian Fashion Council and is a member and signatory of the Indigenous Art Code.

Major labour shortages exist among machinists and sewers. This is partly due to the ageing workforce. Younger people who are vocationally orientated need to be exposed to an awareness campaign to make careers attractive. Clothing the Gaps, and the Australian companies that it outsources production work to, have an ongoing need for production staff and sewing experts.

**Many of these companies have ageing systems and require capital to modernise. Sarah commented, 'the Australian Government is not**

**pulling the levers on textiles to make it sustainable. Manufacturing in Australia has very low margins. Manufacturers who make in Australia contribute significantly to the economy, workforce and training system…a rebate is a way to give back to this commitment'.**

## Case study Albertini Clothing and Apparel

*The following case study highlights the problems that onshore, First Nations manufacturers have in attracting job ready workers.*

Adriana Albertini developed her knowledge and skills in construction and fitting by working for various companies that specialise in menswear, lingerie, and made-to-measure bridal wear. This experience equipped her with the expertise to launch her fashion label.

Her fashion house manufactures clothing in Australia, using Aboriginal printed fabrics sourced from remote communities. Each gown is unique in its print, design, or colour, highlighting the art and artist that inspired it. The collection includes casual wear, day wear, and evening pieces. By incorporating artwork from Indigenous artists, each garment tells its own story and carries a distinct identity. The fabrics are printed by the artists using their original artwork, which Adriana then uses to design the garments, showcasing the prints beautifully. With no two designs alike, every woman can confidently wear these gowns as wearable pieces of art and share the stories behind their creation.

The company employs three trainees who cut, design, and sew garments to measure. One significant challenge facing Adriana's company is the shortage of skilled individuals who sew and construct clothing.

In Darwin, few school leavers pursue careers in the textile, clothing, and footwear industries. Adriana believes many young people are unaware of the career opportunities in clothing design and production. This situation is further complicated by the lack of a training provider in the Northern Territory that offers the necessary qualifications in the MST Training Package. To address this gap, Adriana provides her staff with on-the-job training in production, construction, and cutting. Additionally, she conducts sewing, machining, and construction classes for First Nations communities in rural and remote areas of the Northern Territory.

## 5.3 Leather Manufacturing

### 5.3.1 Sector profile

Enterprises in the Leather Manufacturing sector primarily cut, tan, finish and dye leather and animal hides, skins and fur. These enterprises also produce sheepskin and slipe wool. Operators also manufacture leather or synthetic leather handbags, wallets, suitcases, saddlery and harnesses. The sector excludes leather clothing and footwear manufacturing. The key activities conducted in this industry sector are listed in Figure 5.3.1.

**Figure 5.3.1 Leather Manufacturing activities covered by ANZSIC Classification**

| ANZIC industry class | Main activities | |
|---|---|---|
| 1320 Leather Tanning, Fur Dressing and Leather Product Manufacturing | • Bag, leather or leather substitute, manufacturing<br>• Bleaching and currying fur<br>• Currying hides<br>• Embossing hides and skins<br>• Fellmongery operation<br>• Finishing hides and skins<br>• Fur rug manufacturing<br>• Fur skin dressing or dyeing<br>• Handbag manufacturing (including metal mesh handbags)<br>• Harness manufacturing<br>• Japanning hides and skins<br>• Leather or leather substitute goods manufacturing | • Leather packing, industrial, manufacturing<br>• Machine belting, leather or leather substitute, manufacturing<br>• Pelt finishing and tanning<br>• Pulling sheep and lamb skin<br>• Saddle manufacturing<br>• Scraping fur and pelt<br>• Seat cover, sheepskin, manufacturing<br>• Slipe wool manufacturing<br>• Suitcase manufacturing (including canvas)<br>• Tanning hides and skins<br>• Toy, leather, manufacturing<br>• Wallet manufacturing (including metal mesh wallets) |

*Source: Australian Bureau of Statistics, Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006 (Revision 2.0)*

There are 378 enterprises in Australia's Leather Manufacturing industry. As shown in Figure 5.3.2, most of these enterprises are in New South Wales (31.6%), Queensland (26.3%) and Victoria (23.0%). While there are a small number of large companies, such as A.I. Topper & Co, Schaffer Corporation Ltd and Teys Australia, which account for about 25% of industry revenue, the industry mainly comprises small operators[4].

**Figure 5.3.2 Location of leather production enterprises**

| State/Territory | Establishments [% of total] |
|---|---|
| NSW | 31.6 |
| QLD | 26.3 |
| VIC | 23 |
| SA | 8.6 |
| WA | 6.6 |

[4] IBIS World Manufacturing • C1320, Leather and Leather Substitute Product Manufacturing in Australia, January 2025, Page 18.

| | |
|---|---|
| TAS | 2.5 |
| ACT | 0.7 |
| NT | 0.7 |

*Source: IBISWorld 2025*

As shown in Figure 5.3.3, most businesses in Leather Manufacturing are non-employing (69.7%) or employ less than four people (19.2%).

**Figure 5.3.3 Number of Leather Manufacturing businesses, 2023**

| ANZSIC Sub-sector | Non employing | 1-4 Employees | 5-19 Employees | 20-199 Employees | 200+ Employees | Total |
|---|---|---|---|---|---|---|
| Leather Tanning, Fur Dressing and Leather Product Manufacturing | 286 | 79 | 33 | 12 | 0 | 410 |
| % of all leather manufacturing companies | 69.7% | 19.2% | 8.0% | 3% | 0% | 100% |

*Source: ABS, 2023, 8165.0 Counts of Australian Businesses, Entries and Exits, June 2019 to June 2023*

Over the last fifteen years, there has been a significant reduction in the number of enterprises in the leather production sector. In 2007-8, 633 enterprises operated at 699 locations in Australia. By 2024-5, this has declined to 378 enterprises operating at 402 locations.

There has been a corresponding drop in employment in the sector, declining from 2,512 people in 2007-8 to 1,451 in 2024-5. However, it is estimated that there has been a 1.4% growth in employment in the sector from 2020 to 2025 and it is predicted that employment may increase by 0.8% over the next five years.

As shown in Figure 5.3.4, the main products produced in the sector are:

- semi processed bovine hides
- processed bovine hides
- leather of other animal products
- other products including saddlery material, briefcases, trunks, vanity cases, satchels, wallets, purses and leather sporting goods like cricket balls and footballs.

**Figure 5.3.4 Leather Manufacturing in Australia**

| Products | Total sales [$ million AUD] | Percentage of total sales |
|---|---|---|
| Semi-processed bovine hides | 289.0 | 61.4 |

| | | |
|---|---|---|
| Processed bovine hides | 46.0 | 9.8 |
| Other products | 75.8 | 16.1 |
| Leather of other animals | 59.8 | 12.7 |

*Source: IbisWorld 2025*

### 5.3.2 Economic landscape

In 2024, the leather industry generated $470.7 million in revenue, but this has been declining at an annual rate of 1.2% over 2020-2024. Industry revenue is estimated to be relatively stagnant in the coming five years, reaching $477.5 million in 2030.

Australia is both an importer and exporter of leather products. In 2024, total imports were valued at $2.9 billion, representing a 4.2 % growth over the previous five years. Whereas, total exports were $765.0 million, representing a 3.1% decline over the same period. Overall, Australia is a net importer of leather products with a deficit of $2.1 billion.

Imports are crucial within the manufacturing supply chain as some leather imports are the same products that leather manufacturers export for additional processing. China is the industry's largest source of imports, expected to account for slightly more than one-third of industry imports in 2024-25. Most imports from China are processed Australian hides that are tanned into leather material. However, leather imports from China are declining due to quality perceptions, sustainability concerns and shifting trade dynamics. Additionally, favourable trade agreements with other countries and a focus on innovative design are reducing the demand for Chinese imports.

Exports for the industry primarily occur within the manufacturing supply chain. Animal skins and hides are exported for further processing and finished into final leather goods. As shown in Figure 5.3.5, China is the major export market, accounting for more than half of the industry's total exports. However, exports to China have declined over the past five years as China has increased its leather production capabilities, reducing its reliance on imports. Italy is another significant export market with export sales of $46.5 million, comprising 6.1% of total exports (see Figure 5.3.5). Fully integrated leather manufacturers send high-quality Australian leather to Italy and turn it into designer and premium leather goods like bags, boots and clothing imported into Australia. As shown in Figure 5.3.6, Australia imported $0.4 billion of leather products from Italy in 2023. Similarly, leather imports from France have grown to $0.3 billion. These two countries have become key sources of leather imports to Australia, reflecting growing Australian consumer demand for premium products.

**Figure 5.3.5 Major export markets for Australian leather products**

| Export market | Value [$ million] | % of total leather exports |
|---|---|---|
| China | 393.8 | 51.5 |
| New Zealand | 73.5 | 9.6 |
| Italy | 46.5 | 6.1 |
| Singapore | 41.0 | 5.4 |

| | | |
|---|---|---|
| Vietnam | 23.2 | 3.0 |

*Source: IbisWorld 2025*

**Figure 5.3.6 Major import sources of leather products to Australia**

| Export market | Value [$ billion] | % of total leather exports |
|---|---|---|
| China | 1.0 | 35.1 |
| Italy | 0.4 | 13.0 |
| France | 0.3 | 10.4 |
| India | 0.1 | 3.7 |
| Vietnam | 0.1 | 3.1 |

*Source: IbisWorld 2025*

The volume of high-quality imports from countries such as Italy and France (see Figure 5.3.6) highlight the opportunities for the Australian industry to focus on value adding through producing and marketing high-quality leather products. Australian leather manufacturers that focus on the production of premium products, respond to growing consumer demand for sustainable products, have vertically integrated operations which minimise supply side costs, secure export markets, and have contracts with upstream suppliers like cattle farms and meat processors that secure a steady supply of the inputs needed for leather production, are more likely to be successful.

The Australian leather industry faces several challenges, including pressure from imports, changes in downstream markets, a growing demand for sustainable alternatives, variable demand for premium leather products, fluctuating cattle prices, and a market structure primarily composed of small to medium-sized enterprises with limited investment capacity.

The industry is significantly affected by imports, especially from China, which has lower production costs and less stringent processing requirements. Australian producers often export raw hides to China for processing and re-import them at lower prices than locally processed products.

Furthermore, consumer preferences are changing with an increased demand for sustainable and ethically produced non-leather products. This trend is particularly strong among younger consumers, prompting manufacturers to explore sustainable alternatives. The resource-intensive nature of leather production and increasing environmental awareness are driving this move towards sustainability.

Demand from downstream markets, particularly in the clothing, footwear, and automotive sectors, is a crucial driver. As these sectors move to offshore production, domestic leather manufacturers experience reduced demand. Many have responded by focusing on high-quality, value-added leather goods.

Household discretionary income levels also impact the industry – higher disposable incomes facilitate increased spending on luxury items like leather goods. Demand for premium leather products typically rises when consumers have more disposable income, fostering industry growth. However, events such as the current cost of living crisis can dampen consumer sentiment, decreasing demand for premium leather items.

Feeder cattle prices play a vital role in the leather industry, significantly influencing raw material costs. Recent declines in cattle prices have reduced pressure on manufacturers, especially following a spike during the pandemic. However, the market remains volatile, and manufacturers must navigate unpredictable price fluctuations.

The industry mainly consists of small-scale operations with limited capital for expansion or investment. This limits opportunities for investment in new technologies and skills development.

### 5.3.3 Demographics

As noted earlier in this report, 1,451 people were employed in the leather manufacturing industry in 2024-5. This represented a slight increase over the 1,341 people employed in the industry at the ABS 2021 Census of Population and Housing.

At that time, as shown in Figures 5.3.7 and 5.3.8, women comprised 38% of the workforce, and Indigenous people formed 3% of the workforce.

**Figure 5.3.7 Leather Manufacturing - gender of workforce 2021**

| Gender | % of total workforce |
|---|---|
| Male | 62 |
| Female | 38 |

*Source: Census of Population and Housing, 2021*

**Figure 5.3.8 Leather Manufacturing - employment of First Nations people 2021**

| Indigenous / Non-Indigenous | % of total workforce |
|---|---|
| Indigenous | 3 |
| Non-Indigenous | 97 |

*Source: Census of Population and Housing, 2021*

While most people working in the industry in 2021, as shown in Figure 5.3.9, were born in Australia (76%), there was a significant number of workers who were born in Asia (9%), particularly South-East Asia (5%). There was also a notable concentration of people born in North-West (7%) and Southern and Eastern [4%] Europe.

**Figure 5.3.9 Leather Manufacturing - employment of culturally and linguistically diverse people 2021**

| Region of birth | % of workforce |
|---|---|
| Australia | 76 |
| South East Asia | 5 |
| North East Asia | 3 |
| Southern and Central Asia | 1 |
| North West Europe | 7 |
| Southern and Eastern Europe | 4 |
| Sub Saharan Africa | 2 |

| | |
|---|---|
| North Africa and the Middle East | 1 |
| Americas | 2 |

*Source: Census of Population and Housing, 2021*

Leather Manufacturing has a notable concentration of older workers, as illustrated in Figure 5.3.10. The largest portion of the workforce fell within the 50-59 age group, comprising 26% of the total workforce. This is followed by the 40-49 age group at 19%. Additionally, 18% of workers were in the 60-69 age group, while those aged 70-79 represented 5%. This suggests that many experienced workers will likely retire in the coming years. As a result, there is an urgent need for focused recruitment, training, and retention initiatives directed at younger people to ensure the industry's long-term operational stability.

Leather Manufacturing has a relatively low representation of younger workers. The 20-29 age group accounts for only 11% of the workforce, and the 15-19 age group comprises just 4%. The limited entry of younger workers into the industry may be attributed to a poor perception of the industry among young people, the availability of relevant training and education programs, and the lack of career pathways. If this trend continues, the industry may experience ongoing skilled shortages, a situation that the retirement of older workers could exacerbate.

**Figure 5.3.10 Leather Manufacturing - age distribution of workforce 2021**

| Age Structure | % of workforce |
|---|---|
| 15-19 years | 4 |
| 20-29 years | 11 |
| 30-39 years | 17 |
| 40-49 years | 19 |
| 50-59 years | 26 |
| 60-69 years | 18 |
| 70-79 years | 5 |

*Source: Census of Population and Housing, 2021*

As shown in Figure 5.3.11, almost half of the people working in Leather Manufacturing have secondary education as their highest level of education. This includes 6% who have completed Year 9 and below and 42% who have completed Year 10 and above. About 25% of workers hold a Certificate III or IV. Diploma and Advanced Diploma holders constitute 11% of the workforce. Workers with higher education qualifications, including bachelor's degrees, graduate diplomas, and graduate certificates, make up 17% of the workforce.

**Figure 5.3.11 Leather Manufacturing - education level of workforce 2021**

| Level of education | % of workforce |
|---|---|
| Secondary education – Year 9 and below | 6 |
| Secondary education – Year 10 and above | 42 |
| Certificate III and IV | 25 |

| | |
|---|---|
| Advanced Diploma and Diploma | 11 |
| Bachelor's Degree | 13 |
| Graduate Diploma and Graduate Certificate | 1 |
| Postgraduate degree | 3 |

*Source: Census of Population and Housing, 2021*

### 5.3.4 New technologies and materials

Processors and manufacturers of leather goods are adopting new technologies and materials to reduce operating costs, meet environmental requirements, respond to consumer demand for more sustainable products and boost productivity.

Key innovations in the industry include:

- sustainable tanning – new tanning technologies are being adopted to minimise water usage, reduce chemical waste, and promote environmentally friendly leather production. This includes using chrome and pickle recycling, applying hair and fat saving technologies, reusing treated wastewater, and banning the use of hazardous chemicals especially those on the Zero Discharge of Hazardous Chemicals Manufacturing Restricted Substances List.
- precision cutting – the use of laser cutting machines that allow for intricate designs and precise cuts on leather, minimising waste and enabling complex shapes.
- automated pattern cutting – the use of computer-aided pattern cutting systems to optimise leather usage by automatically creating patterns and cutting hides with high accuracy.
- high-speed stitching – the use of automated sewing machines with high-speed capabilities to enable faster production of leather goods.
- improved product traceability and environmental monitoring – the use of industry approved traceability systems to track a product's journey through the supply chain while simultaneously monitoring the environmental impact at each stage, allowing for better quality control, sustainability practices, and identification of potential environmental concerns throughout the production process.
- 3D printing – the use of 3D printing for prototyping and creating custom designs on leather goods, allowing designers to rapidly produce physical models of handbags, and other accessories before committing to full production with real leather, thereby reducing waste and time to market.
- new materials – the use of new materials, primarily plant-based materials, such as pineapple leather (Piñatex), cactus leather (Desserto), and other vegan leather alternatives, to reduce the industry's environmental impact.
- Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) systems – the use of ERP systems for managing production planning, inventory control, supply chain management, and financials and CRM systems for managing customer interactions, sales pipelines, and order tracking streamline operations and optimise business processes within leather manufacturing companies.

These innovations will require skills upgrading for existing workers and push demand for new skills in the leather industry in occupational areas such as environmental auditors, 3D printing technicians, mechatronics technicians, materials technologists, ERP and CRM specialists and computer software programmers.

### 5.3.5 Occupations

In 2021, out of the 1,341 people employed in the leather manufacturing industry, 415 held positions specifically related to leather product manufacturing. The remaining people worked in support roles, which include administration, planning, human resources and management positions. This pattern aligns with the broader TCF industry, where it is estimated that approximately 40% of the workforce is engaged in jobs specific to TCF production, while the remaining 60% work in essential support functions, many of which are common across various industries. Figure 5.3.12, provides a list of key leather production roles and their alignment with the Australian Qualifications Framework.

