

Demand and Supply of Sewing Machinists in Australia



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Contents

Executive summary	4
1. Purpose	7
2. Defining the Sewing Machinist workforce.....	8
3. Method and limitations	9
4. Current workforce and industry context	11
4.1 Workforce profile.....	11
4.2 Geographic distribution.....	12
4.3 Industry distribution	13
5. Demand for Sewing Machinists	14
6. Supply of Sewing Machinists.....	20
6.1 Sources of supply	20
6.2 VET pathways for entry-level Sewing Machinists.....	20
6.2.1 MSTSS00015 Industrial Sewing Skill Set.....	20
6.2.2 MST20722 Certificate II in Apparel, Fashion and Textiles	25
6.3 Related VET pathways	27
6.3.1 MSF30722 Certificate III in Upholstery. This qualification provides entry-level training for workers who select, cut, sew and fit upholstery materials.....	27
6.3.3 Certificate II in Leather Production (MST20319) and Certificate III in Leather Production (MST30519).....	29
6.4 Overview of the supply of Sewing Machinists	30
7. Key findings and implications	32
7.1 Key findings.....	32
7.2 Implications for entry-level pathways for Sewing Machinists	33
References.....	35

Executive summary

This report examines the demand for and supply of Sewing Machinists in Australia, with a particular focus on the capacity of the current workforce, the vocational education and training (VET) system and other sources of labour supply to meet employer recruitment and workforce replacement needs.

Sewing Machinists comprise a relatively small, predominantly female and ageing workforce. Available official estimates place the workforce between approximately 6,000 and 8,600 workers, although differences between ANZSCO and OSCA classifications and reference periods mean these estimates should not be directly compared as a time series. The current OSCA profile reports a median age of 52 years, while workforce age data show a particularly large concentration of workers aged 45 years and over. Victoria accounts for around one-third of employment, followed by New South Wales and Queensland. Manufacturing remains the main employing industry, although industrial sewing skills are also used across textile products, furnishings, leather goods, canvas fabrication, repairs and alterations, upholstery, automotive and marine trimming and other specialist applications.

Demand for Sewing Machinists has been shaped by the long-term contraction of Australian clothing and footwear manufacturing. Employment in the occupation has declined substantially over the past two decades and demand is modest in economy-wide terms. However, this decline has also substantially reduced the pool of experienced workers available to employers. As a result, relatively modest levels of recruitment can create significant difficulties for individual businesses seeking Sewing Machinists, especially experienced workers.

Online vacancy data provides evidence of sustained recruitment demand. Following a long-term decline, the annualised Internet Vacancy Index (IVI) measure for Sewing Machinist job advertisements increased substantially after 2020, reaching 1,521 in 2022 and remaining above 1,000 in each year from 2021 to 2025, including approximately 1,167 in 2025. Between 2018 and 2025, the annualised IVI measure for Sewing Machinist job advertisements averaged approximately 1,060 per year, substantially higher than Vehicle Body Builders and Trimmers (409), Upholsterers (239) and Canvas and Leather Goods Makers (36). Despite this, Sewing Machinists are not currently classified by Jobs and Skills Australia as being in shortage, whereas Upholsterers and Vehicle Trimmers are recognised as experiencing skill shortages.

The supply of Sewing Machinists extends beyond Vocational Education and Training (VET) graduates. It includes current workers who change employers or seek additional work; former machinists returning to work; self-employed workers; subcontractors; workers with overseas experience; adults, especially women, seeking a career change or return to paid employment; people transitioning from alterations, clothing trades, upholstery, leatherwork, canvas fabrication, textile production, automotive trimming

or marine trimming; and recent migrants and refugees seeking employment, who may or may not have machinist skills.

Mainstream skilled migration is a limited and unreliable source of Sewing Machinists. The occupation is not included in the Core Skills Occupation List and is generally unavailable through the main employer-sponsored, points-tested and regional skilled-migration pathways. At this time, overseas recruitment cannot be seen as a mechanism for replenishing the Sewing Machinist workforce.

The VET system is also not currently producing a consistent flow of new Sewing Machinists at a scale sufficient to meet recruitment and replacement needs. The MSTSS00015 Industrial Sewing Skill Set, the most directly relevant short entry-level program, recorded only about 275 enrolments between 2021 and 2025, with delivery heavily concentrated in South Australia. Approximately 45 completions were recorded over the same period, although limitations in aggregate National Centre for Vocational Education Research (NCVER) data mean this should not be interpreted as a formal completion rate.

The MST20722 Certificate II in Apparel, Fashion and Textiles has a much larger enrolment base, rising from 1,465 in 2024 to 2,095 in 2025. However, it cannot be regarded as a direct pipeline for Sewing Machinists, as it comprises multiple streams and is predominantly undertaken by learners aged 15–19. Most importantly, only 195 learners in 2024 and 115 in 2025 were enrolled in the key industrial sewing unit, MSTTX2014 Perform industrial sewing on textile products. Related qualifications in upholstery, automotive and marine trimming, and leather production also develop potentially transferable industrial sewing skills, but their graduates cannot automatically be counted toward the Sewing Machinist supply.

Taken together, the evidence points to a structural gap in the mechanisms available to sustain and replenish Australia's Sewing Machinist workforce. The annualised IVI measure for Sewing Machinist job advertisements records more than 1,000 online advertisements annually since 2020, against a workforce of approximately 6,000–8,000 people. Movement between employers within the existing workforce is unlikely to meet all recruitment demand; mainstream skilled migration offers limited access to overseas Sewing Machinists; and the VET system is not producing a steady, sufficiently targeted stream of new entrants. These pressures are compounded by an ageing workforce and the associated risk of losing specialist skills and workplace knowledge as experienced machinists retire.

This report recommends designing and testing a coordinated workforce development initiative to establish a sustained pipeline of new Sewing Machinists over an initial five-year period. The scale and location of training should be informed by employer demand, workforce replacement requirements, and industry capacity to employ and support new entrants, with particular attention to Victoria, New South Wales, Queensland, South Australia, and Western Australia.