**Figure 5.3.12 Leather and leather substitute product manufacturing - occupations and specialisations in the TCF industry**

| AQF Level | Leather Manufacturing |
|---|---|
| 2 | Production Assistant |
| 3 | Machine/Production Operator<br>Fellmongering Machine Operator<br>Hide and Skin Fleshing Machine Operator<br>Hide and Skin Processing Machine Operator<br>Sammying Machine Operator<br>Tanner<br>Leather Goods Machinist<br>Leather Sewers<br>Pattern Makers<br>Cutters |
| 4 | Leather Goods Grader<br>Saddler<br>Harness Maker<br>Whip Maker<br>Leading Hand |
| 5 | |
| 6 | Leather Goods Designer<br>Production Manager |

Figure 5.3.13 shows employment in specialised leather production roles according to the ANZSCO classification of occupations.

**Figure 5.3.13 Leather and leather substitute product manufacturing - employment in specialised occupations (ANZSCO 4 and 6-digit level) by sector, 2021**

| Occupations (ANZSCO 4 and 6-digit) | | Number of employees |
|---|---|---|
| 3931 Canvas and Leather Goods Makers | 393112 Leather Goods Maker | 268 |
| | 393114 Shoemaker | 3 |
| | 393213 Dressmaker or Tailor | 13 |
| | 393299 Clothing Trades Workers nec | 4 |
| 7117 Textile and Footwear Production Machine Operators | 711711 Footwear Production Machine Operator | 3 |
| | 711712 Hide and Skin Processing Machine Operator | 80 |
| | 711611 Sewing Machinist | 33 |
| 2323 Fashion, Industrial and Jewellery Designers | 232311 Fashion Designer | 3 |
| | 232312 Industrial Designer | 8 |
| Total | | 415 |

This indicates that the industry's two largest specialist occupational groups in 2021 were Leather Goods Makers and Hide and Skin Processing Machine Operators. Compared with all occupations in the Australian workforce (see Figure 5.3.14), workers in these two occupations tend to be older, have lower educational attainment, are more likely to be male, work longer hours and be employed full-time.

**Figure 5.3.14 Leather and leather substitute product manufacturing - key employment-related characteristics of major specialist occupational groups**

| Characteristics | All Occupations in Australian Workforce | Hide and Skin Processing Machine Operators | Leather Goods Makers |
|---|---|---|---|
| Highest level of educational attainment – Year 12 and below | 26.0% | 58.1% | 48.4% |
| Median age | 40 years | 44 years | 50 years |
| Female share of employment | 49% | 19% | 7% |
| Share of workers who work full-time hours | 64% | 83% | 92% |
| Average full-time hours worked per week | 35 hours | 44 hours | 45 hours |
| % of workforce aged 45 years and older | 40.6% | 45.2% | 63.7% |

*Source: Jobs and Skills Australia based on ABS, 2021 Census of Population and Housing*

### 5.3.6 Skill needs

In its latest industry report, IBISWorld noted that employment grew at an annual rate of 1.4% in the period 2024-25 and is predicted to grow by 0.9% between 2025-30 by 0.9%. While this growth is moderate, when this is coupled with an ageing workforce, skill shortages will likely be an ongoing challenge for the industry. Discussions with industry representatives for this project indicated that there are current shortages of:

- leather craftspeople
- harness makers
- leather sewers
- leather machinists
- pattern makers
- cutters.

The use of new technologies and materials along with increasing environmental regulation will drive demand for new skills in the leather industry including environmental auditors, 3D printing technicians, mechatronics technicians, materials technologists, ERP and CRM specialists and computer software programmers.

### 5.3.7 MST Training Package qualifications

As illustrated in Figure 5.3.15, the current version of the *MST Textiles, Clothing and Footwear Training Package* [MST30519] includes a leather production pathway.

**Figure 5.3.15 Leather production qualification pathway**


The *MST20319 Certificate II in Leather Production* is an entry-level qualification for those involved in hide, skin and leather processing and producing leather goods. The *MST30519 Certificate III in Leather Production* provides the skills and knowledge required to perform supervision, specialised, or multi-skilled roles within a leather production environment. The work relates to specialised technical, operational and supervisory roles in a hide, skin and leather processing enterprise or an enterprise involved in the production of leather goods.

#### 5.3.7.1 Registered training organisations offering training package qualifications

As indicated in Figure 5.3.16, three registered training organisations offer the *MST20319 Certificate II in Leather Production* – all based in Queensland. Two registered training organisations offer the *MST30519 Certificate III in Leather Production*.

**Figure 5.3.16 Registered training organisations – qualifications on scope of registration**

| MST20319 Certificate II in Leather Production | | MST30519 Certificate III in Leather Production | |
|---|---|---|---|
| **RTO** | **Jurisdiction** | **RTO** | **Jurisdiction** |
| Tactile Training Pty Ltd | QLD | Tactile Training Pty Ltd | QLD |
| TAFE Queensland | QLD | TAFE SA | SA |
| Learnivation | QLD | | |

*Source: training.gov.au Feb 2025*

### 5.3.7.2 Enrolment and completion of training package qualifications

Enrolments in the *MST20319 Certificate II in Leather Production* and the former *MST20316 Certificate II in Leather Production* have risen steadily from 10 students in 2019 to 115 in 2022 – see Figure 5.3.17. While it is difficult to compare the enrolment and completion data during this period directly, most students who enrolled in the qualification appear to have completed the program. Figure 5.3.18 shows that the number of completions has risen broadly in line with the number of enrolments. The qualification produces a steady stream of graduates with fundamental leather work skills.

Enrolments in the *MST30519 Certificate III in Leather Production* and the former *MST30516 Certificate III Leather Production*, which is delivered through apprenticeship arrangements, were steady during 2019 – 2023. While there were consistent enrolments, only 15 apprentices completed the program between 2019 and 2023.

**Figure 5.3.17 Enrolments and completions in leather production qualifications 2019-2023 – number of students**

| Qualification | Gender | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| MST20319 Certificate II in Leather Production | Male | 5 | 20 | 45 | 45 | 25 |
| | Female | 5 | 20 | 50 | 70 | 50 |
| | Apprenticeship / traineeship | - | - | - | - | - |
| | **Total** | **10** | **40** | **95** | **115** | **75** |
| MST30519 Certificate III in Leather Production | Male | 10 | 15 | 10 | 10 | 10 |
| | Female | 5 | 5 | 5 | 5 | 10 |
| | Apprenticeship / traineeship | 15 | 20 | 15 | 15 | 20 |
| | **Total** | **10** | **20** | **15** | **15** | **20** |

*Note: 2019-2020 figures are based on enrolments in MST20316 Certificate II in Leather Production and MST30516 Certificate III Leather Production, which were superseded by the current qualifications.*

*Source NCVER 2025*

**Figure 5.3.18 Completion of leather production qualifications 2019-2023 – number of graduates**

| Qualification | Gender | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| MST20319 Certificate II in Leather Production | Male | 10 | 20 | 35 | 35 | 20 |
| | Female | *5* | *15* | 20 | 45 | 30 |
| | **Total** | **15** | **35** | **55** | **80** | **50** |
| MST40316 Certificate IV in Custom-Made Footwear | Male | *5* | *5* | - | *5* | - |
| | Female | - | - | - | - | - |
| | Apprenticeship / traineeship | *5* | *5* | - | *5* | - |
| | **Total** | **5** | **5** | **-** | **5** | **-** |

*Note: 2019-2020 figures are based on completions in MST20316 Certificate II in Leather Production and MST30516 Certificate III Leather Production, which were superseded by the current qualifications.*

*Source NCVER 2025*

#### 5.3.7.3 Observations on the uptake of nationally recognised qualifications in the leather production sector

There is limited uptake of the qualifications in the *MST Textiles, Clothing and Footwear Training Package* [MST30519] in the leather production sector.

However, it is noticeable that enrolments in *MST20319 Certificate II in Leather Production* increased from 10 in 2019 to *75* in 2023, and enrolments in the industry's main apprenticeship program, *MST30519 Certificate III in Leather Production*, remained in the range of 15-20 apprentices per year.

In addition, completion rates for the *MST20319 Certificate II in Leather Production* were relatively high with 50 individuals graduating from the qualification in 2023 (20 males/ 30 females). However, no one completed the *MST30519 Certificate III in Leather Production* in 2019-23.

There is limited provision of these qualifications. Three RTOs offer the Certificate II qualification and two offer the Certificate III program. Three RTOs offering leather production qualifications are based in Queensland, with the other provider being in South Australia.

There is significant potential to expand the provision of Recognition of Prior Learning in the leather production sector. 48% of employees in the sector have a secondary school education as their highest qualification, with approximately 6% only having completed Year 9.

## 5.4 Footwear Manufacturing

### 5.4.1 Sector profile

In Footwear Manufacturing, enterprises produce all kinds of shoes, including footwear with leather uppers, specialised footwear and footwear with plastic or rubber uppers. The key activities conducted in this sector are listed in Figure 5.4.1.

**Figure 5.4.1 Footwear Manufacturing activities covered by ANZSIC Classification**

| ANZIC industry class | Main activities | |
|---|---|---|
| 1352 Footwear Manufacturing | • Boot manufacturing<br>• Footwear component manufacturing<br>• Footwear manufacturing (including safety or protective footwear) | • Orthopaedic shoe manufacturing (excluding orthopaedic extension footwear) Sandal manufacturing<br>• Shoe manufacturing<br>• Slipper manufacturing |

*Source: Australian Bureau of Statistics, Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006 (Revision 2.0)*

Australia's Footwear Manufacturing sector comprises 137[5] enterprises, primarily concentrated in Victoria and New South Wales - see Figure 5.4.2. More than 60% of manufacturers are in these two states, which have a strong history in apparel and footwear production. This long-standing tradition has created an attractive environment for manufacturers, contributing to their concentration in the region. In contrast, the Northern Territory, Tasmania, and the Australian Capital Territory have minimal activity in the footwear sector.

**Figure 5.4.2 Location of Footwear Manufacturing enterprises**

| State/Territory | Establishments [% of total] |
|---|---|
| NSW | 32.9 |
| QLD | 13.9 |
| VIC | 34.2 |
| SA | 11.4 |
| WA | 5.7 |
| TAS | 1.9 |
| ACT | 0.0 |
| NT | 0.0 |

*Source: IBISWorld 2025*

As shown in Figure 5.4.3, in 2023, most Footwear Manufacturing businesses are non-employing (53.7%) or employ less than four people (27.7%).

[5] Source: IBISWorld data on total number of establishments in 2024-25

**Figure 5.4.3 Number of Footwear Manufacturing businesses, 2023**

| ANZSIC Sub-sector | Non employing | 1-4 Employees | 5-19 Employees | 20-199 Employees | 200+ Employees | Total |
|---|---|---|---|---|---|---|
| Leather Tanning, Fur Dressing and Leather Product Manufacturing | 87 | 45 | 22 | 7 | 3 | 162 |
| % of all Leather Manufacturing companies | 53.7% | 27.7% | 13.5% | 4.3% | 1.8% | 100% |

*Source: ABS, 2023, 8165.0 Counts of Australian Businesses, Entries and Exits, June 2019 to June 2023*

The top two manufacturers, R.M. Williams (27.2%) and Blundstone (5.0%) accounted for less than 40% of total industry revenue in 2025, indicating a fragmented market where only some manufacturers hold substantial market power. As indicated in Figure 5.4.3, over half the businesses operate without employees, operating as sole proprietorships and small-scale manufacturers. Over 40% of the industry's employing enterprises have fewer than 20 employees, reflecting the widespread presence of small-scale operations and a limited workforce.

Over the last fifteen years, there has been a significant reduction in the number of footwear manufacturing businesses. In 2007-8, 282 enterprises operated at 360 locations in Australia. By 2024-5, this has declined to 137 enterprises operating at 187 locations.

There has been a corresponding drop in employment in the sector, declining from 2,297 people in 2007-8 to 1,653 in 2024-5. It is estimated that employment in the sector declined 1.3% per year in the period 2000 to 2005 and it is predicted that employment may increase by only 0.3% over the next five years.

As shown in Figure 5.4.4, the main products produced in the sector are:

- footwear with leather uppers
- specialised footwear
- footwear with plastic or rubber uppers and other products.

**Figure 5.4.4 Footwear Manufacturing in Australia**

| Products | Total sales [$ million AUD] | Percentage of total sales |
|---|---|---|
| Footwear with leather uppers | 329.9 | 49.5 |
| Specialised footwear | 176.6 | 26.5 |
| Footwear with plastic or rubber uppers and other products | 160.0 | 24.0 |

*Source: IbisWorld 2025*

### 5.4.2 Economic landscape

In 2024, the industry generated $666.5 million in revenue, but this has been declining at an annual rate of 4.9% from 2020 to 2024. Industry revenue is estimated to decline by 1.1% in 2025 and remain relatively stagnant in the coming five years, reaching $707.8 million in 2030.

The industry's contribution to the overall economy is declining despite broader economic growth. Over the past five years, the rise in imports, has decreased domestic manufacturers' market share and revenue. While there has been an overall decline in industry revenue this is not evenly spread across the footwear manufacturing industry. The latest IBISWorld report notes that '… the footwear industry is experiencing shifts in consumer preferences and market dynamics, leading to changes in revenue and market share for different segments.

'Leather footwear with traditional styling is facing declining demand, while specialised footwear and plastic/rubber uppers are seeing growth due to factors like increased construction activity and consumer demand for durable options. The segment of footwear with leather uppers, traditionally the largest in the industry, is witnessing revenue declines as consumers move away from traditional leather products. This shift, coupled with dwindling department store sales, is contributing to the overall decline in demand. However, RM Williams stands out with strong branding and high demand for its premium leather boots, driving growth despite the broader decline. Additionally, competition from synthetic and lower-cost imported footwear is eating into the market share of many leather footwear producers, while rising prices for leather footwear are deterring budget-conscious consumers.

'Manufacturers are increasingly focusing on high-value, specialised footwear like steel-capped boots to combat competition from cheaper imports. Some companies have shifted production to countries like Vietnam to enhance profit margins and global competitiveness. Despite challenges, the specialised footwear sector is gaining revenue share, driven by consistent demand for high-quality work boots in various industries.

'The construction sector, a significant consumer of specialised footwear, is experiencing increased demand due to a resurgence in building activity and improved supply chains, contributing to growth in the specialised footwear segment. The segment of footwear with plastic or rubber uppers, including waterproof shoes and thongs, has expanded to meet consumer demand for versatile, durable options. Components like plastic heels and buckles are often sourced from countries like China. Despite facing competition from low-cost imports, the segment is sustaining revenue growth through strategic positioning and differentiation. For instance, aqua shoes are maintaining strong sales with their high-quality waterproof designs. New free-trade agreements have also opened additional markets, contributing to revenue growth despite competitive pressures. Overall, the strong demand for versatile, affordable, and durable footwear choices is fuelling growth in this segment.'

Australian footwear manufacturers have adopted a range of strategies to remain competitive, including focusing on premium and niche footwear, investing in automation to reduce reliance on manual labour, adopting advanced manufacturing technologies, improving supply chain management, creating e-commerce platforms and meeting consumer demand for more sustainable products and production processes.

The Australian footwear manufacturing industry is a net importer, with total imports of $3.4 billion and total exports of $150.3 million. In 2020-25, imports grew at an annual rate of 2.7% while exports declined by 1.7%. Imports are expected to meet more than 85% of domestic demand,

putting pressure on local manufacturers. Offshore producers benefit from lower input costs, supply chain efficiencies and economies of scale, allowing them to offer more competitive pricing.

Figure 5.4.5 indicates that China is the largest source of footwear imports, benefiting from its low production costs and efficient supply chain. Meanwhile, Vietnam is gaining traction in the Australian market due to its competitive pricing. Additionally, there is a continued demand for Italian footwear, primarily driven by consumer interest in high-quality leather footwear products.

**Figure 5.4.5. Australia - major source of footwear imports**

| Export market | Value [$ billion] | % of total footwear exports |
|---|---|---|
| China | 1.4 | 51.5 |
| Vietnam | 0.9 | 25.2 |
| Indonesia | 0.3 | 9.9 |
| Italy | 0.2 | 6.8 |
| Germany | 0.1 | 1.7 |

*Source: IbisWorld 2025*

Although exports of Australian-manufactured footwear have declined over the past five years, it is estimated that they will account for over 20% of industry revenue in 2024-25. These exports are driven more by quality than by price. As shown in Figure 5.4.6, New Zealand continues to be Australia's primary export market. However, Singapore, the United Kingdom, the Netherlands, and the Pacific Island nations are significant markets for Australian footwear exporters.

**Figure 5.4.6. Australia - major export markets for footwear**

| Export market | Value [$ million] | % of total footwear exports |
|---|---|---|
| New Zealand | 34.1 | 22.7 |
| Singapore | 10.6 | 7.1 |
| United Kingdom | 7.4 | 4.9 |
| The Netherlands | 6.5 | 4.3 |
| PNG | 6.0 | 4.0 |
| Fiji | 4.6 | 3.1 |

*Source: IbisWorld 2025*

### 5.4.3 Demographics

As noted earlier in this report, 1,653 people were employed in the footwear manufacturing industry in 2024-5. This is a slight decrease over the 1,804 people employed in the industry at time of the ABS 2021 Census of Population and Housing.

At that time, as shown in Figures 5.4.7 and 5.4.8, women comprised 52% of the workforce, and Indigenous people formed 1% of the workforce.

**Figure 5.4.7 Footwear Manufacturing - gender of workforce 2021**

| Gender | % of total workforce |
|---|---|
| Male | 48 |
| Female | 52 |

*Source: Census of Population and Housing, 2021*

**Figure 5.4.8 Footwear Manufacturing - employment of First Nations people 2021**

| Indigenous / Non-indigenous | % of total workforce |
|---|---|
| Indigenous | 1 |
| Non-Indigenous | 99 |

*Source: Census of Population and Housing, 2021*

While most people working in the industry in 2021, as shown in Figure 5.4.9, were born in Australia [61%], there was a significant number of workers who were born in Asia [21%], particularly South-East Asia [15%]. There was also a notable concentration of people born in North-West [7%] and Southern and Eastern [3%] Europe.

**Figure 5.4.9 Footwear Manufacturing - employment of culturally and linguistically diverse people 2021**

| Region of birth | % of workforce |
|---|---|
| Australia | 61 |
| South-East Asia | 15 |
| North-East Asia | 4 |
| Southern and Central Asia | 2 |
| North-West Europe | 7 |
| Southern and Eastern Europe | 3 |
| Sub Saharan Africa | 2 |
| North Africa and the Middle East | 3 |
| Americas | 3 |

*Source: Census of Population and Housing, 2021*

There is a notable concentration of older workers in the footwear manufacturing industry. As shown in Figure 5.4.10, the most significant portion of the workforce fell within the 50-59 age group, comprising 25% of the total workforce. Overall, 60% of workers in the industry are aged over 40. This suggests that many experienced workers will retire shortly. As a result, there is an urgent need for focused recruitment, training, and retention initiatives directed at younger people to ensure the industry's long-term operational stability.

The Footwear Manufacturing industry has a relatively low representation of younger workers. The 20-29 age group accounts for only 18% of the workforce, and the 15-19 age group comprises

just 1%. The low number of younger workers is attributable to the industry's limited appeal to young workers, inadequate efforts to recruit and retain young people, the availability of relevant training and education programs, and the perceived lack of career prospects within the sector. If this trend persists, the industry is likely to face ongoing skill shortages, which are exacerbated by the retirement of older workers.

**Figure 5.4.10. Footwear Manufacturing - age distribution of workforce 2021**

| Age Structure | % of workforce |
|---|---|
| 15-19 years | 1 |
| 20-29 years | 18 |
| 30-39 years | 20 |
| 40-49 years | 18 |
| 50-59 years | 25 |
| 60-69 years | 15 |
| 70-79 years | 2 |

*Source: Census of Population and Housing, 2021*

As shown in Figure 5.4.11, just over half of the people working in the Footwear Manufacturing industry have a secondary education as their highest level of education. This includes 7% who have completed Year 9 and below and 48% who have completed Year 10 and above. About 18% of workers hold a Certificate III or IV. Diploma and Advanced Diploma holders constitute 9% of the workforce. Workers with higher education qualifications, including bachelor's degrees, graduate diplomas, and graduate certificates, make up 17% of the workforce.

**Figure 5.4.11 Footwear Manufacturing - education level of workforce 2021**

| Level of education | % of workforce |
|---|---|
| Secondary education – Year 9 and below | 7 |
| Secondary education – Year 10 and above | 48 |
| Certificate III and IV | 18 |
| Advanced Diploma and Diploma | 9 |
| Bachelor's degree | 14 |
| Graduate Diploma and Graduate Certificate | 1 |
| Postgraduate degree | 2 |

*Source: Census of Population and Housing, 2021*

### 5.4.4 New technologies and materials

Both large and smaller scale manufacturers are embracing new technologies and materials to boost product quality, respond to the need for more sustainable products, address skill shortages and remain competitive.

Manufacturers, such as Steel Blue and R.M. Williams, use high-performance synthetic and eco-friendly materials to enhance product durability and sustainability. Some companies are utilising

3D-printing technology to facilitate rapid prototyping and customisation. Others have implemented ERP and CRM systems to manage their finance, HR, manufacturing, supply chain, sales, and procurement functions and automated logistics systems to improve the efficiency of their warehousing and distribution centre operations. By adopting automation in production lines, including robotics, manufacturers can enhance precision and efficiency to meet higher quality standards and reduce production costs.

Sustainable practices are fuelling product innovation. Manufacturers increasingly use recycled and sustainable materials, like recycled plastics and organic cotton, to address environmental concerns and appeal to eco-conscious consumers. Switching to water-based adhesives reduces harmful chemicals, making manufacturing more environmentally friendly. Companies like Etiko are adopting circular economy practices, including product take-back schemes and recycling programs, to minimise waste and extend product lifecycles.

These changes are increasing the demand for skilled labour and changing the occupational profile of the industry. Over time, it is expected that there will be a demand for new skill sets in occupational areas such as mechatronics technicians, 3D printing technicians, materials technologists and computer software programmers.

### 5.4.5 Occupations

In 2021, out of the 1,804 people employed in the footwear manufacturing industry, 359 held positions related explicitly to footwear production. The remaining people worked in support roles, which include administration, procurement, human resources, logistics and management positions. This pattern aligns with the broader TCF industry, where it is estimated that approximately 40% of the workforce is engaged in jobs specific to TCF production, while the remaining 60% work in essential support functions, many of which are common across various industries.

Figure 5.4.12 illustrates the various types of specialist footwear production roles and their alignment with the Australian Qualifications Framework.

**Figure 5.4.12. Footwear Manufacturing - occupations and specialisations in the TCF industry**

| AQF Level | Footwear Manufacturing |
|---|---|
| 2 | Production Assistant |
| 3 | Machine/Production Operator:<br>• Footwear Cutter<br>• Footwear Finisher<br>• Footwear stitcher<br>• Footwear assembler |
| 4 | Custom-made Footwear Maker<br>Medical Grade Footwear Maker<br>Pattern Maker & Grader (Footwear)<br>Footwear Repairer<br>Leading Hand |
| 5 | Footwear Technologist |
| 6 | Footwear Designer<br>Production Manager |

Figure 5.4.13 shows employment in specialised footwear production roles according to the ANZSCO classification of occupations.

**Figure 5.4.13. Footwear Manufacturing - employment in specialised occupations (ANZSCO 4 and 6-digit level) by sector, 2021**

| Occupations (ANZSCO 4 and 6-digit) | | Number of employees |
|---|---|---|
| 3931 Canvas and Leather Goods Makers | 393112 Leather Goods Maker | 7 |
| | 393114 Shoemaker | 164 |
| | 393213 Dressmaker or Tailor | 13 |
| 7117 Textile and Footwear Production Machine Operators | 711711 Footwear Production Machine Operator | 101 |
| | 711712 Hide and Skin Processing Machine Operator | 3 |
| | 711799 Textile and Footwear Production Machine Operators nfd | 10 |
| | 711611 Sewing Machinist | 27 |
| 2323 Fashion, Industrial and Jewellery Designers | 232311 Fashion Designer | 30 |
| | 232312 Industrial Designer | 4 |
| Total | | 359 |

The industry's two largest specialist occupations in 2021 were Shoemakers and Footwear Production Machine Operators. Compared with all occupations in the Australian workforce (see Figure 5.4.14), workers in these two occupations tend to be older, have lower educational attainment, and are more likely to be employed full-time. Interestingly, there is a clear gender divide between these two critical occupations with shoemakers more likely to be male and footwear production machine operators more likely to be female. It is also notable that footwear production machine operators tend to be older, with 72.2% of the workforce being aged 45 years and older.

**Figure 5.4.14. Footwear Manufacturing – key employment-related characteristics of major specialist occupational groups**

| Characteristics | All Occupations in Australian Workforce | Shoemakers | Footwear Production Machine Operators |
|---|---|---|---|
| Highest level of educational attainment – Year 12 and below | 26.0% | 50.5% | 73.5% |
| Median age | 40 years | 51 years | 52 years |
| Female share of employment | 49% | 15% | 71% |

| | | | |
|---|---|---|---|
| Share of workers who work full-time hours | 64% | 67% | 67% |
| Average full-time hours worked per week | 35 hours | 42 hours | 38 hours |
| % of workforce aged 45 years and older | 40.6% | 61.8% | 72.2% |

*Source: Jobs and Skills Australia based on ABS, 2021 Census of Population and Housing*

### 5.4.6 Skill needs

In its latest industry report, IBISWorld noted that there will be limited employment growth in the footwear manufacturing sector. However, the report highlighted that, the adoption of automation, the increasing use of advanced manufacturing technologies, the focus on niche and premium footwear products and the use of sustainable and environmentally friendly materials is driving demand for new skills such as:

- materials technologists
- fashion designers
- mechatronics technicians
- 3D printing technicians
- process improvement specialists
- procurement specialists.

In addition, the ongoing demand for production workers who perform cutting, shaping, sewing, glueing, pattern making and fabrication tasks is exacerbated by an ageing workforce.

Of particular concern is the critical shortage of footwear machine mechanics. These skilled tradespeople are responsible for commissioning, maintaining, and repairing the machinery used in footwear production. Many of these highly skilled workers are nearing retirement age, with many planning to retire within the next five years. This issue is exacerbated by the difficulty in attracting younger workers to the occupation and the increasing skill requirements that come with the adoption of advanced manufacturing technologies.

### 5.4.7 MST Training Package qualifications and skill sets

As illustrated in Figure 5.4.15, the current version of the *MST Textiles, Clothing and Footwear Training Package* [MST30519] includes a footwear production pathway.

**Figure 5.4.15. Footwear Manufacturing qualification pathway**


The *MST20722 Certificate II in Apparel, Fashion and Textiles* is a broad-based qualification for entry-level textile, clothing and footwear workers. Individuals undertaking this program who complete at least four footwear-production-related electives are awarded the *MST20722 Certificate II in Apparel, Fashion and Textiles (Footwear)*. The *MST30416 Certificate III in Footwear* is intended for those who produce or repair footwear and require an in-depth knowledge of footwear materials and production or repair processes. The *MST40316 Certificate IV in Custom-Made Footwear* provides the skills and knowledge to design and produce custom-made footwear or footwear that involves small production quantities. Those wishing to pursue quality and business management roles in the footwear sector may undertake the *MST50122 Diploma of Apparel, Fashion and Textiles*. While this latter qualification does not include a footwear specialisation, it includes several footwear-related electives and a broad range of business management electives.

#### 5.4.7.1 Registered training organisations offering training package qualifications

The two main qualifications for delivering footwear production skills are the *MST30416 Certificate III in Footwear* and the *MST40316 Certificate IV in Custom-Made Footwear*.

As indicated in Figure 5.4.16, only one registered training organisation offers the *MST30416 Certificate III in Footwear*, and three provide the *MST40316 Certificate IV in Custom-Made Footwear*. Interestingly, no NSW-based RTO provides training to the industry, even though 32.9% of employees are found in NSW.

**Figure 5.4.16 Registered training organisations – Footwear Manufacturing qualifications on scope of registration**

| MST30416 Certificate III in Footwear | | MST40316 Certificate IV in Custom-Made Footwear | |
|---|---|---|---|
| **RTO** | **Jurisdiction** | **RTO** | **Jurisdiction** |
| Tactile Training Pty Ltd | QLD | Tactile Training Pty Ltd | QLD |
| | | RMIT | VIC |
| | | TAFE SA | SA |

*Source: training.gov.au Feb 2025*

### 5.4.7.2 Enrolment and completion of training package qualifications

Enrolments in the *MST30416 Certificate III in Footwear* and the *MST40316 Certificate IV in Custom-Made Footwear* have been low for a significant period. As illustrated in Figure 5.4.17, the NCVER reported that there were no enrolments in the *MST30416 Certificate III in Footwear*, the main apprenticeship qualification for footwear production, in the period 2019-2022 and only five enrolments in 2022 – all of which were at the sole Queensland-based provider of this qualification. During this period, no one completed the qualification – see Figure 5.4.18.

**Figure 5.4.17 Enrolments in Footwear Manufacturing qualifications 2019-2023 – number of students**

| Qualification | Gender | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| MST30416 Certificate III in Footwear | Male | - | - | - | - | *5* |
| | Female | - | - | - | - | - |
| | Apprenticeship / traineeship | - | - | - | - | *5* |
| | **Total** | **-** | **-** | **-** | **-** | **5** |
| MST40316 Certificate IV in Custom-Made Footwear | Male | 10 | 10 | 10 | - | 15 |
| | Female | *5* | *5* | 10 | *5* | 15 |
| | Apprenticeship / traineeship | | - | - | - | - |
| | **Total** | **15** | **15** | **20** | **5** | **30** |

Similarly, between 2019 and 2023, only 85 people enrolled in the *MST40316 Certificate IV in Custom-Made Footwear*. In total, 35 people graduated from this program during this period, including 15 males and 20 females (see Figure 5.4.17).

**Figure 5.4.18 Completion of Footwear Manufacturing qualifications 2019-2023 – number of graduates**

| Qualification | Gender | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| MST30416 Certificate III in Footwear | Male | - | - | - | - | - |
| | Female | - | - | - | - | - |
| | Total | - | - | - | - | - |

| | | | | | | |
|---|---|---|---|---|---|---|
| MST40316 Certificate IV in Custom-Made Footwear | Male | *5* | - | *5* | - | *5* |
| | Female | *5* | - | *5* | *5* | *5* |
| | Total | 10 | - | 10 | *5* | 10 |

#### 5.4.7.3 Observations on the uptake of nationally recognised qualifications in the footwear production sector

There is very limited uptake of the qualifications in the *MST Textiles, Clothing and Footwear Training Package* [MST30519] in the footwear production sector, with most employees acquiring their skills through informal, on-the-job and non-accredited learning.

Enrolments in nationally recognised qualifications in this sector are very low, with only 35 students enrolling in the following qualifications in 2023:

- MST30416 Certificate III in Footwear (*5* enrolments),
- MST40316 Certificate IV in Custom-Made Footwear (30 enrolments).

Completion rates in these qualifications are also low. In 2023, only 10 individuals in total completed the following qualifications:

- MST30416 Certificate III in Footwear (0 completions),
- MST40316 Certificate IV in Custom-Made Footwear (10 completions)

There is limited provision of these qualifications. Three RTOs offer the Certificate IV qualification and only one Queensland-based RTO provides *MST30416 Certificate III in Footwear*.

There is significant potential to expand the provision of Recognition of Prior Learning in the footwear production sector. Over half of the employees in the sector (55%) have a secondary school education as their highest qualification, with approximately 7% only having completed Year 9.

There is a critical shortage of footwear production apprentices. Only five apprentices enrolled in the Certificate III in Footwear from 2019 to 2023. There were no graduates from the qualification and the five apprentices were all male. Additionally, the apprenticeship program is only offered by one Queensland-based RTO.

## Case study R.M. Williams

*The following case study presents one of Australia's most iconic niche leather and apparel brands, R.M. Williams. It highlights the workforce challenges faced by onshore manufacturers.*

Founded 92 years ago, R.M. Williams has an iconic mission: to create products that can withstand the harsh conditions of the Australian outback and are designed for repeated repair. This commitment to sustainability has been central to the business since its inception. In 2020, the sustainability mission gained momentum when Andrew and Nicola Forrest acquired R.M. Williams through their investment company, Tattarang.

The company promotes the Certificate III in Leather Production as an essential qualification for leather craftsmen and craftswomen, supporting the growth of workshop and training

opportunities. R.M. Williams is dedicated to providing quality, Australian-made boots, accessories, and durable apparel, with its base in Adelaide.

R.M. Williams emphasises skills and workforce development, with a core value of providing communities with a more sustainable and circular future. Offering apprenticeships in leather and footwear is a key strategy, as these skills are essential for the company's scope of work.

R.M. Williams does not believe that a generic Certificate III apprenticeship adequately develops the skills and knowledge needed for its leather workforce, which is why it specialises in leather and craft production. Other apprenticeships are also necessary, such as those in laundry, where a high level of knowledge and skills is required in working with chemicals and cleaning processes. This is particularly important since R.M. Williams has a large laundry section where all apparel products are laundered as part of the final production process.

A notable difference between R.M. Williams and other textile, clothing, and footwear organisations is that they do not experience labour shortages when recruiting production staff. They receive more applications than there are available positions, mainly because Australian workers want to be part of this iconic brand and contribute to the footwear and leather production industry.

However, like other TCF companies, R.M. Williams faces skills shortages in specialised roles such as technicians, machine mechanics, pattern makers, process improvement specialists, and procurement experts. These positions require several years of training to acquire the necessary skills.

## 5.5 Dry Cleaning and Laundry Services

### 5.5.1 Sector profile

Dry cleaning services clean clothes using non-aqueous organic solvents, without water use, during inspection, spotting, and finishing processes. In contrast, laundry services wash, dry, starch, and iron clothes for clients. The key activities conducted in this sector are listed in Figure 5.5.1.

**Figure 5.5.1 Dry cleaning and laundry activities covered by ANZSIC Classification**

| ANZIC industry class | Main activities | |
|---|---|---|
| 9531 Laundry and Dry-Cleaning Services | • Automatic laundry operation (coin-operated)<br>• Baby napkin hire service<br>• Carpet, upholstery and rug cleaning<br>• Clothing, hat or garment (including leather), cleaning service<br>• Curtain and drapery cleaning service | • Dry-cleaning agency operation<br>• Dry-cleaning service laundry agency operation<br>• Laundry and dry-cleaning service<br>• Laundry operation<br>• Linen hire service<br>• Self-service laundry operation<br>• Uniform hire service |

*Source: Australian Bureau of Statistics, Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006 (Revision 2.0)*

Australia's dry-cleaning and laundry sector comprises 5,073[6] enterprises that employ 17,384 people. These companies are primarily located in Victoria, New South Wales and Queensland - see Figure 5.5.2. According to the most recent IBIS World report, the number of businesses in this sector increased by 3.3% between 2019-24 and is expected to rise by 2.4% in 2024-29. While there was a slight decline in total employment between 2019-24 (0.9%), it is predicted that employment in the sector will increase by 2.5% in 2024-29.