Such an initiative should combine foundational industrial sewing training with structured workplace learning or supervised production practice, and provide pathways into specialist applications, including garment production, leather, canvas, upholstery, and automotive and marine trimming. It should also provide bridging or upskilling opportunities for workers with related or overseas skills, support participation by women, mature-age workers, migrants and refugees, while creating clearer pathways for younger entrants, and involve employers, RTOs, social enterprises and industry bodies in program design and delivery. Outcomes should be measured not only by enrolments and completions but also by work placements, employment, retention, and progression into skilled industrial sewing roles.

The central finding of this report is that the challenge is not simply delivering more training for Sewing Machinists. It is the need to establish a sustained, supported transition from training to productive employment, capable of renewing an ageing workforce while developing the specialist industrial sewing capability required by Australian companies.

1. Purpose

This report examines the demand for and supply of Sewing Machinists in Australia.

It describes the Sewing Machinist workforce, including its size, age, gender, location and main industries. It examines demand using job advertisements, employment trends, other workforce data, and evidence from industry sources and consultations.

The report reviews the main sources of supply of Sewing Machinists, with a particular focus on VET qualifications and skill sets. It examines the Industrial Sewing Skill Set, the Certificate II in Apparel, Fashion and Textiles, and related qualifications in upholstery, automotive and marine trimming, and leather production.

The report identifies factors affecting the availability of Sewing Machinists and considers the implications for training, recruitment, retention, and workforce planning.

2. Defining the Sewing Machinist workforce

As set out in Figure 1, this report uses two ways of defining the workforce.

The first is the core Sewing Machinist workforce. This includes workers classified as Sewing Machinists in official occupation data, including ANZSCO and OSCA. This definition is used to examine workforce size, age, gender, location, industry employment and employment trends.

The second is a related industrial-sewing capability group. This includes people in related occupations who may have skills that could transfer to Sewing Machinist work. These occupations may include clothing trades, textile-product workers, canvas and leather workers, upholsterers, and automotive and marine trimmers.

The broader group is used to consider possible recruitment sources, skills transfer and training pathways. It is not a separate estimate of the Sewing Machinist workforce. Workers in related occupations should not be assumed to be able to move directly into Sewing Machinist work.

Industrial sewing skills vary between products and materials. A worker experienced in apparel sewing may need further training before working with leather, heavy canvas, upholstery materials, foam-backed vinyl, automotive trim or marine products. The level of transfer depends on the machinery, materials, product requirements and quality standards involved.

Figure 1 Sewing Machinist Definition

Definition	Inclusions	Primary purpose
Core statistical workforce	Workers classified as Sewing Machinists in ANZSCO or OSCA data	Workforce size, age, gender, location and trend analysis
Related industrial-sewing capability group	Core workforce plus relevant clothing trade workers, textile product workers, canvas and leather workers, repairers, upholsterers and trimmers	Skills transfer, employer demand and training-pathway analysis

3. Method and limitations

This report is a desktop study of the demand for and supply of Sewing Machinists in Australia. It draws on publicly available data and reports from the Australian Bureau of Statistics, Jobs and Skills Australia, the National Centre for Vocational Education Research, training.gov.au, Home Affairs, and other industry sources.

The report uses:

- Occupational data to describe the size, age, gender, location and industry profile of the Sewing Machinist workforce.
- Employment, job-advertisement and vacancy-to-employment data to examine recruitment demand.
- VET enrolment and completion data to examine supply and training pathways.
- Information on migration settings and occupation lists to assess access to overseas workers.
- Industry reports and project consultations to provide practical evidence on recruitment methods, skills needs and workforce issues.

The report distinguishes the core Sewing Machinist occupation from related occupations that may offer transferable industrial sewing skills. It does not automatically count workers in related occupations, or learners in related VET qualifications, as additions to the Sewing Machinist workforce.

This report does not provide a national forecast of future workforce demand and supply. Rather, it identifies current evidence and factors that may affect demand for and the availability of Sewing Machinists.

The findings should be read with the following limitations in mind:

- Occupational data does not capture every person with industrial-sewing skills. Some workers may be classified in related occupations, be self-employed, work informally or perform sewing as only part of their job.
- ANZSCO and OSCA occupational data use different classifications, data sources and reference periods. Their employment estimates should not be combined into a single time series or interpreted as direct evidence of workforce growth or decline.
- Online job advertisements are only one measure of recruitment demand. They may understate demand where employers use referrals, industry networks, social media, labour hire, direct approaches or informal recruitment. Repeat advertising may also overstate the number of separate vacancies.

- VET data records enrolments and completions, not whether learners obtain work as Sewing Machinists, remain in the occupation or develop the specialist skills required by employers. Enrolments in broader apparel, textiles or related qualifications should not be treated as direct measures of new Sewing Machinist supply.
- NCVER figures are rounded, and some data are reported by the RTO head-office location rather than the learner's location or the location of delivery. Totals in different tables may therefore not align exactly.
- Aggregate enrolment and completion data cannot link an individual learner's enrolment to their completion. Same-year comparisons between enrolments and completions are indicative only and do not provide a formal completion rate.
- The targeted consultations undertaken for this study provide useful evidence but were not exhaustive and largely focused on State and Territory industry advisory bodies across all jurisdictions, except for South Australia and the ACT.

4. Current workforce and industry context

4.1 Workforce profile

The historical ANZSCO profile notes that 6,100 people were employed as Sewing Machinists in Australia, with 87% women, 33% working part-time, and a median age of 59 years. The current OSCA profile reports that 8,600 people are employed as Sewing Machinists, with a median age of 52 years, 76.9% female, 56.9% working full-time, and 43.2% working part-time, and that Indigenous workers make up only 1.2% of total employment.

The difference between the ANZSCO and OSCA data should not necessarily be interpreted as workforce growth. The profiles are based on different classifications, datasets, and reference periods. The core message is that Sewing Machinists are a small workforce with an older-than-average age profile, and that a consistent source must be used for time-series analysis. Figure 2 shows the age distribution of the Sewing Machinist workforce. The low share of younger workers and the large 55-plus cohort make replacement demand a central issue. The risk is not just a reduced labour force but also a loss of skills. Experienced machinists possess knowledge of specific materials, products, machinery, defects and production methods that can be difficult to replace.