**Figure 5.5.2 Location of dry cleaning and laundry enterprises**

| State/Territory | Establishments [% of total] |
|---|---|
| NSW | 35.2 |
| QLD | 16.7 |
| VIC | 30.1 |
| SA | 5.5 |
| WA | 8.8 |
| TAS | 1.8 |
| ACT | 1.3 |
| NT | 0.6 |

*Source: IBISWorld 2025*

While laundry and dry-cleaning operations are closely related, they operate in distinctly different environments. The laundry sector includes different types of establishments, including commercial, industrial, public, and on-premises laundries (OPL) and laundromats. A supply chain supporting these businesses provides machinery, textiles, and software products. Laundries provide hygienic cleaning services to businesses like hotels, aged care facilities, Airbnb's, function centres, hospitals, clinics, surgeries, spas, and food preparation organisations. These services can be provided under contracts, temporary arrangements, or through OPL services. This sector operates under the guidelines of the Australian Standard for Laundry Practice (AS 4146:2024) released on 2 December 2024, which outlines protocols to ensure that textiles and materials are cleaned hygienically and meet health and accommodation standards.

In Australia, there are approximately 500 laundry businesses that employ about 13,500 people. The industry is mainly concentrated in the eastern states – New South Wales, Victoria, and Queensland. In large commercial laundries, it is common to have over 100 staff members working per shift, while a laundromat may operate with a single employee. Some commercial laundries can process more than 100 tonnes of laundry daily, relying on highly efficient and increasingly automated machines.

[6] *Source: IBISWorld data on total number of establishments in 2024-25*

Many other industries, such as healthcare and hospitality, have outsourced laundry services to cut costs and improve efficiency. Contract management is becoming more important in understanding and interpreting expectations, service requirements, and standards. While on-premises laundries are significantly declining in favour of outsourcing, they still exist in sectors such as hotels, aged care facilities, and hospital facilities.

Dry cleaning operations range from large industrial facilities to small shop-front operations. However, most of these establishments are small businesses. The dry-cleaning process involves cleaning fabrics using non-aqueous organic solvents. The general steps in this process include inspecting the garment, removing spots and stains, washing the garment in solvent, spinning to extract excess solvent, drying the garment in a hot air stream, and finishing the garment through steaming or pressing.

As shown in Figure 5.5.3, in 2023, most dry cleaning and laundry businesses were non-employing (59.1%) or employed less than four people (30.0%).

**Figure 5.5.3 Number of dry-cleaning and laundry businesses, 2023**

| ANZSIC Sub-sector | Non employing | 1-4 Employees | 5-19 Employees | 20-199 Employees | 200+ Employees | Total |
|---|---|---|---|---|---|---|
| Laundry and Dry-Cleaning Services | 2,889 | 1,468 | 395 | 119 | 10 | 4,881 |
| % of all laundry and drycleaning and companies | 59.1% | 30.0% | 8.0% | 2.4% | 0.2% | 100% |

*Source: ABS, 2023, 8165.0 Counts of Australian Businesses, Entries and Exits, June 2019 to June 2023*

The laundry and dry-cleaning industry's largest companies, have major contracts in the health, pharmaceutical, food processing and hospitality sectors. Beyond these companies, the industry is highly fragmented. In regional areas, mid-size companies often dominate the commercial laundry, dry-cleaning and linen hire services. Small family-owned businesses mostly provide consumer laundry and dry-cleaning, independently or under a franchise agreement.

As indicated in Figure 5.5.3, nearly 60% of businesses operate without employees. 93.5% of the industry's employing enterprises have fewer than 20 employees, reflecting the widespread presence of small-scale operations.

As shown in Figure 5.5.4, the main services provided in the sector are:

- laundering and rental services
- dry-cleaning services
- carpet cleaning services
- laundrette provision.

The largest product segment is laundry and rental services, accounting for over 55% of total industry sales.

**Figure 5.5.4 Dry-Cleaning and Laundry Services in Australia**

| Products | Total sales [$ million AUD] | Percentage of total sales |
|---|---|---|
| Laundering and rental services | 1,300.9 | 55.7 |
| Dry-cleaning services | 408.0 | 17.8 |
| Carpet cleaning services | 327.8 | 14.3 |
| Laundrette provision | 279.6 | 12.2 |

*Source: IbisWorld 2025*

### 5.5.2 Economic landscape

In 2024, the dry cleaning and laundry industry generated $2.3 billion in revenue. This marks a decline of 3.4% from 2019 to 2024, primarily due to the pandemic. A growth of 2.3% is expected between 2024 and 2029.

The industry is primarily domestically focused and has faced challenges due to changing consumer preferences and COVID-19.

Demand for laundering and rental services has increased, because many hospitality businesses have turned to outsourcing. However, the demand for dry-cleaning services has decreased due to the rise in popularity of wash-and-wear fabrics and an increase in work-from-home arrangements. In addition, shifting consumer preferences away from carpet and textile floor coverings towards polished floorboards and tiles have led to a decline in demand for carpet cleaning services. Urbanisation has driven up the demand for laundrettes, especially in areas with lower socioeconomic status.

Healthcare providers represent the largest market for the industry, encompassing hospitals, medical clinics, nursing homes, and aged-care facilities. These organisations require a variety of laundering and rental services, such as bed linen, bathroom linen, and uniforms. Due to their operations in highly hygienic and controlled environments, strict standards apply to the laundering of linen and uniforms. Demand from healthcare providers has grown as they increasingly outsource these services.

Environmental concerns over the chemicals used in dry-cleaning have also influenced consumer preferences, leading to a decreased demand for clothing that requires dry-cleaning.

Hospitality service providers, including hotels, resorts, caterers, restaurants, and cafes, also require laundering and rental services for bed linen, table linen, bathroom linen, uniforms, and other products. While these companies historically managed their own linen laundering, many are now outsourcing these services to reduce operating costs. The demand from this market segment was negatively impacted by the COVID-19 pandemic, especially from 2021 to 2022.

Other sectors that utilise laundry and dry-cleaning services include government institutions, such as prisons, and private companies in the mining, engineering, and manufacturing industries.

### 5.5.3 Demographics

17,384 people are employed in the dry cleaning and laundry services industry. This is a slight decrease over the 17,178 people employed in the industry at the time of the ABS 2021 Census of Population and Housing.

At that time, as shown in Figures 5.5.5 and 5.5.6, women comprised 52% of the workforce, and Indigenous people formed 2% of the workforce.

**Figure 5.5.5 Dry-Cleaning and Laundry Services - gender of workforce 2021**

| Gender | % of total workforce |
|---|---|
| Male | 50 |
| Female | 50 |

*Source: Census of Population and Housing, 2021*

**Figure 5.5.6 Dry-Cleaning and Laundry Services - employment of First Nations people 2021**

| Indigenous / Non-Indigenous | % of total workforce |
|---|---|
| Indigenous | 2 |
| Non-Indigenous | 98 |

*Source: Census of Population and Housing, 2021*

While most people working in the industry in 2021, as shown in Figure 5.5.7, were born in Australia (57%), there was a significant number of workers who were born in Asia (31%), particularly South-East Asia (15%).

**Figure 5.5.7 Dry-Cleaning and Laundry Services - employment of culturally and linguistically diverse people 2021**

| Region of birth | % of workforce |
|---|---|
| Australia | 57 |
| South-East Asia | 15 |
| North-East Asia | 6 |
| Southern and Central Asia | 10 |
| North-West Europe | 4 |
| Southern and Eastern Europe | 3 |
| Sub Saharan Africa | 2 |
| North Africa and the Middle East | 2 |
| Americas | 1 |

*Source: Census of Population and Housing, 2021*

There is a notable concentration of older workers in the dry cleaning and laundry industry. As shown in Figure 5.5.8, the most significant portion of the workforce fell within the 50-59 age group, comprising 27% of the total workforce. Overall, 69% of workers in the industry were aged

over 40. This suggests that many experienced workers will retire shortly. As a result, there is an urgent need for focused recruitment, training, and retention initiatives directed at younger people to ensure the industry's long-term operational stability.

The dry cleaning and laundry industry has a relatively low representation of younger workers. The 20-29 age group accounts for only 13% of the workforce, and the 15-19 age group comprises just 2%. The low number of younger workers is attributable to the industry's limited appeal to young workers, inadequate efforts to recruit and retain young people, the availability of relevant training and education programs, and the perceived lack of career prospects within the sector. If this trend persists, the industry is likely to face ongoing skill shortages, which are exacerbated by the retirement of older workers.

**Figure 5.5.8 Dry-Cleaning and Laundry Services - age distribution of workforce 2021**

| Age Structure | % of workforce |
|---|---|
| 15-19 years | 2 |
| 20-29 years | 13 |
| 30-39 years | 17 |
| 40-49 years | 22 |
| 50-59 years | 27 |
| 60-69 years | 17 |
| 70-79 years | 3 |

*Source: Census of Population and Housing, 2021*

As shown in Figure 5.5.9, 58% of the people working in the industry have a secondary education as their highest level of education. This includes 9% who have completed Year 9 and below and 49% who have completed Year 10 and above. About 17% of workers hold a Certificate III or IV. Diploma and Advanced Diploma holders constitute 9% of the workforce. Workers with higher education qualifications, including bachelor's degrees, graduate diplomas, and graduate certificates, make up 16% of the workforce.

**Figure 5.5.9 Dry-Cleaning and Laundry Services - education level of workforce 2021**

| Level of education | % of workforce |
|---|---|
| Secondary education – Year 9 and below | 9 |
| Secondary education – Year 10 and above | 49 |
| Certificate III and IV | 17 |
| Advanced Diploma and Diploma | 9 |
| Bachelor's degree | 12 |
| Graduate Diploma and Graduate Certificate | 1 |
| Postgraduate degree | 3 |

*Source: Census of Population and Housing, 2021*

### 5.5.4 New technologies and materials

Technological advancements are significantly impacting both the dry-cleaning and laundry sectors.

In the laundry industry, businesses are moving away from labour-intensive and energy-inefficient washer-extractors and are opting for more economical continuous-batch washing machines. Innovative technologies that utilise the Internet of Things (IoT), connectivity, and data analytics are entering the industry. These technologies range from remote monitoring of machines to predictive maintenance and automated supply reordering.

Businesses are also adopting energy-efficient commercial laundry equipment to minimise their environmental impact and reduce operational costs. Modern washers and dryers feature low water usage, improved heat recovery, and optimised drying cycles.

Automation and robotics are poised to transform the laundry industry. Automated systems for sorting, folding, and packing laundry are becoming more common.

In addition, contactless payment solutions are becoming more common in the commercial laundry sector. Many laundry businesses are implementing payment systems that accept mobile payments, contactless cards, and online transactions.

For larger operations, logistics solutions have become essential. For instance, route optimisation software lets companies determine the most efficient delivery routes by considering location, traffic conditions, and delivery schedules. This approach helps save travel time, reduce fuel costs, and enhance overall fleet efficiency.

The dry-cleaning sector is experiencing similar changes. Traditional dry-cleaning methods often use perchloroethylene (PERC), a known carcinogen. Many dry cleaners are transitioning to alternative methods, such as wet cleaning or liquid $CO_2$.

Technological advancements have automated dry-cleaning processes, including garment sorting and pressing. Automated garment sorting systems utilise barcodes or RFID tags to categorise garments by type, colour, and size, thereby reducing the need for manual sorting and increasing accuracy. Robotic pressing machines improve garment quality by reducing the risk of damage.

Another emerging trend in the dry-cleaning industry is the rise of mobile and on-demand services. Many businesses now allow customers to schedule pick-up and delivery of their garments through their smartphones or computers.

Environmental sustainability is gaining traction in both the laundry and dry-cleaning sectors, driven by environmental regulations and the demands of eco-conscious clients. As these standards become more stringent, new skill requirements are emerging, particularly in the areas of chemical storage and wastewater disposal. Furthermore, infection control and hygienically driven cleaning are becoming increasingly critical, especially in sectors like aged care and healthcare, where specialised laundries must adhere to specific washing, drying, and handling standards for linens used in the health industry.

### 5.5.5 Occupations

In 2021, out of the 17,178 people employed in the dry-cleaning and laundry services industry, 7,409 held positions related explicitly to dry-cleaning and laundry operations. The remaining people worked in support roles, which include administration, procurement, human resources, logistics and management positions. This pattern aligns with the broader TCF industry, where it is

estimated that approximately 40% of the workforce is engaged in jobs specific to TCF production, while the remaining 60% work in essential support functions, many of which are common across various industries.

Figure 5.5.10 illustrates the various types of specialist job roles and their alignment with the Australian Qualifications Framework.

**Figure 5.5.10 Dry-Cleaning and Laundry Services - occupations and specialisations in the TCF industry**

| AQF Level | Dry-cleaning and Laundry Services |
|---|---|
| 2-3 | Laundry Operator:<br>Folding Machine Operator<br>Linen Sorter<br>Counter staff<br>Spotter Ironer or Presser<br>Hospital Laundry<br>Laundry Supervisor<br>Dry Cleaner<br>Dry Cleaning Leading Hand |
| 4 | |
| 5 | |
| 6 | Operations Manager |

Figure 5.5.11 shows employment in specialised dry-cleaning and laundry services job roles according to the ANZSCO classification of occupations.

**Figure 5.5.11: Dry-Cleaning and Laundry Services - employment in specialised occupations (ANZSCO 4 and 6-digit level) by sector, 2021**

| Occupations (ANZSCO 4 and 6-digit) | | Number of employees |
|---|---|---|
| 3931 Canvas and Leather Goods Makers | 393213 Dressmaker or Tailor | 141 |
| 7117 Textile and Footwear Production Machine Operators | 711799 Textile and Footwear Production Machine Operators nfd | 4 |
| | 711611 Sewing Machinist | 77 |
| 9531 Laundry and dry-cleaning services | 811511 Laundry Worker [General] | 5,295 |
| | 811512 Drycleaner | 1,508 |
| | 811513 Ironer or Presser | 384 |
| Total | | 7,409 |

The industry's two largest specialist occupations in 2021 were Laundry Workers and Dry-cleaners. Compared with all occupations in the Australian workforce (see Figure 5.5.12), workers in these two occupations tend to be female, older, have lower educational attainment, and are more likely to be employed part-time.

**Figure 5.5.12 Dry-Cleaning and Laundry Services – key employment-related characteristics of major specialist occupational groups**

| Characteristics | All Occupations in Australian Workforce | Laundry Worker [General] | Dry-cleaner |
|---|---|---|---|
| Highest level of educational attainment – Year 12 and below | 26.0% | 62.3% | 73.5% |
| Median age | 40 years | 49 years | 51 years |
| Female share of employment | 49% | 71% | 59% |
| Share of workers who work full-time hours | 64% | 44% | 38% |
| Average full-time hours worked per week | 35 hours | 40 hours | 44 hours |
| % of workforce aged 45 years and older | 40.6% | 59.4% | 54.7% |

*Source: Jobs and Skills Australia based on ABS, 2021 Census of Population and Housing*

### 5.5.6 Skill needs

In the dry-cleaning sector, there are shortages of:

- trade-qualified dry cleaners
- spotters
- pressers
- counter staff.

In the laundry sector, there are shortages of:

- pressers
- ironers using manual or automatic machines
- operators of washing and drying machines.

The technological changes impacting on both the dry-cleaning and laundry services sectors are likely to increase demand for skills in:

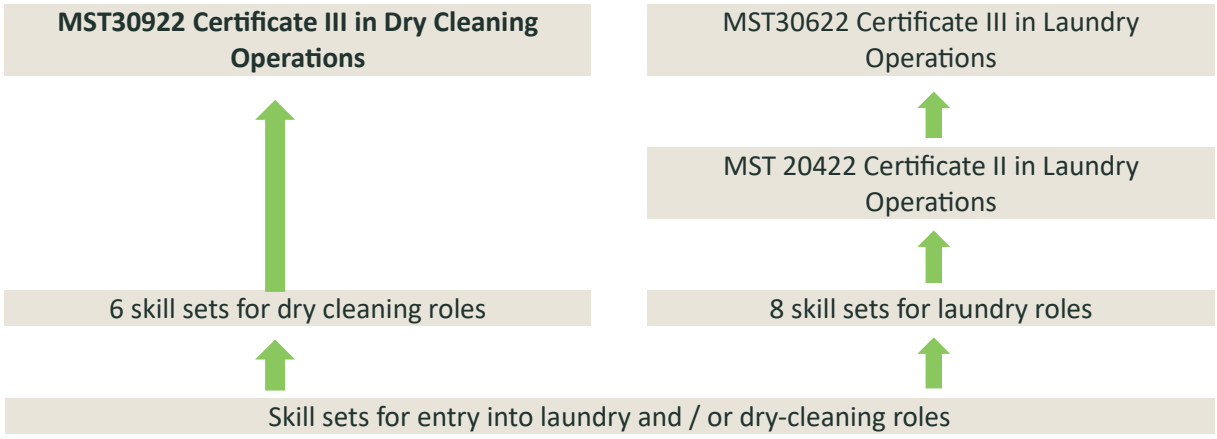
- automated equipment and plant maintenance and repair
- logistics
- business software applications, including mobile technologies for small businesses.

### 5.5.7 MST Training Package qualifications and skill sets

While there are a range of dry cleaning and laundry qualifications and skill sets in the MST Training Package, most new entrants to the industry typically receive on-the-job, that is not formally recognised.

The qualification pathway for the dry-cleaning and laundry industry in the *MST Textiles, Clothing and Footwear Training Package* [MST30519] Training Package is shown in Figure 5.5.13.

**Figure 5.5.13. Dry-Cleaning and Laundry Services qualification pathway**




*Note: Bold font indicates approval for delivery as apprenticeship*

The *MST30922 Certificate III in Dry Cleaning Operations*, which may be offered as an apprenticeship, is intended for those who work as dry cleaners. There are eight skill sets that individuals can undertake that provide credit towards this qualification. *MST 20422 Certificate II in Laundry Operations* describes the skills required to undertake operational and support functions within a laundry. The *MST30622 Certificate III in Laundry Operations* is intended for those who perform specialised technical tasks or multi-skilled roles within a commercial laundry environment, including staff supervision. There are ten skill sets that individuals can undertake that provide credit towards these laundry-related qualifications.

#### 5.5.7.1 Registered training organisations offering training package qualifications

As indicated in Figure 5.5.14, only one registered training organisation offers the *MST30922 Certificate III in Dry Cleaning Operations*. There are five providers of the *MST 20422 Certificate II in Laundry Operations* and the *MST30622 Certificate III in Laundry Operations*. It is interesting to note that Bendigo Kangan TAFE is the only TAFE-provider of qualifications in this sector, even though this sector has the largest number of employees in the TCF industry.

**Figure 5.5.14 Registered training organisations – Dry Cleaning and Laundry Services qualifications on scope of registration**

| MST30922 Certificate III in Dry Cleaning Operations | | MST 20422 Certificate II in Laundry Operations | |
|---|---|---|---|
| **RTO** | **Jurisdiction** | **RTO** | **Jurisdiction** |
| The LDC Group Asia Pacific Pty Ltd | NSW | Bendigo Kangan TAFE | VIC |
| | | Civil Safety Pty Ltd | QLD |
| | | Aspire to Succeed Pty Ltd | QLD |
| | | The LDC Group Asia Pacific Pty Ltd | NSW |
| | | Australian College of Training Pty Ltd | WA |

| MST30622 Certificate III in Laundry Operations | |
|---|---|
| Aspire to Succeed Pty Ltd | QLD |
| The LDC Group Asia Pacific Pty Ltd | NSW |
| Stanborough Wemyss Contracting Pty Ltd | VIC |
| Precision Training Australia Pty Ltd | QLD |
| Innovative Learning Solutions Pty Ltd | NSW |

*Source: training.gov.au Feb 2025*

### 5.5.7.2 Enrolment and completion of training package qualifications

Enrolments in the MST 20422 Certificate II in Laundry Operations and the MST30622 Certificate III in Laundry Operations slowly increased between 2019-23. Total enrolments peaked at about 100 students per year in Certificate II and Certificate III in 2023. As illustrated in Figure 5.5.15, many of these students were enrolled in the program through a traineeship. For example, in 2023, 95 of the 115 students enrolled in the MST30622 Certificate III in Laundry Operations were undertaking a traineeship. The MST30922 Certificate III in Dry Cleaning Operations, the apprenticeship program for dry cleaners, had only 25 enrolments in 2019-23

**Figure 5.5.15. Enrolments in Dry-Cleaning and Laundry Services qualifications 2019-2023 – number of students**

| Qualification | Gender | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| MST 20422 Certificate II in Laundry Operations | Male | 55 | 50 | 35 | 60 | 100 |
| | Female | 5 | 10 | 10 | 5 | 5 |
| | Apprenticeship / traineeship | 35 | 55 | 40 | 25 | 25 |
| | **Total** | **60** | **60** | **45** | **65** | **105** |
| MST30622 Certificate III in | Male | 35 | 70 | 90 | 45 | 75 |
| | Female | 15 | 20 | 40 | 30 | 40 |

| | | | | | | |
|---|---|---|---|---|---|---|
| Laundry Operations | Apprenticeship / traineeship | 35 | 55 | 85 | 35 | 95 |
| | **Total** | **50** | **90** | **130** | **75** | **115** |
| MST30922 Certificate III in Dry Cleaning Operations | Male | - | - | 5 | - | 5 |
| | Female | - | - | 10 | - | 20 |
| | Apprenticeship / traineeship | - | - | 5 – female apprentices | - | 15 – female apprentices |
| | **Total** | **-** | **-** | **15** | **-** | **25** |

Figure 5.5.16 shows that 45 students completed the *MST 20422 Certificate II in Laundry Operations* and 165 students completed the *MST30622 Certificate III in Laundry Operations* in 2019-23. Only 15 students completed the *MST30922 Certificate III in Dry Cleaning Operations* in 2019-23.

**Figure 5.5.16. Completion of Dry-Cleaning and Laundry Services qualifications 2019-2023 – number of graduates**

| Qualification | Gender | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| MST 20422 Certificate II in Laundry Operations | Male | 5 | 5 | 5 | 5 | - |
| | Female | 5 | 5 | 5 | 5 | 5 |
| | **Total** | **10** | **10** | **10** | **10** | **5** |
| MST30622 Certificate III in Laundry Operations | Male | 10 | 25 | 25 | 20 | 30 |
| | Female | 5 | 5 | 20 | 15 | 15 |
| | **Total** | **15** | **30** | **45** | **35** | **45** |
| MST30922 Certificate III in Dry Cleaning Operations | Male | - | - | - | - | 10 |
| | Female | - | - | - | - | 5 |
| | **Total** | **-** | **-** | **-** | **-** | **15** |

A range of skill sets have been developed to address specific skill needs in the laundry operations and dry-cleaning sectors. This is a relatively new development. Currently skill sets *MSTSS00003 - Introduction to Laundry Operations* and *MSTSS00005 - Control Hygiene in Laundry Operations* are offered by eleven RTOs and skill set *MSTSS00007 - Sustainable Practices in Dry Cleaning Operations* is offered by one NSW-based RTO – see Figure 5.5.17.

**Figure 5.5.17. Registered training organisations – skill sets on scope of registration**

| **MST30622 Certificate III in Laundry Operations** | | | |
|---|---|---|---|
| | MSTSS00003 - Introduction to Laundry Operations Skill Set | MSTSS00005 - Control Hygiene in Laundry Operations Skill Set | MSTSS00007 - Sustainable Practices in Dry Cleaning Operations Skill Set |

| | | | |
|---|---|---|---|
| Holmesglen Institute | ✓ | ✓ | |
| BSI Learning Institute Pty Ltd | | ✓ | |
| Bendigo Kangan Institute | ✓ | ✓ | |
| Civil Safety Pty Ltd | ✓ | ✓ | |
| Aspire to Succeed Pty Ltd | ✓ | ✓ | |
| The LDC Group Asia Pacific Pty Ltd | ✓ | ✓ | ✓ |
| Stanborough Wemyss Contracting Pty ltd | | ✓ | |
| Australian College of Training Pty Ltd | ✓ | ✓ | |
| Technical and Further Education Commission | ✓ | ✓ | |
| Precision Training Australia Pty Ltd | | ✓ | |
| Innovative Learning Solutions Pty Ltd | ✓ | ✓ | |

*Source: training.gov.au March 2025*

As shown in Figure 5.5.18, enrolments in these skills sets is relatively low, although there is some indication that enrolments have grown between 2020 and 2023. Completion rates are much higher than full qualifications, with 100% of the learners enrolling in the two laundry operation skills sets completing the program in 2023.

**Figure 5.5.18. Enrolments and completions in Dry-Cleaning and Laundry Services skill sets 2019-2023 – number of students**

| Skill set | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|
| Enrolments | | | | | |
| MSTSS00003 - Introduction to Laundry Operations Skill Set | - | - | - | - | 20 |
| MSTSS00005 - Control Hygiene in Laundry Operations Skill Set | - | *5* | *45* | - | *55* |
| MSTSS00007 - Sustainable Practices in Dry Cleaning Operations Skill Set | - | - | 20 | - | - |
| Completions | | | | | |
| MSTSS00003 - Introduction to Laundry Operations Skill Set | - | - | - | - | 20 |
| MSTSS00005 - Control Hygiene in Laundry Operations Skill Set | - | - | *5* | *45* | *55* |

| | | | | | |
|---|---|---|---|---|---|
| MSTSS00007 - Sustainable Practices in Dry Cleaning Operations Skill Set | - | - | - | 25 | - |

*Source: NCVER 2024, Total VET students and courses 2023: program enrolments DataBuilder, Total, Program name by Year*

### 5.5.7.3 Observations on the uptake of nationally recognised qualifications in Dry-Cleaning and Laundry Services

There is limited uptake of the qualifications in the *MST Textiles, Clothing and Footwear Training Package* [MST30519] in the Dry-Cleaning and Laundry Services sector, with most employees acquiring their skills through informal, on-the-job learning.

Enrolments in nationally recognised qualifications in this sector are very low, with only 245 students enrolling in the following qualifications in 2023:

- *MST 20422 Certificate II in Laundry Operations* (105 enrolments)
- *MST30622 Certificate III in Laundry Operations* (115 enrolments)
- *MST30922 Certificate III in Dry Cleaning Operations* (25 enrolments).

Completion rates in these qualifications are also low. In 2023, only 65 individuals in total completed the following qualifications:

- *MST 20422 Certificate II in Laundry Operations* (5 completions)
- *MST30622 Certificate III in Laundry Operations* (45 completions)
- *MST30922 Certificate III in Dry Cleaning Operations* (15 completions).

There is limited provision of these qualifications. Five RTOs offer Certificate II and III in Laundry Operations and only one NSW - based RTO provides *MST30922 Certificate III in Dry Cleaning Operations*.

There is significant potential to expand the provision of Recognition of Prior Learning in this sector. Over half of the nearly 17,500 employees in the sector have a secondary school education as their highest qualification, with approximately 9% only having completed Year 9.

There appears to be a high level of non-completion in the traineeship pathways in *MST 20422 Certificate II in Laundry Operations* and *MST30622 Certificate III in Laundry Operations*. 305 trainees were enrolled in these qualifications in 2021-23; however, only 150 students completed these qualifications during this period – this includes learners who were not enrolled in a traineeship pathway.

Additionally, the primary apprenticeship program in this sector, the Certificate III in Dry Cleaning Operations, is only offered by one Queensland-based RTO and had only 15 graduates in 2019-23.

There appears to be a modest growth in skill set enrolments in laundry operations, rising from 5 in 2020 to 75 in 2023. However, this is a small cohort when compared with the total laundry workforce. It is also notable that virtually all the people who enrolled went onto complete these programs. Enrolments in dry-cleaning skill sets is more restricted with 20 enrolments and no completions in 2021-23. A significant influence on enrolments and completions in dry-cleaning skill

sets may be that one NSW based RTO offers this skill set. The growth in laundry operations skill sets, albeit small, may indicate that there is demand for shorter, skill focused programs rather than full qualifications.

## 5.6 Clothing and Footwear Repairs and Alterations Services

### 5.6.1 Sector profile

Enterprises in Clothing and Footwear Repairs and Alterations, repair and alter clothing and footwear items. The key activities conducted in this sector are listed in Figure 5.6.1.

**Figure 5.6.1 Clothing and Footwear Repairs and Alterations activities covered by ANZSIC Classification**

| ANZIC industry class | Main activities |
|---|---|
| 9491 Clothing and Footwear Repair | Clothing repair<br>Footwear (including boot and shoe) repair |

*Source: Australian Bureau of Statistics, Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006 (Revision 2.0)*

The repairs and alterations sector comprises 763[7] enterprises, primarily concentrated in Victoria, Queensland and New South Wales - see Figure 5.6.2. More than 80% of companies are in these three states. In contrast, the Northern Territory, Tasmania, and the Australian Capital Territory have minimal activity in this sector.

**Figure 5.6.2 Location of Clothing and Footwear Repairs and Alterations enterprises**

| State/Territory | Establishments [% of total] |
|---|---|
| NSW | 27.0 |
| QLD | 12.6 |
| VIC | 42.1 |
| SA | 5.2 |
| WA | 9.8 |
| TAS | 0.6 |
| ACT | 2.3 |
| NT | 0.4 |

*Source: IBISWorld 2025*

As shown in Figure 5.6.3, in 2023, almost half of all Clothing and Footwear Repairs and Alterations businesses are non-employing [47.0%] or employ less than four people [46.2%].

[7] Source: IBISWorld data on total number of establishments in 2024-25

**Figure 5.6.3 Number of Clothing and Footwear Repairs and Alterations businesses, 2023**

| ANZSIC Sub-sector | Non employing | 1-4 Employees | 5-19 Employees | 20-199 Employees | 200+ Employees | Total |
|---|---|---|---|---|---|---|
| Clothing and Footwear Repairs and Alterations | 366 | 360 | 49 | 3 | 0 | 778 |
| % of all Clothing and Footwear Repairs and Alterations companies | 47.0% | 46.2% | 6.2% | 0.3% | 0.0% | 100% |

*Source: ABS, 2023, 8165.0 Counts of Australian Businesses, Entries and Exits, June 2019 to June 2023*

Based on sales revenue, Minit Australia (15.3%) and Looksmart Alterations (14.1%) are the largest companies. Minit Australia offers a comprehensive range of shoe repair, key cutting, engraving and smart phone repair services. Whereas Looksmart focuses on clothing alterations. The remainder of the industry consists of small, independent operators.

Figure 5.6.3 shows that 47% of businesses operate without employees. Over 87.3% of the industry's employing enterprises have fewer than 4 employees, reflecting the widespread presence of small-scale operations.

While the repair and alterations sector has had a challenging time, the number of businesses has risen steadily. In 2007-8, 705 enterprises operated at 1,142 locations in Australia. By 2024-5, this has increased to 763 enterprises operating at 1,289 locations.

There has been a corresponding rise in employment in the sector, increasing from 2,832 people in 2007-8 to 3,068 in 2024-5. It is estimated that employment in the sector increased 1.6% per year from 2020 to 2025, and it is predicted that employment may increase by only 1.7% over the next five years.

As shown in Figure 5.6.4, the main services provided in the sector are:

- clothing alterations
- clothing repairs
- footwear repairs.

**Figure 5.6.4 Clothing and Footwear Repairs and Alterations Sales Revenue - Australia**

| Products | Total sales [$ million AUD] | Percentage of total sales |
|---|---|---|
| Clothing alterations | 153.2 | 44.2 |
| Clothing repairs | 101.9 | 29.4 |
| Footwear repairs | 91.5 | 26.4 |

*Source: IbisWorld 2025*

### 5.6.2 Economic landscape

In 2024, the industry generated $346.5 million in revenue. Sales revenue grew by 0.9% between 2020 and 2025. It is expected to increase by 2.0% in the next five years, reaching $388.9 million in 2030.

The industry is primarily focused on the domestic market, and its economic performance is heavily influenced by consumer sentiment, household disposable income and purchasing preferences. When consumer confidence is high, people are more inclined to buy new products instead of repairing their existing clothes and footwear. However, changing attitudes towards circularity, sustainability, and recycling can boost activity in the repairs and alterations industry. Additionally, factors such as the rise of fast fashion, the growth of online shopping, and tariff reductions on imported clothing and footwear due to free trade agreements can also impact the level of activity in this sector.

The latest IBISWorld report notes that '… the rise of fast fashion has led to a decrease in repair demand, while population growth and upcycling trends present growth opportunities for clothing and footwear repair businesses. Despite competitive pressures, profits have remained relatively steady. However, pandemic restrictions have negatively impacted instore repair services.'

It is likely that larger operations, such as Minit Australia and Looksmart Alterations, will expand their store networks, and this will place smaller independent operators under pressure. Businesses in the sector are highly dependent on skilled workers to carry out repairs and alterations. The ageing of the TCF workforce is likely to mean that businesses will continue to have problems attracting experienced tradespeople such as machinists, cutters, sewers, leather workers and shoe repairers.

While the growth of fast fashion, online shopping and cheaper footwear and clothing imports have negatively impacted the repairs and alteration sector, it is possible that this could also stimulate the industry as consumers seek out repairers to adjust cheaper, ill-fitting garments. The move to the circular economy is also likely to drive business activity in the sector.

### 5.6.3 Demographics

As noted earlier in this report, 3,068 people were employed in the Clothing and Footwear Repairs and Alterations sector in 2024-5. This is a slight decrease over the 3,199 people employed in the industry at time of the ABS 2021 Census of Population and Housing.

At that time, as shown in Figures 5.6.5 and 5.6.6, women comprised 60% of the workforce, and Indigenous people formed 1% of the workforce.

**Figure 5.6.5 Clothing and Footwear Repairs and Alterations - gender of workforce 2021**

| Gender | % of total workforce |
|---|---|
| Male | 40 |
| Female | 60 |

*Source: Census of Population and Housing, 2021*

**Figure 5.6.6 Clothing and Footwear Repairs and Alterations - employment of First Nations people 2021**

| Indigenous / Non-Indigenous | % of total workforce |
|---|---|
| Indigenous | 1 |
| Non-Indigenous | 99 |

*Source: Census of Population and Housing, 2021*

While most people working in the industry in 2021, as shown in Figure 5.6.7, were born in Australia (48%), there was a significant number of workers who were born in Asia (33%), particularly South-East Asia (18%). The sector has one of the lowest concentrations of Australian-born workers in the TCF industry, and one of the highest proportions of workers born in South-East Asia.