Figure 2 Sewing Machinists: Workforce Age Structure 2021

Age group	Share of Sewing Machinists
15-24	5.6%
25-34	10.4%
35-44	14.3%
45-54	26.8%
55-64	32.4%
65-74	9.4%
75 and over	1.1%

Source: Jobs and Skills Australia, *Sewing Machinist: Occupation Profile*, OSCA 731431, updated 31 July 2026.

4.2 Geographic distribution

Figure 3 shows that the core workforce is concentrated in the eastern states. Victoria accounted for 32.7% of Sewing Machinists, followed by New South Wales (24.7%) and Queensland (20.7%).

Figure 3 Sewing Machinists: Employment by Jurisdiction 2021

State or territory	Share of Sewing Machinist employment, 2021
Victoria	32.7%
New South Wales	24.7%
Queensland	20.7%
Western Australia	12.1%
South Australia	7.4%
Tasmania	1.8%
Northern Territory	0.4%
Australian Capital Territory	0.3%

Source: Jobs and Skills Australia, *Sewing Machinist: Occupation Profile*, OSCA 731431, updated 31 July 2026.

4.3 Industry distribution

Manufacturing is the main employer of Sewing Machinists, accounting for 60.7% of the workforce. The remainder of the Sewing Machinist workforce is mainly employed in alteration, repair, retail, and related production.

Industrial sewing capability is used in garment and apparel production; textile products such as bags, bedding, curtains and covers; canvas and awnings; technical textiles production; leather goods; repairs and alterations; soft furnishings; and selected automotive, marine and technical-product applications.

The MST Industrial Sewing Skill Set case for change similarly identifies furnishing, automotive, marine and textile fabrication as other industry settings that require industrial-sewing skills.

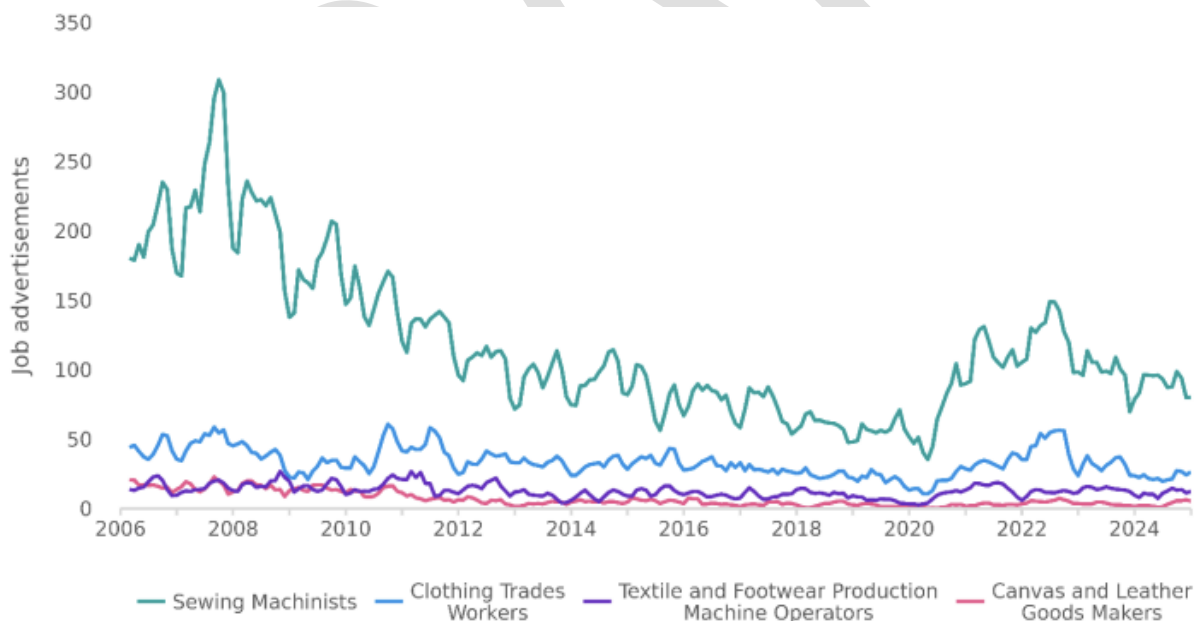
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5. Demand for Sewing Machinists

The demand for Sewing Machinists is driven by the need to meet production requirements and replace staff who retire, reduce their hours or move to other jobs. Employers need machinists to fulfil orders, sustain local production and repair functions, and replace employees who retire, reduce their hours, change jobs, or advance into specialised roles.

A recent report by Jobs and Skills Australia, titled *Sewing Machinists: Stitching the Thread on How an Industry's Decline Can Spark Increased Relative Demand for its Workers*, highlighted that overall demand for machinists is shaped by the long-term decline in domestic clothing manufacturing and the contraction and ageing of the Sewing Machinist workforce. As noted previously, Sewing Machinists are mainly employed in manufacturing (73%), which has been in long-term structural decline in Australia, leading to a loss of job opportunities in the sector. At the same time, Sewing Machinist employment has declined by 67% since 2006. The combination of a declining employment base and a contracting occupational workforce mean that demand for Sewing Machinists is limited in absolute terms but can be significant for individual employers seeking workers from a small and contracting skills pool.

Figure 4 Online job advertisements for TCF occupations March 2006 to January 2025



Source Jobs and Skills Australia: Vacancy Report: January 2025

As shown in Figure 4, monthly online job advertisements for Sewing Machinists, which may be viewed as an indicator of skill demand, declined substantially between 2006 and 2019. However, since 2019, advertisements have increased. Using the 2019 average as a benchmark, online job advertisements for Sewing Machinists rose by

160%, reaching a peak of 149 in mid-2022. Despite some fluctuations, this increase has generally been sustained.

This contrasts with the relatively stable trend in advertisements across other TCF production-related occupations and suggests that demand for Sewing Machinists is sensitive to changing industry conditions, despite the occupation's overall decline in employment.

Figure 5 provides a further indicator of relative recruitment demand by comparing the number of advertised vacancies with the number of people employed as Sewing Machinists. A higher vacancy-to-employment ratio indicates greater advertised recruitment activity relative to the size of the existing workforce. However, it does not, by itself, demonstrate a skill shortage.

As shown in Figure 5, the vacancy-to-employment ratio for Sewing Machinists declined for much of the 2010s but increased strongly from around 2020 and rose again in 2024. This suggests that employers were advertising vacancies at a higher rate than would be expected from longer-term trends, relative to the number of people employed in the occupation. Although the vacancy-to-employment ratio for Sewing Machinists has fluctuated, it has generally remained lower than that for all occupations. This gap has narrowed since 2022. Across all occupations, the vacancy-to-employment ratio averaged approximately 1.3% over the period May 2006 to November 2024.

The vacancy-to-employment ratio may understate vacancies in occupations such as Sewing Machinists. This is because recruitment for these occupations is not always conducted through online job advertisements. Consultations undertaken for this report indicated that TCF businesses, many of which are small or medium-sized enterprises, may recruit through informal channels, including word of mouth, employee referrals, industry networks, social media, labour-hire arrangements, community networks, families and direct approaches to potential workers.

In addition, the consultations revealed that employers experiencing ongoing difficulty finding skilled Sewing Machinists may also stop advertising vacancies, redesign jobs, invest in new technologies, use overtime, subcontract production, or constrain output rather than keep online advertisements active. Sewing Machinist roles may also be advertised under a variety of job titles and classified within broader occupational categories, reducing the reliability of occupation-specific vacancy data.

Definitions of employment used in the vacancy-to-employment ratio can also be problematic. This is especially the case where workers are employed across overlapping production roles or where occupational classifications do not closely reflect contemporary industry roles. Consequently, a relatively low vacancy-to-employment ratio should not be interpreted as evidence that a skill shortage does not exist.

Figure 5 Vacancy to Employment Ratio (Vacancy Rate), May 2006 to November 2024



Source Jobs and Skills Australia: Vacancy Report: January 2025

The increased relative recruitment demand may also be associated partly with workforce supply. JSA found that movement into and out of the Sewing Machinist occupation declined between 2012 and 2021, reflecting reduced occupational mobility. The workforce also has an older age profile, with the median age of Sewing Machinists being 57 in 2021. Further, only 16% of Sewing Machinists were aged under 34, compared with 37% across all occupations. These characteristics may increase replacement demand as older workers retire or otherwise exit the workforce.

Overall, the available evidence indicates that demand for Sewing Machinists is generally moderate, with periods of fluctuation, reflecting the long-term decline in domestic clothing and footwear manufacturing and the ageing of the Sewing Machinist workforce. However, recruitment demand may be significant, if not critical, for particular employers because the workforce has declined sharply, has limited new entrants, and has an older age profile. The rise in the vacancy-to-employment ratio since 2020 suggests increased advertised recruitment activity relative to workforce size, but according to Jobs and Skills Australia, this does not establish a national skill shortage.

Jobs and Skills Australia have not identified Sewing Machinists as an occupation in shortage at the national, State, or Territory level. However, the Western Australia Department of Training and Workforce Development has recently listed Sewing Machinists on the State Priority Occupation List. Further, a recent occupational skills survey conducted by the Australian Fashion Council found that '... all brands reporting on Sewing Machinist roles cited a severe undersupply of skilled workers'. This aligns with both the consultations conducted during this project and the submission to the

2025 Core Skills Occupations List (CSOL) Consultations by Silver Fleece, a South Australian TCF enterprise, which argued that '... the following roles are in critical shortage Industrial Sewing Machinists - Experienced machinists with stretch and knit expertise to deliver consistent, high-quality garments at scale.'

It is also reflected in Figure 6, which shows the annualised number of online job advertisements for Sewing Machinists compared with upholsterers, vehicle body builders and trimmers, and canvas and leather goods makers over the period 2006-2025.

Figure 6 Annualised Internet Vacancy Index measure of online job advertisements for select occupations

Year	Sewing Machinists 7116	Upholsterers 3933	Vehicle Body Builders & Trimmers 3242	Canvas & Leather Goods Makers 3931
2006	2,406	718	490	200
2007	2,860	840	523	195
2008	2,512	684	541	184
2009	2,074	507	342	173
2010	1,843	442	392	148
2011	1,569	401	392	90
2012	1,266	346	322	67
2013	1,125	292	236	41
2014	1,129	357	312	59
2015	986	416	245	68
2016	949	324	293	51

2017	883	287	311	40
2018	731	254	365	36
2019	687	207	320	26
2020	774	205	363	17
2021	1,325	280	470	33
2022	1,521	324	471	62
2023	1,188	245	524	39
2024	1,087	171	416	37
2025	1,167	224	345	40

Source: Jobs and Skills Australia, Internet Vacancy Index (IVI), ANZSCO4 Occupations, States and Territories, June 2026 release. Occupational group definitions: Jobs and Skills Australia ANZSCO occupation profiles

Note: The figures in this table are an annualised indicator based on monthly three-month averages, not unique annual vacancies.

While online advertisements for Sewing Machinists declined markedly over the longer term, as noted earlier in this report, this trend reversed after 2020. Advertisements peaked at 1,521, then moderated to 1,188 in 2023 and 1,087 in 2024, before rising slightly to about 1,167 in 2025. The 2025 level was therefore about 70 per cent above the 2019 pre-pandemic level. Although this is still about 59 per cent below 2007, there appears to have been a pronounced post-2020 increase that has been sustained. Online advertisements show a broadly similar long-term pattern for Upholsterers and Canvas and Leather Goods Makers, while Vehicle Body Builders and Trimmers show a less pronounced long-term decline.

This vacancy data reveals a potential gap between advertised jobs and the official skill shortage classifications for related occupations. From 2018 to 2025, Sewing Machinists had the highest annualised IVI measure among the four selected occupations, with an average of about 1,060 online job advertisements annually, compared to roughly 409 for Vehicle Body Builders and Trimmers, 239 for Upholsterers, and just 36 for Canvas and Leather Goods Makers. Despite this much higher advertising activity, Sewing Machinists are not currently classified as being in

shortage, while Upholsterers and Vehicle Trimmers, which are part of the Motor Body Builders and Trimmers category, are recognised as facing skill shortages. This suggests that not having a formal shortage classification for Sewing Machinists should not automatically be seen as low employer demand or sufficient worker supply. Instead, when considering the small size of the Sewing Machinist workforce and the persistent vacancies, the data points to the need to evaluate whether current methods for assessing occupational shortages accurately reflect recruitment pressures in this occupation.