**Figure 5.6.7. Clothing and Footwear Repairs and Alterations - employment of culturally and linguistically diverse people 2021**

| Region of birth | % of workforce |
|---|---|
| Australia | 48 |
| South-East Asia | 18 |
| North-East Asia | 10 |
| Southern and Central Asia | 5 |
| North-West Europe | 5 |
| Southern and Eastern Europe | 7 |
| Sub Saharan Africa | 1 |
| North Africa and the Middle East | 4 |
| Americas | 1 |

*Source: Census of Population and Housing, 2021*

There is a notable concentration of older workers in the repairs and alterations industry. As shown in Figure 5.6.8, the most significant portion of the workforce fell within the 50-59 age group, comprising 31% of the total workforce. Overall, 75% of workers in the industry were aged over 40. This suggests that many experienced workers will retire shortly. As a result, there is an urgent need for focused recruitment, training, and retention initiatives directed at younger people to ensure the industry's long-term operational stability.

The repairs and alterations sector has a very low representation of young workers. The 20-29 age group accounts for only 10% of the workforce, and the 15-19 age group comprises just 1%. The low number of younger workers is attributable to the industry's limited appeal to young workers, inadequate efforts to recruit and retain young people, the availability of relevant training and education programs, and the perceived lack of career prospects within the sector. It possibly also reflects the industry's need for experienced, multi skilled workers and the fact that some workers may view employment in the sector as a transition to retirement. However, if this trend persists, the industry is likely to face ongoing skill shortages, which are exacerbated by the retirement of older workers.

**Figure 5.6.8. Clothing and Footwear Repairs and Alterations - age distribution of workforce 2021**

| Age Structure | % of workforce |
|---|---|
| 15-19 years | 1 |
| 20-29 years | 10 |
| 30-39 years | 13 |
| 40-49 years | 19 |
| 50-59 years | 31 |
| 60-69 years | 21 |
| 70-79 years | 4 |

*Source: Census of Population and Housing, 2021*

As shown in Figure 5.6.9, 53% of the people working in the repairs and alterations sector have a secondary education as their highest level of education. This includes 10% who have completed Year 9 and below and 43% who have completed Year 10 and above. About 20% of workers hold a Certificate III or IV – this may reflect the need for trade-level skills in the industry. Diploma and Advanced Diploma holders constitute 12% of the workforce. Workers with higher education qualifications, including bachelor's degrees, graduate diplomas, and graduate certificates, make up 15% of the workforce.

**Figure 5.6.9. Clothing and Footwear Repairs and Alterations - education level of workforce 2021**

| Level of education | % of workforce |
|---|---|
| Secondary education – Year 9 and below | 10 |
| Secondary education – Year 10 and above | 43 |
| Certificate III and IV | 20 |
| Advanced Diploma and Diploma | 12 |
| Bachelor's degree | 12 |
| Graduate Diploma and Graduate Certificate | 1 |
| Postgraduate degree | 2 |

*Source: Census of Population and Housing, 2021*

### 5.6.4 New technologies and materials

The Clothing and Footwear Repairs and Alterations sector has been slow to adopt new technologies and materials.

The industry heavily relies on skilled machinists, cutters, and shoe repairers, often prioritising craft skills over technological advancements. However, there is emerging evidence that artificial intelligence and automation are beginning to influence the repair and alteration market. Some businesses are now using computerised sewing machines and other advanced equipment, allowing quicker and more precise alterations, enabling them to serve a larger volume of customers. In the future, AI tools will likely be employed to diagnose damage and recommend repair options. Introducing these technologies can help reduce human error, improve efficiency, and streamline repair processes.

There has been a significant uptake of new technology in two areas: point-of-sale systems and web-based customer information services, which offer greater efficiency, cost management, and customer service.

### 5.6.5 Occupations

In 2021, out of the 3,199 people employed in the repairs and alterations sector, 1,617 (50.5%) held positions related explicitly to Clothing and Footwear Repair and Alterations. The remaining people worked in support roles, which include administration, procurement, human resources, logistics and management positions. The portion of people working in specialist roles is higher in the repairs and alterations sector than other areas of the TCF industry. This reflects the high trade level skill required by people working in this sector.

Figure 5.6.10 illustrates the various types of specialist footwear production roles and their alignment with the Australian Qualifications Framework.

**Figure 5.6.10. Repairs and Alterations - occupations and specialisations in the TCF industry**

| AQF Level | Repairs and Alterations |
|---|---|
| 2 | Production Assistant<br>Counter staff<br>Laundry Workers<br>Pressers or Ironers |
| 3 | Footwear repairer<br>Sewing machinist<br>Dry Cleaners |
| 4 | Dressmaker |
| 5 | |
| 6 | Fashion Designer<br>Operations Manager |

Figure 5.6.11 shows employment in specialised repairs and alterations roles according to the ANZSCO classification of occupations.

**Figure 5.6.11 Repairs and Alterations - employment in specialised occupations (ANZSCO 4 and 6-digit level) by sector, 2021**

| Occupations (ANZSCO 4 and 6-digit) | | Number of employees |
|---|---|---|
| 3931 Canvas and Leather Goods Makers | 393299 Clothing Trade Workers nec | 4 |
| | 393114 Shoemaker | 365 |
| | 393213 Dressmaker or Tailor | 1065 |
| 7117 Textile and Footwear Production Machine Operators | 711611 Sewing Machinist | 157 |

| | | |
|---|---|---|
| 8115 Laundry Workers | 811511 Laundry Worker [General] | 3 |
| | 811512 Dry cleaner | 4 |
| | 811513 Ironer or Presser | 3 |
| 2323 Fashion, Industrial and Jewellery Designers | 23211 Fashion Designer | 16 |
| Total | | 1617 |

The industry's two largest specialist occupations in 2021 were Shoemakers and Dressmakers / Tailors. Compared with all occupations in the Australian workforce (see Figure 5.6.12), workers in these two occupations tend to be older and have lower educational attainment. Interestingly, there is a clear gender divide between these two critical occupations, with shoemakers more likely to be male and dressmakers/tailors more likely to be female. It is also notable that dressmakers/tailors are more likely to work on a part-time basis than shoemakers.

**Figure 5.6.12 Clothing and Footwear Repairs and Alterations – key employment-related characteristics of major specialist occupational groups**

| Characteristics | All Occupations in Australian Workforce | Shoemakers | Dressmakers / Tailors |
|---|---|---|---|
| Highest level of educational attainment – Year 12 and below | 26.0% | 50.5% | 47.1% |
| Median age | 40 years | 51 years | 50 years |
| Female share of employment | 49% | 15% | 85% |
| Share of workers who work full-time hours | 64% | 67% | 42% |
| Average full-time hours worked per week | 35 hours | 42 hours | 43 hours |
| % of workforce aged 45 years and older | 40.6% | 61.8% | 60.7% |

*Source: Jobs and Skills Australia based on ABS, 2021 Census of Population and Housing*

### 5.6.6 Skill needs

Like other sectors in the TCF industry, the Clothing and Footwear Repairs and Alterations sector has reported shortages in the following occupations:

- shoemakers
- sewing machinists
- dressmakers / tailors

- sewers
- pattern makers
- construction workers
- production workers.

### 5.6.7 MST training package qualifications and skill sets

There are no specialist qualifications for Clothing and Footwear Repair and Alterations in the MST training package. However, those seeking training and skills development can:

1. access the following skill sets:
    - *MSTSS00015 Industrial Sewing Skill Set*
    - *MSTSS00016 Clothing Alterations and Repairs Skill Set*
    - *MSTSS00017 Sample Machining Skill Set*
    - *MSTSS00018 Advanced Clothing Alterations and Repairs Skill Set*
    - *MSTSS00011 Ironer Safety Skill Set*
    - *MSTSS00027 Dispose of Waste Products in TCF Operations Skill Set.*
2. access the following qualifications:
    - *MST20722 Certificate II in Apparel, Fashion and Textiles*
    - *MST31022 Certificate III in Apparel, Fashion and Textiles*
    - *MST30416 Certificate III in Footwear*
    - *MST20319 Certificate II in Leather Production*
    - *MST30519 Certificate III in Leather Production.*

#### 5.6.7.1 Registered training organisations offering training package qualifications and skills

Information on the RTOs offering qualifications relevant to the repairs and alterations sector may be found in the sections of this report on the leather, footwear and fashion and apparel sectors. Figure 5.6.13 lists the RTOs that have the skill sets relevant to the repairs and alteration sector on their scope of registration.

**Figure 5.6.13 Registered training organisations – skill sets relevant to Clothing and Footwear Repairs and Alterations on scope of registration**

| RTO | Industrial Sewing | Clothing Alterations and Repairs | Machining | Advanced Clothing Alterations and Repairs | Ironer Safety | Dispose of Waste Products |
|---|---|---|---|---|---|---|
| Aspire to Succeed Pty Ltd | | | | | | ✓ |
| Australian College of Training Pty Ltd | | | | | | ✓ |
| Australian Institute of Fashion Design Pty Ltd | ✓ | | ✓ | | | |
| Bendigo Kangan Institute | ✓ | ✓ | ✓ | ✓ | | |
| Box Hill Institute | ✓ | | | | | |
| Brighton Pacific Pty Ltd | | ✓ | ✓ | ✓ | | |
| Canberra Institute of Technology | | ✓ | ✓ | | | |
| Charlton Brown Pty Ltd | | | ✓ | | | |
| Department of Training and Workforce Development | | | ✓ | | | |
| Holmesglen Institute | ✓ | | ✓ | | | |
| Innovative Learning Solutions | | | | | ✓ | ✓ |
| North Metropolitan TAFE | ✓ | | ✓ | | | |
| Precision Training Pty Ltd | | | | | | ✓ |
| RMIT | ✓ | ✓ | ✓ | | | |

| | | | | | | |
|---|---|---|---|---|---|---|
| South Metropolitan TAFE | ✓ | ✓ | ✓ | ✓ | | |
| South Regional TAFE | ✓ | ✓ | ✓ | | | |
| Stanborough Wemyss Contracting Pty Ltd | | | | | | ✓ |
| Tactile Learning Centre Pty Ltd | ✓ | ✓ | ✓ | | | |
| TAFE Queensland | ✓ | ✓ | ✓ | | | |
| TAFE SA | ✓ | ✓ | ✓ | | | |
| TAS TAFE | | ✓ | ✓ | | | |
| Technical and Further Education Commission | ✓ | ✓ | ✓ | | | ✓ |
| The LDC Group Asia Pacific Pty Ltd | | | | | ✓ | ✓ |
| VICSEG New Futures | | | ✓ | | | |
| Young Rabbit Pty Ltd | | | ✓ | | | |

*Source: training.gov.au Feb 2025*

# 6. Key findings

The research and consultations undertaken for this project highlighted the challenges facing the Australian textiles, clothing and footwear industry. These challenges impact the ability of the industry to maintain competitiveness, innovate and sustain a skilled workforce.

The textile, clothing, and footwear industry is an extensive network of sectors, businesses, and production processes. This network includes companies that manufacture natural and specialised textiles, leather products, garments, and footwear, as well as those that provide related services such as laundry, dry-cleaning, repairs, and alterations for garments and footwear.

Australian manufacturers face stiff competition from lower-cost countries such as China, Bangladesh, and Vietnam who have invested heavily in production capability. This has led many Australian manufacturers to move their operations offshore and scale back domestic production resulting in a significant decline in local manufacturing capability. Those companies that continue to manufacture in Australia have been forced to innovate and increasingly focus on the production of niche, high quality and eco-friendly products. While this strategy has proved successful for many companies, it requires skilled labour that is currently in short supply.

The industry has an ageing workforce, with many experienced workers approaching retirement. As a result, a significant amount of specialised knowledge and skill is at risk of being lost. A prime example of this issue is the current critical shortage of textile mechanics. This problem is further complicated by the lack of younger workers possessing equivalent skills.

Younger workers frequently overlook the textiles, clothing, and footwear industry in favour of more innovative or technologically advanced sectors. This industry faces challenges in attracting young talent because it is often viewed as outdated and associated with low-tech, repetitive tasks. It is also perceived as having limited career and skill development opportunities, insecure employment, and outdated employment practices.

As a result, the industry faces significant skill shortages that affect its competitiveness and sustainability. There are specific shortages in traditional textile, clothing, and footwear occupations, such as machinists and pattern makers. Additionally, as the industry embraces new technologies and materials to stay competitive, it struggles to attract skilled technicians in areas like automation, 3D printing, industrial design, and logistics. This challenge is exacerbated by a lack of information on the new and emerging skills needed within the industry. For example, a recent study of the Victorian TCF sector noted that '… digital printing and screen printing on made-up clothing are not currently categorised under the Australian Bureau of Statistics (ABS) definition of TCF manufacturing (ANZSIC Division C, Subdivision 13). Instead, they fall under the category of printing, alongside activities such as photocopying.'[8] This problem is compounded by how the ANZSCO – now OSCA – has condensed many TCF occupations that require different skill sets – e.g. Pattern Maker now merged with Garment Technician. This can produce a situation in which the number of workers in the TCF Industry is underestimated by the ABS and, as a result, are not reported in the labour force statistics.

Some parts of the industry are slow to embrace new technologies, especially small and medium-sized enterprises which may lack the resources to invest in training or upgrade equipment. This

[8] Underwood, J., Street, P., Payne, A., Carol, T., Kennedy, K., Singh, A., & McCorkill, G. (2024). Victorian TCF Manufacturing: Future Jobs, Technology, and Economic Growth. Australian Fashion Council, Published September 2024.P.8.

resistance to change limits the sector's ability to innovate and grow in a competitive global marketplace.

As the local workforce ages and the ability to attract new workers remains limited, many local manufacturers have increasingly relied on migrant workers to address skill gaps. However, the effectiveness of this approach is constrained by the fact that critical occupations in the textile, clothing and footwear industry - traditionally filled by skilled migrants - are not recognised at a high enough skill level of the Federal Skilled Occupation Lists. For instance, there is a significant shortage of sewing machinists, yet this role is categorised at Skill Level 4. While migrant workers have helped alleviate some labour shortages within the domestic industry, they often require additional support, such as language training, cultural integration, and skill development support. Without sufficient support systems, these migrant workers may struggle to adapt to the Australian workforce, access upgrading programs, and advance in their careers.

Most workers in the industry do not hold formal qualifications and acquire skills through hands-on training and on-the-job experience.

The take up of nationally recognised training is relatively low. In 2023, 5,330 individuals were enrolled in nationally recognised qualifications delivered through the *MST Textiles, Clothing, and Footwear Training Package* [MST30519]. Most of these students were enrolled in fashion and apparel qualifications, with very low levels of enrolments in other TCF sectors. However, many students who enrol in MST qualifications do not complete them. The reasons for the high level of non-completion are complex. However, it appears that it is due to factors such as the length and complexity of the qualifications, the adequacy of career advice, the accuracy of information provided to prospective students on the TCF industry, the lack of flexibility in program delivery methods, and the time required to complete the qualifications.

The consultations conducted for this project indicated wide verbal support for expanding the provision of nationally recognised training in the industry. However, the industry's capacity to extend training provision is hampered by a thin training market, a limited supply of skilled trainers and assessors, a lack of training infrastructure, the need for greater flexibility in the both the design and delivery of training package qualifications, and the scarcity of training providers in regional, rural and remote areas.

Irrespective of these barriers there is a need to expand training opportunities for new entrants through the provision of pre-apprenticeship programs, group training schemes and an industry specific traineeship/ apprenticeship program. In addition, there is a critical need to address the skill needs of the existing workforce. This will require government support for expanding recognition of prior learning services, delivering foundational skill programs for migrant workers and providing targeted upskilling programs to address skill gaps.

Circularity and sustainability are increasingly becoming integral principles in the textile, clothing and footwear industry as the sector works to reduce its environmental impact. These principles influence various aspects of production, design, and consumption, ultimately impacting skill needs across all stages of the supply chain. In terms of manufacturing the industry will require people with skills in sustainable production processes, the ability to manage closed loop manufacturing systems, waste management and circular supply chains, including take back programs and recycling systems.

# 7. Recommendations

**Recommendation 1:** *Map Textiles, Clothing and Footwear workforce skills and occupations.*

Conduct an industry-wide skills and occupational mapping project to identify current and future skills needed by the textiles, clothing and footwear industry. This proposed mapping project should:

- present a national TCF industry training profile
- provide a framework of current and emerging job roles and associated skills
- map vertical and lateral career pathways in the industry
- identify gaps in training provision
- identify TCF skills that are transferrable across job roles and sectors.

**Recommendation 2:** *Enhance the flexibility of the MST Textiles, Clothing and Footwear Training Package.*

Ongoing developments in the textiles, clothing and footwear industry drive the need for updates and improvements to the content and design of the training package. The results of the proposed skills and occupational mapping project will inform the development of the training package, taking into account industry demand for more flexible and accessible qualifications and the VET Qualification Reform design principles. The flexibility and accessibility of the package could be enhanced by reassessing the volume/complexity of existing qualifications and providing skill sets and micro-credentials that deliver in-demand skills.

**Recommendation 3***: Recognise the skills of the existing textiles, clothing and footwear workforce.*

1. Design a high integrity, cost and time-effective Recognition of Prior Learning (RPL) process to enable existing workers to gain national recognition for their skills.
2. Pilot the new RPL process across a range of TCF industry sectors, occupations and work settings.
3. Roll out the RPL process across the industry workforce.