While Sewing Machinists may not meet JSA's technical definition of an occupation in skill shortage, the occupation's declining employment base, ageing workforce, and rising vacancy-to-employment ratio indicate an ongoing need to maintain and replenish sewing machining capability. This need is likely to become more pressing as textile repair, reuse, and recycling activities expand in response to government and industry sustainability and circular-economy initiatives, and as manufacturers consider onshoring some of their production activities in response to supply chain disruptions

6. Supply of Sewing Machinists

6.1 Sources of supply

The supply of Sewing Machinists extends beyond VET graduates. It includes current workers who change employers or seek additional work; former machinists returning to work; self-employed workers; subcontractors; workers with overseas experience; people transitioning from alterations, clothing trades, upholstery, leatherwork, canvas fabrication, textile production, automotive trimming or marine trimming; and recent migrants and refugees seeking employment, who may or may not have machinist skills. The capacity of workers to transfer between sectors, for example from garment sewing to automotive trimming, depends on the work and the availability of bridging training. General sewing experience can provide a foundation, but moving between light apparel, stretch fabrics, leather, heavy canvas, foam-backed vinyl, upholstery and marine or automotive trim may require bridging training, supervised practice and product-specific knowledge.

Mainstream skilled migration is a limited and unreliable source of Sewing Machinists. The occupation has very limited access to Australia's mainstream skilled-migration program. Sewing Machinists are not included on the Core Skills Occupation List and are consequently ineligible for new sponsorship through the Skills in Demand visa (subclass 482) Core Skills stream and the Employer Nomination Scheme (subclass 186) Direct Entry stream. It is also not available through the standard skilled independent, state-nominated or regional points-tested pathways, including subclasses 189, 190, 491 and 494. Potential pathways are limited to labour-agreement arrangements where the occupation is expressly specified, including the Skilled Refugee Labour Agreement Pilot, or exceptional short-term specialist work under subclass 400. The only published occupation-specific grant figure identified was fewer than five subclass 400 grants between January and August 2022; publicly available data do not provide a verified current total of successful Sewing Machinist applicants across the main skilled visa programs. While acknowledging the range of supply sources, this report focuses on entry-level VET pathways for Sewing Machinists.

6.2 VET pathways for entry-level Sewing Machinists

MSTSS00015 Industrial Sewing Skill Set and MST20722 Certificate II in Apparel, Fashion and Textiles, both within the MST Textiles, Clothing and Footwear Training Package, are the key programs for developing entry-level Sewing Machinist skills.

6.2.1 MSTSS00015 Industrial Sewing Skill Set

As shown in Figures 7 and 8, South Australia accounted for most enrolments, approximately 225, or about 80% of the five-year total. Enrolments in South Australia

were recorded each year, rising from 40 in 2021 to 55 in 2022, then declining gradually to 35 in 2025. This indicates an established, ongoing but modest training presence. Victoria recorded about 25 enrolments, concentrated in 2021 (20) and 2022 (5), with no enrolments from 2023 onwards. Western Australia recorded approximately 25 enrolments, all in 2025, suggesting the commencement or resumption of delivery in that year. New South Wales recorded approximately five enrolments, only in 2024.

Figure 7 MSTSS00015 Industrial Sewing Skill Set - enrolments 2021-2025

Year	Enrolments
2021	55
2022	60
2023	50
2024	50
2025	55
Total	275

Source: NCVER Databuilder 2026

Figure 8 MSTSS00015 Industrial Sewing Skill Set - Enrolment by jurisdiction 2021-2025

State or Territory	Approximate enrolments, 2021-25	Pattern
South Australia	225	Delivery in every year; 35-55 enrolments annually
Victoria	25	Enrolments in 2021-22 only
Western Australia	25	Enrolments recorded in 2025 only
New South Wales	5	Enrolments recorded in 2024 only

Source: NCVER Databuilder 2026

Note: The State and Territory totals should be treated as approximate because NCVER data is rounded to the nearest five. Consequently, summing the rounded state and annual values may not exactly match the rounded national total.

While enrolments in this qualification are low, it is regularly offered through partnerships between RTOs and social enterprises. This is particularly the case when the qualification is directed at women, migrants, refugees and other vulnerable groups seeking employment as entry-level Sewing Machinists or in other production roles in the TCF industry.

As shown in Figure 9, participation in the program was predominantly female, with about 220 female enrolments and 25 male enrolments across the period. Females represented approximately 80% or more of all enrolments.

Figure 9 MSTSS00015 Industrial Sewing Skill Set - Enrolment by gender 2021-2025

Year	Female	Male	Not identified by gender	Enrolments
2021	55	0	0	55
2022	55	10	0	60
2023	30	15	5	50
2024	40	0	10	50
2025	40	0	15	55
2021–25 total	220	25	30	275

Source: NCVER Databuilder 2026

Female participation was particularly pronounced in South Australia and Victoria. All recorded enrolments in Victoria were female. In South Australia, females accounted for approximately 180 of 225 enrolments, compared with approximately 35 male enrolments; the remaining difference reflects rounding or gender categories not separately displayed. In Western Australia, approximately 20 of the 25 enrolments were recorded as female.

As shown in Figure 10, enrolments were concentrated among mature-age learners. The largest age group was 30–39 years, with approximately 65 enrolments, followed

by 40–49 years with approximately 60. Together, these two cohorts accounted for around 125 enrolments, or roughly 45% of the five-year total. Learners aged 50 years and over accounted for approximately 75 recorded enrolments across the 50–59, 60–64 and 65-and-over groups.

Figure 10:

Figure 10 MSTSS00015 Industrial Sewing Skill Set - Age of participants 2021-2025

Age group	Approximate enrolments
15–19 years	15
20–24 years	20
25–29 years	30
30–39 years	65
40–49 years	60
50–59 years	45
60–64 years	20
65 years and over	10

Source: NCVER Databuilder 2026

As shown in Figure 11, Australian-born learners accounted for between 25 and 35 enrolments per year. Their participation peaked at approximately 35 enrolments in 2022 and 2024, before declining to 25 in 2025. The estimated number of overseas-born learners increased from approximately 15 in 2021 to 20 in both 2022 and 2023, declined to 15 in 2024, and then rose to 30 in 2025. This means overseas-born learners accounted for an estimated 55% of enrolments in 2025, compared with approximately 45% for Australian-born learners.

The identified overseas birth countries were South Korea; India; England; Iran; Myanmar; and Sri Lanka. The proportion of overseas learners suggests that this skill set provides a pathway to employment for migrant and refugee communities, particularly learners from Iran, Myanmar and Sri Lanka.

Figure 11 MSTSS00015 Industrial Sewing Skill Set - Country of birth of participants 2021-2025

Year	Australia-born	Outside Australia	Country of birth not known	Total enrolments
2021	25	15	15	55
2022	35	20	5	60
2023	30	20	0	50
2024	35	15	0	50
2025	25	30	0	55
2021–25 total	150	100	20	275

Source: NCVER Databuilder 2026

Note: Outside Australia is calculated as total enrolments less Australia-born enrolments and enrolments with country of birth recorded as "Not known". As all figures are rounded to the nearest five, annual totals may not sum exactly to the five-year total.

Figure 12 MSTSS00015 Industrial Sewing Skill Set - Enrolments and completions 2021-2025

Year	Enrolments	Completions	Difference	Completions as % of enrolments
2021	55	20	35	36%
2022	60	0	60	0%
2023	50	0	50	0%
2024	50	5	45	10%
2025	55	20	35	36%

2021–25 total	275	45	230	16%
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Source: NCVER Databuilder 2026

Note: This is an indicative same-year comparison only. It is not a formal completion rate because aggregate enrolment and completion records cannot link an individual learner's enrolment to their outcome. All figures are rounded to the nearest five.

As shown in Figure 12, recorded completions of the Industrial Sewing Skill Set were low relative to annual enrolments, with approximately 45 completions recorded against 275 enrolments between 2021 and 2025. As the skill set is short, enrolments and completions would normally be expected to occur in the same calendar year. The substantial divergence between the two measures - particularly the absence of recorded completions in 2022 and 2023 - warrants further investigation. However, NCVER notes that program-completion data are subject to revision, and the aggregate data do not support calculation of a definitive completion rate.

Overall, the Industrial Sewing Skill Set appears to have served a small group of learners dominated by women aged 30 years and over, with delivery concentrated in South Australia. The limited participation of people under 25, approximately 35 recorded enrolments over five years, suggests that the skill set was not functioning primarily as a youth-entry pathway during this period.

6.2.2 MST20722 Certificate II in Apparel, Fashion and Textiles

MST20722 Certificate II in Apparel, Fashion and Textiles is a recently developed, multi-stream qualification. The qualification includes a specialist stream in apparel and textile production, which provides a pathway for Sewing Machinists. The qualification also includes related streams in textile fabrication and footwear production, which may also include sewing machinery.

This qualification is delivered through 26 Registered Training Organisations. While most enrolments are young people (see Figure 15), the qualification is often delivered in partnership between RTOs and social enterprises. This is particularly the case when the qualification is directed at women, migrants, refugees and other vulnerable groups seeking employment as Sewing Machinists or in other production roles in the TCF industry.

As shown in Figure 13, enrolments in this qualification rose quickly from 1,465 in 2024 to 2,095 in 2025.

Figure 13 MST20722 Certificate II in Apparel, Fashion and Textiles - Enrolments 2024-2025

Year	Enrolments
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2024	1,465
2025	2,095
2024-25 total	3,590

The program is delivered through RTOs headquartered in New South Wales, Victoria, Queensland, South Australia and Western Australia, with Victoria accounting for the largest share of enrolments in 2024 and 2025. As shown in Figure 14, in 2025, Victoria accounted for approximately 57% of national enrolments, followed by New South Wales (16%), Queensland (15%) and Western Australia (11%). South Australia accounted for around 1%. These figures describe the RTO head-office location and may not necessarily identify the learner's residence or the actual delivery location.

Figure 14:

Figure 14 MST20722 Certificate II in Apparel, Fashion and Textiles - Enrolment by jurisdiction 2023-2025

State or Territory	2023	2024	2025	Pattern
New South Wales	0	255	345	Strong growth in 2025
Victoria	5	750	1,190	Largest delivery location
Queensland	15	280	310	Substantial, relatively stable expansion
South Australia	0	0	20	Small commencement in 2025
Western Australia	5	175	230	Sustained growth in 2025
Australia	30	1,465	2,095	–

As shown in Figure 15, this qualification was female-dominated. Females accounted for approximately 1,150 enrolments in 2024 and 1,740 in 2025 - around 78% and 83% of annual enrolments, respectively. Male enrolments were approximately 270 in 2024 and 330 in 2025, or around 18% and 16%.

Figure 15 MST20722 Certificate II in Apparel, Fashion and Textiles - Enrolment by gender 2024-2025

Year	Female	Male	Other or not known	Total
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2024	1,150	270	45	1,465
2025	1,740	330	25	2,095

Source: NCVER Databuilder 2026

Female participation was especially concentrated among 15-19-year-olds in Victoria and Queensland. Male participation was more evenly distributed across younger and mature-age cohorts, particularly in Western Australia and New South Wales.[1]

As shown in Figure 16, the program is primarily delivered to young people aged 15-19 years. This group accounted for approximately 1,125 enrolments in 2024 (77% of all enrolments) and 1,760 enrolments in 2025 (84% of enrolments). The large Victorian cohort was particularly concentrated in this age group.