**Recommendation 4:** *Build the skills of the existing textiles, clothing and footwear workforce.*

Consistent with the *National Workforce Strategy 2022-2027, Principle 3 Remove Barriers and Disincentives to Work*, design and roll out short, intensive and nationally recognised training programs, including any required training and assessment materials, for women, migrants, First Nations people and those located in regional, rural and remote communities to ensure that they have the foundation and technical skills to access employment in the industry.

1. Design and roll out short, flexible, nationally recognised skills upgrading programs for existing workers. These programs, including any necessary training and assessment materials, will equip existing workers with new in-demand skills focused on emerging technologies, updated materials, new work practices and industrial processes, and strengthened environmental regulations in the industry.
2. Examine the current and potential use of alternative training delivery methods, including workplace training, work-integrated learning, customisable enterprise-based training, multi-industry/sector qualifications, adult apprenticeships/traineeships, and online training,

to facilitate the rollout of nationally recognised training to existing workers and new entrants in the industry.

**Recommendation 5**: *Expand textiles, clothing and footwear apprenticeship / traineeship delivery.*

1. Develop and support the rollout of an industry-specific apprenticeship/traineeship model that incorporates pre-apprenticeship programs focused on the production and construction job roles needed to sustain Australian textiles, clothing and footwear manufacturing capabilities.
2. Pilot a range of group training initiatives to support the expansion of TCF apprenticeship/traineeship programs.

**Recommendation 6:** *Build sustainable capacity in critical occupations.*

Due to human capital deficiencies, shortages of skilled people in critical occupations can threaten organisational goals, strategic programs, supply chains, and businesses. The research will focus on defining critical occupations, identifying critical occupations in the industry, and designing ways to build sustainable capacity in critical occupations rapidly.

**Recommendation 7:** *Revise OSCA textiles, clothing and footwear occupations.*

Use the outcomes of the proposed skills and occupational mapping project to inform future discussions about the classification of textiles, clothing and footwear occupations under the Occupational Standard Classification of Australia.

**Recommendation 8**: *Strengthen textiles, clothing and footwear trainer and assessor capability.*

1. Build on the work currently being undertaken within the VET Workforce project to pilot a research project on attracting and retaining high-quality industry trainers and assessors.
2. Develop an industry trainer and assessor capability-building strategy.

**Recommendation 9:** *Support industry networks and partnerships.*

Establish pilot programs for industry-led Hubs as a strategic initiative to enhance the uptake and completion of qualifications, micro credentials and skill sets in key regions. The industry-led Hubs will engage with industry, government entities, RTOs, schools, community organisations and other key stakeholders to promote networking and support partnerships between industry and RTOs. The Hubs will focus on introducing innovative approaches to improve the uptake of the training package and provide new training initiatives for new entrants and existing workers across the industry.

**Recommendation 10**: *Attract new entrants to the textiles, clothing and footwear industry.*

1. Develop pathways linking VET in School, pre-apprenticeship and apprenticeship/traineeship programs aligned with industry skill needs.
2. Develop a campaign to drive awareness of the breadth of jobs in textiles, clothing and footwear manufacturing and increase the uptake of nationally recognised manufacturing qualifications amongst school leavers and other young people.

# 8. Implementing the recommendations

The ten recommendations outlined in this report provide a foundation for rebuilding the skill base of the TCF industry. Implementing these recommendations will require collaboration between various parties, including Skills Insight as a Jobs and Skills Council (JSC), employer and union bodies, the Department of Employment and Workplace Relations (DEWR), State and Territory Training Authorities, and Registered Training Organisations.

Careful planning is essential to determine which organisation is best suited to lead each recommendation, how the recommendations will be funded, and in what order they should be implemented. The following chart is designed to provide initial guidance on when each recommendation should be acted upon and the parties responsible for implementation. It is intended that this will inform the development of an implementation plan, which will be created collaboratively by Skills Insight and the relevant TCF employer and union bodies.

| Recommendation | Actioning the recommendation | Responsibility for implementation |
|---|---|---|
| Recommendation 1 Map textiles, clothing and footwear workforce skills and occupations | This work to commence as soon as possible | Facilitated by the JSC through a DEWR approved funded activity |
| Recommendation 2: Enhance the flexibility of the MST Textiles, Clothing and Footwear Training Package | This work to follow and be informed by the outcomes of the mapping of TCF skills and occupations [Recommendation 1] | Facilitated by the JSC through a DEWR approved funded activity |
| Recommendation 3: Recognise the skills of the existing textiles, clothing and footwear workforce | This work to be informed by the outcomes of current government initiatives relating to Tertiary Harmonisation and the AQF Standards on Certification Pathways | The current settings and funding model of the VET sector make this recommendation impossible without additional funding pathways for this work. TCF employer and union bodies, with support from the JSC will need to advocate for TCF to be a priority industry for pilots and testing of Recognition of Current Competency (RCC) programs |
| Recommendation 4: Build the skills of the existing textiles, clothing and footwear workforce | This work to be commenced in conjunction with the work in Recommendation 2 | A plan to be developed, through a DEWR approved funded activity, to outline the approach[s] to building the skills of the existing TCF workforce and the respective roles of RTOs, TCF employer and union bodies and state governments |
| Recommendation 5 Expand textiles, clothing and footwear apprenticeship / traineeship delivery | This work requires support from State and Territory Training Authorities, union and employer bodies and government agencies with responsibility for labour / industry policy at Commonwealth, State and Territory level | A study exploring potential apprenticeship model[s] to be facilitated by the JSC through a DEWR approved funded activity initiated under Recommendation 2 |

| | | |
|---|---|---|
| Recommendation 6: Build sustainable capacity in critical occupations | This work requires the support of TCF employer and union bodies | Discussions between TCF employer and union bodies on the priority and approach to building capacity in critical TCF occupations |
| Recommendation 7: Revise OSCA textiles, clothing and footwear occupations | This work should be informed by the outcomes of the mapping of TCF skills and occupations [Recommendation 1] | This work to be driven by the relevant TCF employer and union bodies, with facilitation and technical support provided by the JSC |
| Recommendation 8: Build textiles, clothing and footwear trainer and assessor capability | This work should be considered after the completion of the current VET Workforce Blueprint Project | JSC to facilitate TCF employer, union and RTO stakeholder response to VET Workforce Blueprint Project |
| Recommendation 9: Support industry hubs | This work to be prioritised and led by employer, union and RTO stakeholders | If prioritised by TCF employers, unions and RTO stakeholders, they will need to investigate options for further development of the hub concept and seek government support for them |
| Recommendation 10: Attract new entrants to the textiles, clothing and footwear industry | This work to be prioritised and led by employer, union and RTO stakeholders. It should be informed by the outcomes of the mapping of TCF skills and occupations [Recommendation 1] | TCF employer, union and RTO stakeholder to develop strategies for attraction after completion of the mapping of TCF skills and occupations [Recommendation 1] and completion of the existing JSC project on attraction and retention strategies |

# 9. Lessons learned

The three key lessons learned through the conduct of this Skills Insight project are:

- gathering accurate, high-quality, and up-to-date data is essential for meaningful insights. The analysis of this data helps to identify trends, patterns, and areas that need improvement.
- engaging with industry stakeholders is critical in identifying the skill gaps and emerging trends that can inform the project.
- the process of collecting data or conducting interviews can reveal unexpected findings. Being open to changing the direction or focus of the project based on new insights is important.

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# Appendices

# Appendix 1 – Participants in consultations

1. Albertini – Northern Territory
2. Assembled Threads – Victoria
3. Australian College of Training – Victoria
4. Australian Fashion Council – New South Wales
5. AWI Woolmark – New South Wales
6. Bendigo Kangan Institute – Victoria
7. Canberra Institute of Technology – Australian Capital Territory
8. Chamber of Commerce and Industry – Western Australia
9. Citizen Wolf – New South Wales
10. City Beach – Queensland
11. Clothing The Gaps – Victoria
12. Construction, Forestry and Maritime Employees Union, Manufacturing Division – Victoria
13. Department of Justice – Western Australia
14. Department of Training and Workforce Development – Western Australia
15. Drycleaning Institute of Australia – Victoria
16. Empire Upholstery – Western Australia
17. Food Fibre and Timber Industries Training Council – Western Australia
18. George Wu Pty Ltd – Queensland
19. Godfrey Hirst – Victoria
20. Good Sammy – Western Australia
21. Gouge Linen and Garment Services – Victoria
22. Hellweg Australia – Victoria
23. Holmesglen Institute – Victoria
24. House of Clare – Queensland
25. Humphrey Law – Victoria
26. Impact Trim - Western Australia
27. Integral T – Victoria
28. Kent Saddlery – Queensland
29. Kirrikin – New South Wales
30. Kristin Magrit – Western Australia
31. Laundry Association of Australia – Western Australia

32. LDCT Laundry Dry Cleaning Training – New South Wales
33. Loop Upcycling – Western Australia
34. Manufacturing Skills Australia – New South Wales
35. Manufacturing Skills Queensland – Queensland
36. Melbourne Fashion Hub – Victoria
37. Michell Wool Pty Ltd – Victoria
38. Namoi Cotton Australia – Queensland
39. Nelson Molloy – Queensland
40. Neweys Drive Thru Cleaners – New South Wales
41. North Metropolitan TAFE – Western Australia
42. NSW TAFE – New South Wales
43. One Fell Swoop – Western Australia
44. Philosophy Australia – New South Wales
45. Potter and Co. – Western Australia
46. RB Patterns – Victoria
47. R.M. Williams – South Australia
48. RMIT – Victoria
49. RSEA Safety – Victoria
50. Saddlers' and Harness Makers Association of Australia – Victoria
51. Silver Fleece – South Australia
52. South Metropolitan TAFE – Western Australia
53. South Regional TAFE – Western Australia
54. Specialised Textiles Association – Victoria
55. Sphinx Australia – New South Wales
56. Stewart Heaton Clothing – Victoria
57. Tactile Learning Centre Pty Ltd – Queensland
58. TAFE Queensland – Queensland
59. TAFE SA – South Australia
60. Textile Clothing Footwear Resource Centre of WA Inc – Western Australia
61. Textile Lab – Western Australia
62. The Social Outfit – New South Wales
63. Tubie Fun – Queensland
64. Urvara Pty Ltd – Western Australia
65. Whitman Clothing – Western Australia

# Appendix 2 – Respondents to industry and RTO surveys

## Industry survey

Birds of Bikes / Ethical Edge Collective – Queensland

CFMEU – National

City Beach – Queensland

Drycleaning Institute of Australia – Victoria

Evolve Australia Pty Ltd – Queensland

Fox Flags – Queensland

George Wu – Queensland

Godfrey Hirst Pty Ltd – Victoria

Hellweg Australia – Victoria

House of Clare – Queensland

Kent Saddlery – Queensland

Knobby – Queensland

Lighthouse Furnishings – Queensland

Merino Country Australia – Queensland

Nelson Molloy – Queensland

Neweys Drive Thru Cleaners – New South Wales

Nic Wilde Textile Designs – Victoria

One Little Day Pty Ltd – Queensland

Sinerji – Queensland

Struddys Apparel – Queensland

Sylvia Sportswear Pty Ltd – Queensland

Tubie Fun – Queensland

Plus, seven unidentified respondents

## RTO survey

Bendigo Kangan Institute – Victoria

TAFE Queensland

TAFE South Australia

# Appendix 3 – Members of subject matter expert working group [SMEWG]

Ana Drougas – Specialised Textiles Association

Catherine Cluning – Drycleaning Institute of Australia

David Jeffries – Michell Wool Pty Ltd

Edwina Walsh – Assembled Threads

Glenn Dezen – R.M. Williams

Jenny Kruschel – CFMEU Manufacturing Division

Kerryn Wollington – Laundry Association of Australia

Lisa Pillar – South Metropolitan TAFE

Samantha Delgos – Australian Fashion Council

Sandra Priddle – Godfrey Hirst

Toni Patricia Stalls – Integral-T

Tracey Kirwan – Chisholm Institute

Wendy Peterson – Chisholm Institute

ForestWorks:

Belinda Tierney

Rob Stowell

Tim Cleary

# Appendix 4 – Schedule of SMEWG meetings

SMEWG meetings were conducted on:

15 October 2024

4 February 2025

27 February 2025

4 April 2025

# Appendix 5 – Training Provider Discussion Paper

**Date:** December 10 – 2024

**Time:** 1.00-3.00pm EST

**Facilitators:** Paul Cavicchia and Tamara Speldewinde

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**Introduction**

Workforce skills levels are important to making decisions about training. In an NCVER study on reasons for training, the report indicated that organisations with high levels of workforce skills are likely to use vocational qualifications to meet standards or to enhance competitiveness.9 Whereas organisations with low skill levels are likely to require vocational qualifications to gain skills not developed through their own internal training.

According to the NCVER report[10], vocational training is primarily driven by job necessities, skill improvement, and the prospect of receiving a pay raise. Accordingly, these qualifications are primarily used to provide skills for certain jobs and are used to comply with external regulations (such as licensing requirements) or internal regulations (such as the provisions of industrial agreements) or professional or industry standards.

**Background**

The Textile Clothing and Footwear (TCF) industry is undergoing a significant post-pandemic transformation, changing the nature of workforce occupations and skills.

The 2024 Skills Insight Workforce Plan[11] revealed opportunities and challenges impacting the TCF industry. Increasing consumer interest in locally made, ethical and sustainable products is providing opportunities for businesses to focus on quality craftsmanship and strong technical skills, which may shift the skills needed of the current and future workforce. The growth in textile repair, reuse and recycling is also predicted to have a significant impact on the industry, including the development of new skills in eco-friendly production and design.

This research project is collecting further information about the current TCF workforce and whether the qualifications in the national Textiles, Clothing and Footwear MST Training Package, meet workforce needs. Forestworks has been consulting with industry stakeholders, training and education providers, and unions to make connections and gather insights.

**Overview**

This discussion paper is structured into five thematic focus areas:

**Focus Area 1:** Training Provider Challenges

**Focus Area 2**: Attracting younger people and new entrants for the current and Next-Generation workforce

**Focus Area 3:** Developing Training Programs for Future-Proofing Skills

**Focus Area 4:** Recognising Portable Skills for Mobility

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[9] Smith, Oczkowski, Hill, 2009. Reasons for Training: Why Australian employers train their workers. NCVER
[10] Ibid
[11] https://skillsinsight.com.au/workforce-plan/

**Focus Area 5:** Training challenges

**Each Section consists of two parts:**

- **Background** – Additional context and information on the section topic.
- **Discussions Points** – key issues and questions.

**Forum Participants include:**

University, TAFE and RTO organisations with an MST Scope of registration.

## Focus Area 1: Training provider challenges

Training providers in the TCF industry, are a mix of University, TAFE and private Registered Training Organisations (RTOs). They face a range of challenges when it comes to delivering effective training programs to meet the reasons above.

These challenges include:

- the geographical dispersion of learners
- low student-to-trainer ratios
- high equipment and expertise costs
- insufficient government funding for industry-relevant training
- a preference for short courses and micro-credentials
- inadequate funding structures for RTOs operating in niche markets
- an increasing demand for non-accredited training that incurs high compliance costs
- onerous level of course registration compliance, resourcing, and cost to maintain qualifications on a scope of registration

Broad consultations have indicated that it is these challenges which exacerbate low enrolments that trigger thin markets.

**Training participation**

Under the National Skills agreement[12] is a 5-year joint agreement between the commonwealth, states and territories to strengthen the vocational education and training (VRT) sector.

The agreement aims to deliver a future workforce by providing hundreds of thousands of Australians access to high-quality training. This initiative promotes the Australian Government belief that strong participation in vocational training is essential for meeting Australia's skills needs now and into the future.

However, there are barriers to access to training and participation, which include:

- A lack of support and encouragement from employers hinders training engagement.
- The absence of flexible working arrangements creates obstacles for individuals to participate in training programs.

[12] https://www.dewr.gov.au/skills-reform/national-skills-agreement

- Limited access to training opportunities further complicates the training process for learners.
- The absence of pay incentives for completing training or acquiring higher qualifications discourages individuals from engaging in further professional development.
- A lack of training options that are online, outside of work hours, distance and remote function as a disincentive for individuals to participate in training programs.
- Apprenticeships and traineeship models and regulation.
- Government funding is primarily directed toward TAFE, leaving private RTOs, especially those serving small, regional, and remote industries, without financial assistance.
- Government policies that provide free TAFE training courses, exclusively accessible through TAFE, negatively affect private RTOs by drawing away potential enrolments.
- Trainers employed by private RTOs earn money only when they provide training, with their income contingent on the number of enrolled students. Consultations indicate that financial instability presents a challenge to private RTOs.
- Current funding models do not offer incentives for TAFE and private RTOs to provide training services to small, regional, and remote industries, making it difficult for them to maintain high-quality training courses.

These challenges have a significant impact on the industry, leading to shortage of qualified and accredited workers, hindering the growth and future development of the industry.

> ### Discussion Points
>
> 1. Are these the only challenges faced by training providers?
> 2. What other barriers and challenges exist for training providers that needs to be noted in the DEWR report?

## Focus area 2: Attracting younger people and new entrants for the current and Next-Generation workforce

#### Focus on the Secondary School landscape and attracting new entrants

To ensure a sustainable future for the TCF industry, it is vital to attract, recruit, train, and equip a qualified and competent young workforce. This will require the implementation of strategies and funding support that addresses the existing shortage of skilled workers across all sectors not just in fashion, to encourage a diverse pool of talented individuals to join the industry.