Figure 16 MST20722 Certificate II in Apparel, Fashion and Textiles - Enrolments by age 2021-2025

Age group	2023	2024	2025
15-19 years	15	1,125	1,760
20-24 years	0	85	40
25-29 years	0	35	40
30-39 years	5	75	75
40-49 years	5	65	75
50-59 years	0	50	65
60-64 years	0	15	20
65 years and over	0	15	20
Age not separately displayed	5	0	0
Total	30	1,465	2,095

Source: NCVER Databuilder 2026

Overall, MST20722 Certificate II in Apparel, Fashion and Textiles is attracting a large, predominantly female, school-age or youth-focused group of learners. The concentration of enrolments among 15–19-year-olds, particularly in Victoria, suggests that school-based, secondary-school transition, or youth training arrangements were likely major drivers of the expansion.

While this qualification may appear to provide a pipeline for Sewing Machinists, not all learners undertaking MST20722 aspire to become Sewing Machinists. In 2024, only 195 of the 1,465 learners enrolled in the qualification were enrolled in the key industrial sewing machine unit of competency, MSTTX2014 - Perform industrial sewing on textile products. Similarly, in 2025, only 115 of the 2095 learners enrolled in the qualification were enrolled in this unit.

6.3 Related VET pathways

The following qualifications relevant to the furnishings, leather, and automotive and marine trimming sectors provide new entrants with industrial sewing skills and possible career progression but should not be automatically counted as core Sewing Machinist supply.

6.3.1 MSF30722 Certificate III in Upholstery. This qualification provides entry-level training for workers who select, cut, sew and fit upholstery materials.

As shown in Figures 17 and 18, enrolments in MSF30722 Certificate III in Upholstery were modest but increased slightly from approximately 165 in 2024 to 175 in 2025. Delivery was distributed across New South Wales, Victoria, Queensland and Western Australia, with Victoria recording the strongest growth—from around 50 enrolments in 2024 to 75 in 2025—while New South Wales and Queensland each recorded small declines.

The gender profile shifted from male-majority participation in 2024 (approximately 90 males and 75 females) to female-majority participation in 2025 (approximately 90 females and 85 males). Enrolments included both younger learners, particularly in Queensland, and mature-age learners, with Victorian female enrolments concentrated in the 40–59 age groups.

Figure 17 MSF30722 Certificate III in Upholstery - Enrolments 2024-2025

State or territory of RTO head office	2024	2025	Total
New South Wales	50	45	95

Victoria	50	75	125
Queensland	50	45	95
Western Australia	15	10	25
Australia	165	175	340

Source: NCVER Databuilder 2026

Figure 18 MSF30722 Certificate III in Upholstery - Enrolments by gender 2024-2025

Gender	2024	2025	Total
Males	90	85	175
Females	75	90	165
Australia	165	175	340

Source: NCVER Databuilder 2026

6.3.2 AUR32320 Certificate III in Automotive and Marine Trimming Technology.

This qualification provides entry-level training for workers involved in the manufacture, repair and maintenance of trim components for motor vehicles, marine craft and related products. Enrolments in AUR32320 Certificate III in Automotive and Marine Trimming Technology were small but relatively stable, rising from about 60 in 2022 to a peak of 90 in 2024, then easing to 85 in 2025 (See Figure 19). No enrolments were reported for 2021. Delivery was concentrated in New South Wales, which accounted for around two-thirds of enrolments in 2024 and 2025. Victoria maintained a small, consistent cohort of about 20 enrolments per year, while Western Australia commenced delivery in 2023 and recorded about 15 enrolments in both 2024 and 2025.

The qualification remained predominantly male throughout the period, but female enrolments grew from about 10 in 2022 and 2023 to 15 in 2024 and 20 in 2025. By 2025, females accounted for roughly 25% of enrolments. Participants mainly fell into younger age groups, especially 15-19 and 20-24 years old, though New South Wales also had some mature-age learners.

Figure 19 AUR32320 Certificate III in Automotive and Marine Trimming Technology - Enrolments 2022-2025

Year	Male	Female	Total
2022	50	10	60
2023	70	10	80
2024	75	15	90
2025	65	20	85

Source: NCVER Databuilder 2026

6.3.3 Certificate II in Leather Production (MST20319) and Certificate III in Leather Production (MST30519)

Enrolments in the Certificate II and Certificate III in Leather Production were small and concentrated in Queensland, with total annual enrolments ranging from approximately 105 to 140 between 2021 and 2025 (See Figure 20). The Certificate II accounted for most enrolments and was primarily delivered to learners aged 15-19, while the Certificate III served a much smaller, more mixed-age group.

Figure 20 Certificate II in Leather Production (MST20319) and Certificate III in Leather Production (MST30519) - Enrolments by qualification 2021-2025

Year	Certificate II in Leather Production (MST20319)	Certificate III in Leather Production (MST30519)	Total enrolments
2021	95	10	105
2022	115	25	140
2023	80	25	105
2024	90	35	125
2025	85	25	110
2021-25	465	120	585

Source: NCVER Databuilder 2026

Note: Certificate III figures are derived as the difference between total enrolments and Certificate II enrolments. They should be treated as approximate because NCVER figures are rounded independently to the nearest five.

All enrolments were reported through Tactile Learning, an RTO headquartered in Queensland. Most delivery occurred in Queensland, although a small Certificate III cohort was delivered in South Australia from 2023 onwards, through the Queensland-headquartered RTO. South Australian enrolments increased from approximately five in 2023 to 15 in both 2024 and 2025.

The Certificate II was the main entry-level program, accounting for around 80% of enrolments across the period. Its learners were overwhelmingly aged 15–19 years, indicating a strong youth or school-to-work focus. The Certificate III had more limited enrolments and included learners aged 15–19, 20–24 and 30–39 years, including adult learners in the South Australian group.

Enrolments were female-majority in most years. Female enrolments increased from approximately 50 in 2021 to 80 in 2022, then remained between 60 and 70 annually from 2023 to 2025. Male enrolments ranged from approximately 35 to 55 per year. Across 2021–25, the data indicate around 325 female and 250 male enrolments.

6.4 Overview of the supply of Sewing Machinists

Australia's supply of Sewing Machinists is drawn from a diverse but limited pool. It includes existing and returning workers, self-employed and subcontracted workers, people with overseas experience, women seeking career changes or re-entry to the workforce, recent migrants, refugees and members of vulnerable groups, and workers from related sewing occupations. However, these sources are not fully interchangeable: people moving from upholstery, leatherwork, canvas fabrication or vehicle trimming may require bridging training and workplace experience to meet the material, machinery and production requirements of specific roles.

Mainstream skilled migration offers limited capacity to supplement supply, as Sewing Machinists are ineligible for the main employer-sponsored, points-tested or regional skilled-migration pathways. VET provision is also fragmented. The most direct entry-level program, the Industrial Sewing Skill Set, recorded only about 275 enrolments from 2021 to 2025, concentrated in South Australia, and completions were low. Although the Certificate II in Apparel, Fashion and Textiles has grown rapidly, it is a broad qualification, and only a small share of learners undertake its key industrial-sewing unit.

Related qualifications in upholstery, automotive and marine trimming, and leather production can provide relevant skills, but graduates cannot automatically be considered job-ready Sewing Machinists. Overall, the supply pipeline depends on retaining experienced workers, targeted entry-level training, bridging transferable

skills, and employer-supported workforce training, rather than a large national flow of graduates or skilled migrants.

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7. Key findings and implications

7.1 Key findings

This report finds that Sewing Machinists are a small, predominantly female workforce with an older age profile and limited entry of younger workers. The workforce is concentrated in Victoria, New South Wales and Queensland, and mainly employed in manufacturing, although industrial sewing capability is also used in textiles, furnishings, leather goods, canvas, repairs, upholstery, automotive trimming and marine trimming. The ageing profile of the workforce means that replacement demand will remain important, particularly where experienced workers hold specialist knowledge of machinery, materials, products and quality requirements.

Demand for Sewing Machinists is generally moderate, with periods of fluctuation, reflecting the long-term decline in domestic clothing and footwear manufacturing and the ageing of the Sewing Machinist workforce. However, employers may face significant recruitment difficulties because they are drawing from a small and declining pool of workers. Job advertisements and the vacancy-to-employment ratio indicate variable but ongoing recruitment demand. While JSA has not classified Sewing Machinists as being in national shortage, consultations and industry evidence indicate that many employers have difficulty finding experienced machinists, particularly those with specialist skills in particular products, materials or machinery.

The available supply pipeline is limited and fragmented. The Industrial Sewing Skill Set is the most directly relevant entry-level program, but enrolments were low and concentrated in South Australia. The much larger Certificate II in Apparel, Fashion and Textiles cannot be treated as a direct measure of Sewing Machinist supply because it covers several streams and only a minority of learners undertake the key industrial-sewing unit. Related qualifications in upholstery, automotive and marine trimming, and leather production may provide useful transferable skills, but their graduates are not automatically able to work as Sewing Machinists without additional training and workplace experience.

Mainstream skilled migration is a very limited and unreliable source of Sewing Machinists. The occupation is not included in the Core Skills Occupation List and is not generally available through the main employer-sponsored, points-tested or regional skilled-migration pathways. Labour agreements, the Skilled Refugee Labour Agreement Pilot and exceptional short-term specialist arrangements may offer limited alternatives, but they are unlikely to supply workers at the scale required to replenish the workforce.

7.2 Implications for entry-level pathways for Sewing Machinists

Overall, the evidence in this report indicates that the current approach to building the supply of new entrants to the Sewing Machinist occupation does not meet demand, and that attention needs to be given to establishing a sustained, albeit modest, pipeline of new entrants.

From 2021 to 2025, the annualised IVI measure for Sewing Machinist job advertisements remained above 1,000 each year, compared with an estimated national Sewing Machinist workforce of approximately 6,000 to 8,600 people. While some vacancies will be filled by existing machinists moving between employers, labour mobility within a workforce of this size is unlikely to meet the full level of recruitment demand, particularly where employers require experienced industrial sewing skills. The capacity to address shortages through skilled migration is also constrained because Sewing Machinists are not currently eligible for the main employer-sponsored skilled visa pathways, and the VET system is not producing a consistent or sufficiently large flow of newly trained Sewing Machinists.

Taken together, these factors indicate a structural gap in the mechanisms available to sustain and replenish the Sewing Machinist workforce. The occupation has an ageing and relatively small workforce, limited access to mainstream skilled migration, and a fragmented training pipeline.

While the available data cannot quantify a national annual shortfall, they support the development of a more coordinated and employment-linked entry pathway for Sewing Machinists.

It is recommended that the findings of this report inform the design and testing of a coordinated entry-level pathway for Sewing Machinists. An initial five-year pilot should be developed in collaboration with employers, RTOs, social enterprises and industry bodies in jurisdictions with substantial Sewing Machinist employment and demonstrated employer demand. The pilot's performance should be measured against completion, work placement, employment, retention and progression outcomes, not enrolments alone. If successful, this workforce development initiative could provide a systematic approach to addressing persistent recruitment demand, the need for workforce replacement, and the longer-term renewal of the Sewing Machinist workforce. The pilot should:

- Provide foundational industrial sewing skills, including safe use of industrial machinery, production workflow, quality checking, fault identification and basic maintenance.

- Include structured workplace learning or supervised production practice. Classroom-based training alone is unlikely to develop the speed, consistency and product knowledge required for employment.
- Allow for specialist or elective skill development in key materials and applications, such as apparel, stretch and knit fabrics, leather, heavy canvas, upholstery, automotive trim and marine products.
- Include bridging or upskilling options for workers with related skills, including clothing trades workers, upholsterers, trimmers, leather workers and people with overseas sewing experience.
- Support participation by women, mature-age workers, migrants and refugees, while also creating clearer entry options for younger workers and school leavers.
- Be designed with employers, RTOs, social enterprises and industry bodies so that training reflects current equipment, materials, quality standards and local job opportunities.
- Track outcomes beyond enrolment, including completion, work placement, employment, retention and progression into more specialised roles.

The key implication is that an entry-level pathway should not be treated simply as a qualification or a short course. It should be a supported transition into workplace production, with a foundation in industrial sewing and clear options to build specialist capability in the sectors where demand exists.

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Consultations

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- Holmesglen Institute
- Industry Skills Advisory Council NT
- Manufacturing Skills Australia - NSW
- Manufacturing Skills Queensland
- NSW TAFE
- Skills Tasmania
- Victorian Skills Commission