Industry consultations and discussions have revealed that not enough is being done in the secondary school landscape to promote all sectors TCF outside fashion careers as a career path.

Feedback indicates that new workers or entrants directly entering the sector from school are uncommon. There is a consensus that younger cohorts and new entrants are the future and a priority for TCF manufacturing. The current state of play is that TCF has an ageing workforce with people aged above 60-years to as old as 84 years of age.

Industry feedback indicates that students do not choose production careers as a choice, and lack visibility, awareness and knowledge of all TCF career options. Industry consultations have also indicated that training providers do not have a focus on production skills such as machinists, sewers, pattern makers, cutters and textile mechanics. The heavy focus from training providers sits with fashion and fashion design and the marketing side of fashion. Consultations with manufacturers do not represent this as a priority.

Apprenticeships have been indicated by industry as being a positive solution to futureproofing industry, however this requires significant campaigns and communication by industry to attract people to undertake an apprenticeship and modelling needs to focus on production needs.

### Discussion Points

1. How do we promote the industry to young people? What can training providers do to assist industry promote new entrants?
2. There is the issue that the Australian schooling system is different with differing curriculum between states and territories. Does this effect attracting younger cohorts into the TCF career path? What strategies and campaigns need to be undertaken to harmonise these jurisdictional differences?
3. What actions can be taken to provide information and resources to students, parents, and teachers about career pathways in the industry?

**Retention of skilled workers and new entrants**

- There is a lack of succession and workforce development planning, a disconnect between expectations and reality of jobs.
- Visibility as a career choice is low as jobs are limited.
- There is pressure to increase wages as other manufacturing businesses are more attractive.
- There is a lot of competition and challenges to finding and hiring new staff with other industries and manufacturers.

### Discussion Points

1. Is industry willing to pool their resources to coordinate with training providers to attract new entrants? How do we bring industry and training providers together to agree to a pathway forward and then stick to the plan?
2. What role can all stakeholders, including employers, unions, schools and training organisations play in promoting the industry to young people and new entrants?
3. How do we establish partnerships between industry stakeholders to create opportunities for school-based apprenticeships, industry tours, and student-based projects?

## Focus Area 3: Developing training programs for future proofing skills

To maintain a competent and adaptable workforce in the industry, it is essential to develop accessible and flexible professional development training programs that are tailored to meet the skill requirements generated by technological developments and industry innovation. Supporting workers in staying abreast of the latest industry developments requires targeted investments in training programs. Targeted training programs directed towards enhancing employee skills and behaviours will assist TCF employers to achieve their broader business goals.

Employees will gain more expertise and boost their value to perform their current job or prepare to take on a more advanced job role. Targeted training sends a positive message to employees that TCF employers care about their growth and welfare.

### Discussion Points

1. What are the emerging themes, technologies, and new industry projects that are shaping the future of the industry?
2. How are training providers working with the TCF industry to target training programs for ongoing learning and growth?

#### Ageing Workforce

The ageing workforce is one of the biggest challenges TCF manufacturers are facing. Our preliminary desktop study[13] indicates that 47% of the workforce are aged between 50 and 79 years of age. Retirement projections sit between the next five to 10 years to be approximately 10,000 workers. Employment projections for the TCF industry indicate a growing workforce demand over the next ten years, driven by the macroeconomic and labour market outlook. This growth equates to over 6,000 additional jobs over the next ten years[14].

These projections indicate that a succession plan is critical for future proofing the industry. According to Deloitte's Global trends report[15], older workers represent "a largely untapped opportunity." The report suggests that organisations can benefit from older workers' serving as mentors, coaches, or experts[16]. This is because these kinds of roles allow older workers to 'pass the baton' to younger generations.

### Discussion Points

1. Do training providers support the view that older workers represent an untapped market opportunity? If so, how is the training sector reskilling the ageing workforce to stay longer in the TCF industry?
2. If younger people are not filling the places retirees leave, is there any point to having production skillsets in the MST training package and qualifications?

[13] https://skillsinsight.com.au/project/textiles-clothing-and-footwear-workforce-insights/
[14] Ibid
[15] https://www.deloitte.com/au/en/services/consulting/perspectives/deloitte-global-human-capital-trends-2023.html
[16] Ibid

### Apprenticeships

Apprenticeships address skills shortages and develop careers across core parts of a business and a key strategy in futureproofing Australia's workforce. Yet broad consultations have indicated a lack of apprenticeships being undertaken. Many businesses outsource their production, and legislation prohibits putting on a subcontractor as an apprentice. There are issues that there are no apprenticeship schemes that tailor to each of the sectors of the industry.

This issue is also compounded by thin markets as not every state can offer suitable training. Insight indicates that many Registered Training Organisations fast track learners through qualifications and do not take the time to embed the necessary skills.

#### Discussion Points

1. Employers are seeking solutions that incentivise apprenticeship uptake. What advise can the Training sector offer?
2. What can training providers do to encourage TCF as an attractive apprenticeship/traineeship?
3. Should a JSC study be undertaken to review the TCF apprenticeship model to align it with current and future needs?

### Proactive planning and skills forecasting

Skills forecasts reviewed and conducted regularly is a key way to identify emerging needs. This requires industry to address job role requirements through a collaboration with ANZSCO, skills occupation lists, government and funding support to make skills forecasts meaningful for the sector. The crucial element for skills forecasting sits with accurately assessing the current and future capacity of the workforce, especially considering the upcoming retirement of ageing workers.

There is a need for a clear understanding of training needs and effective communication with training providers to ensure proactive strategies that address emerging needs effectively. Feedback from consultations have indicated a non-alignment with ANSZCO categories and TCF workplace job roles.

#### Discussion Points

1. How are training providers pro-actively skills forecasting job roles for ANZSCO codes and classifications?
2. What recommendations can be made to Skills Insight for future ANSZCO classifications through the Stakeholder Engagement mangers with regards to the TCF sector?

## Focus Area 4: Recognising portable skills for mobility

### Portability of skills

Within the industry, portability refers to the transferability of skills within the workplace. The ability to apply acquired skills in different areas within the workplace is considered important for workforce shortages.

**Skills recognition and skills passports**

The concept of skills recognition, particularly within the workplace emphasises the need to enhance the recognition of critical skills and find effective ways to introduce them. In the instance of job losses without proper recognition of employees' skills, particularly during crises such as the closure of sectors of the industry, sees skills passports as crucial. Addressing these issues promptly and retroactively is priority.

**Micro-credentials and qualifications**

The potential use of stackable micro-credentials to trigger qualifications, industry consultations support that this should be explored effectively. Feedback from manufacturers indicate that micro-credentials should not hinder individuals from obtaining proper qualifications and recognition for their skills, rather facilitate the RPL process.

When considering micro-credentialing or skill sets, the importance of ensuring their stackability means that micro-credentials can be combined to eventually lead to a formal national qualification and or evidence in a formal RPL process.

### Discussion Points

1. Do training providers see stackable micro credentials as a barrier to formal accredited qualifications?
2. How are training providers supporting the concept of stackable micro-credentials, skills passports and RPL processes?

## Focus Area 5: Training and training package challenges

Training and education meet the ever-changing needs of industry skills and knowledge. One of the most crucial benefits of training is improved employee performance. Training and development mean that employees get to learn something new or refine their existing skills. This way they can grow within the organisation, align their goals and invest their time in areas where they feel they need more work. Organisations can invest in their employees to encourage them to work more productively and effectively. This leads to enhanced performance with better productivity.

Training is an activity to improve the ability and performance of employees in the performing of their duties, through the improvement of specific skills, attitudes and behaviour related to work[17]. Training activities must be well designed in such a way that they really provide benefits in accordance with the goals that employees should achieve. Well-designed job training, as well as its successful implementation, will improve the quality of employees' work and having more local people qualified to join the Australian workforce, reduces dependence on importing talent from outside the industry, or from overseas.

Our industry consultations have stressed the importance of industry-specific skill recognition and integration within the broader VET framework. This will ensure that training programs adequately address the sector's requirements and provide opportunities for employees to acquire recognised qualifications. As the industry continues to evolve, it is crucial to develop advanced technology skills (e.g. CAD, new and innovative technologies), basic digital proficiency (e.g., word processing,

[17] Geminastiti Sakkira, Syarifuddin Dollaha, Jamaluddin Ahmadb, E-Learning in COVID-19 Situation: Students' Perception, in: EduLine: Journal of Education and Learning Innovation, Vol. 1 No. 1, 2021

computer operations, software applications), and digital data management, analysis, and application abilities.

Any lack of access to education and training opportunities will lead employees to have lower levels of literacy, numeracy, and technical skills, which can limit their access to employment opportunities.

Lack of access to vocational training, apprenticeships/traineeships, and suitable training options, as well as a lack of mentors, knowledge of the industry, and training resources, have been highlighted by industry manufacturers and employers as significant barriers.

**Thin Markets - Training**

The dispersed and regional jurisdictional nature of the industry has resulted in a thin training market, which makes it difficult for training providers to operate profitably. Centralised TAFEs do not operate in all areas close to the industry or deliver industry-specific training, making it harder for regional employees to access training courses. The number of students to trainers is low in the industry, making it difficult for RTOs to conduct on-site training and assessment for small groups of students.

As a result, the industry relies on private training providers servicing technical skills in the thin market. These however are few in number and even fewer for dry cleaning and laundry operations.

**Integrating existing training with industry priorities**

Concerns were raised regarding the limited access to publicly funded training in the TCF sector. Consultations identified a missing link between workplace training and the VET sector, as well as the lack of flexibility within the VET system to cater to the unique needs and scale of the industry.

Manufacturers in fashion, textiles and apparel indicate that there is far too much emphasis on Fashion and Fashion design and not enough on production and construction skills. There are sever shortages of sewers, sewing machinists, pattern makers and garment construction workers. Industry feedback is that Australia simply do not need a high number of fashion design graduates.

### Discussion Point

1. Why is there a focus by training providers on fashion design courses and not production and construction courses?

Industry insight indicates that state governments focus is not aligned with its needs in terms of skills, knowledge and funding and not aligned to Federal initiatives. The focus of state-owned TAFEs are not aligned with workplace requirements. This lack of alignment hampers employers' efforts to provide continuous training to upskill their employees while also retaining them in the sector.

The practicality of changing the industry's nature to fit the existing training system is unrealistic. Instead, it is crucial for the VET system to adapt and align itself with the sector's needs. Recognising the value of workplace training delivered, which is delivered by subject matter experts, workplace trainers, and assessors, is essential in meeting the sector's demands.

It is necessary to overcome the limitations of the VET system. One option suggested from our broad consultation process, is through the establishment of partnerships that assure quality without being restricted to physical presence within the TAFE system. Collaboration amongst stakeholders is key

to building strong linkages between training activities, funding access, and desired outcomes, ensuring that the sector's objectives are effectively met. It is crucial to note that any workplace training should not exclude it from accessing publicly funded training.

### Discussion Points

1. Do training providers have a clear understanding of what the TCF MST training landscape will look like for Australia in the near future? and whether it is possible to forecast the training package requirements and communicate them to government and industry?
2. Do training providers believe that the current MST training package is fit for purpose?
3. What are the skills and knowledge gaps existing within the MST qualifications?

**Trainers and Assessors**

Broad consultations with TAFE have indicated a lack of TCF industry trainers and assessors, along with a lack of training focus to develop technical skills and capabilities of their workforce on a broader scale. There is a severe shortage of qualified trainers and assessors and a lack of a trainers' network, hinders the capacity of workplace and RTO employed trainers and assessors to effectively meet the demands of industry-specific training.

### Discussion Points

1. What strategies can be employed to address Thin Markets? What recommendations can be made to the government?
2. How do training providers overcome the challenges of Teacher shortages? Are we able to access industry trainers into the TAE model?
3. What innovative approaches can be implemented to nurture a new generation of skilled workplace trainers and assessors?
4. How can Government fund current and emerging workplace trainers and assessors to undertake and complete the Certificate IV in Training and Assessment?
5. What framework can be developed to facilitate effective partnerships between RTOs and workplace trainers and assessors? What should be included in the partnership agreements?

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# Appendix 6 – Participants in training provider workshop

1. Australian College of Training
2. Canberra Institute of Technology
3. Department of Training and Workforce Development, WA
4. Food Fibre and Timber Industries Training Council, WA
5. Holmesglen Institute
6. LDC Group Asia Pacific Pty Ltd
7. North Metropolitan TAFE, WA
8. NSW TAFE
9. RMIT
10. South Metropolitan TAFE, WA
11. Tactile Learning Centre Pty Ltd
12. TAFE Queensland
13. TAFE SA

# Appendix 7 – Textile Clothing and Footwear – Stakeholder 'map'

## Major TCF Employers

| TCF sector | Business name |
|---|---|
| Cut and Sewn Textile Product Manufacturing | Assembled Threads |
| | Hunter Douglas |
| Carpet and Textile Floor Covering Manufacturing | Beaulieu |
| | Interface Aust Pty Ltd |
| | Premium Floors Australia |
| | Quest Carpets |
| | Victoria Carpets |
| Synthetic and Natural Textile Manufacturing | Australian Textile |
| | Belgotex Fabrics Pty Ltd |
| | Melco Fabrics |
| | Michell Wool |
| | Queensland Hosiery Mill |
| | Victoria Wool Processors |
| | Waverley Mills |
| Apparel Manufacturing | ABMT Apparel |
| | Akubra Hats Pty Ltd |
| | Australian Defence Apparel |
| | AussieBum |
| | Citizen Wolf |
| | Cue |
| | Driza-Bone |
| | Fella Hamilton |
| | Hellweg Australia |
| | Newcastle Hats |
| | Qualitops |
| | R.M. Williams Pty Ltd |
| | Struddy's |
| | Tuffa Workwear |
| Knitted Product Manufacturing | Belvedere Hosiery Mills Pty Ltd |
| | Calcoup Knitwear Pty Ltd |
| | Humphrey Law |
| | Silver Fleece Pty Ltd |

| | |
|---|---|
| Leather Manufacturing | Al Topper |
| | Loop Leather Co. |
| | Schaffer |
| | Teys Australia |
| Footwear Production | Baxter & Co Pty Ltd |
| | Blundstone Australia |
| | R.M. Williams Pty Ltd |
| | Redback Boot Company Pty Ltd |
| | Steel Blue |
| Dry-Cleaning and Laundry Services | Adamantem Capital Group |
| | Alsco |
| | South Pacific Laundry |
| Clothing and Footwear Repairs and Alterations | Aramilo Pty Ltd |
| | Looksmart Alterations |
| | Minit Australia |

## Other stakeholders

### Industry associations

| | |
|---|---|
| National | Australian Council of Wool Exporters and Processors |
| | Australian Fashion Designers Association |
| | Australian Hide, Skin and Leather Exporters Association |
| | Australian Made Campaign Limited |
| | Australian Wool Innovation |
| | Blind Manufacturers' Association of Australia |
| | Carpet Institute of Australia Ltd |
| | Cotton Australia |
| | Council of Textile & Fashion Industries of Australia |
| | Footwear Manufacturers Association of Australia Inc |
| | Saddlers and Harness Makers Association of Australia |
| | Technical Textiles and Non-Woven Association |
| | The Australian Cotton Ginners' Association |
| | The Australian Fashion Council |
| | The Australian Wool Growers' Association |
| | The Drycleaning Institute of Australia |
| | The Laundry Association Australia |
| | The Millinery Association of Australia |
| | The Specialised Textiles Association |
| Western Australia | Textile Clothing Footwear Resource Centre of Western Australia |

| | |
|---|---|
| **Industry Training Councils** | |
| Western Australia | Food, Fibre and Timber Industries Training Council |
| **Sustainability organisations** | |
| | Circular Economy Business Innovation Centre |
| | Ethical Clothing Australia |
| | Monash Sustainable Development Institute |
| **Trade unions and workers' organisations** | |
| | Clean Clothes Campaign |
| | Textile Clothing & Footwear, CFMEU Manufacturing Division |
| | Working Women's Centre Australia |
| **Registered Training Organisations** | |
| Australian Capital Territory | Canberra Institute of Technology |
| | Catholic Archdiocese of Canberra and Goulburn Education Limited |
| New South Wales | Innovative Learning Solutions Pty Ltd |
| | Technical and Further Education Commission |
| | The LDC Group Asia Pacific Pty Ltd |
| | Young Rabbit Pty Ltd |
| Queensland | Aspire to Succeed Pty Ltd |
| | Brighton Pacific Pty. Ltd |
| | Charlton Brown Pty Ltd |
| | Christian Community Ministries Ltd |
| | Civil Safety Pty Ltd |
| | Learnivation |
| | Lowood State High School |
| | Precision Training Australia Pty Ltd |
| | Sunnybank State High School |
| | Tactile Training Pty Ltd |
| | TAFE Queensland |
| South Australia | TAFE SA |
| Tasmania | TasTAFE |
| Victoria | Australian Institute of Fashion Design Pty Ltd |
| | Box Hill Institute |
| | Bendigo Kangan TAFE |
| | Elisabeth Murdoch College |
| | Holmesglen Institute |
| | Ripponlea Institute Pty Ltd |

| | |
|---|---|
| | RMIT |
| | Stanborough Wemyss Contracting Pty Ltd |
| | VICSEG New Futures |
| | Virtu Design Institute Pty Limited |
| Western Australia | Australian College of Training Pty Ltd |
| | Department of Training and Workforce Development |
| | North Metropolitan TAFE |
| | South Metropolitan TAFE |
| | South Regional TAFE |