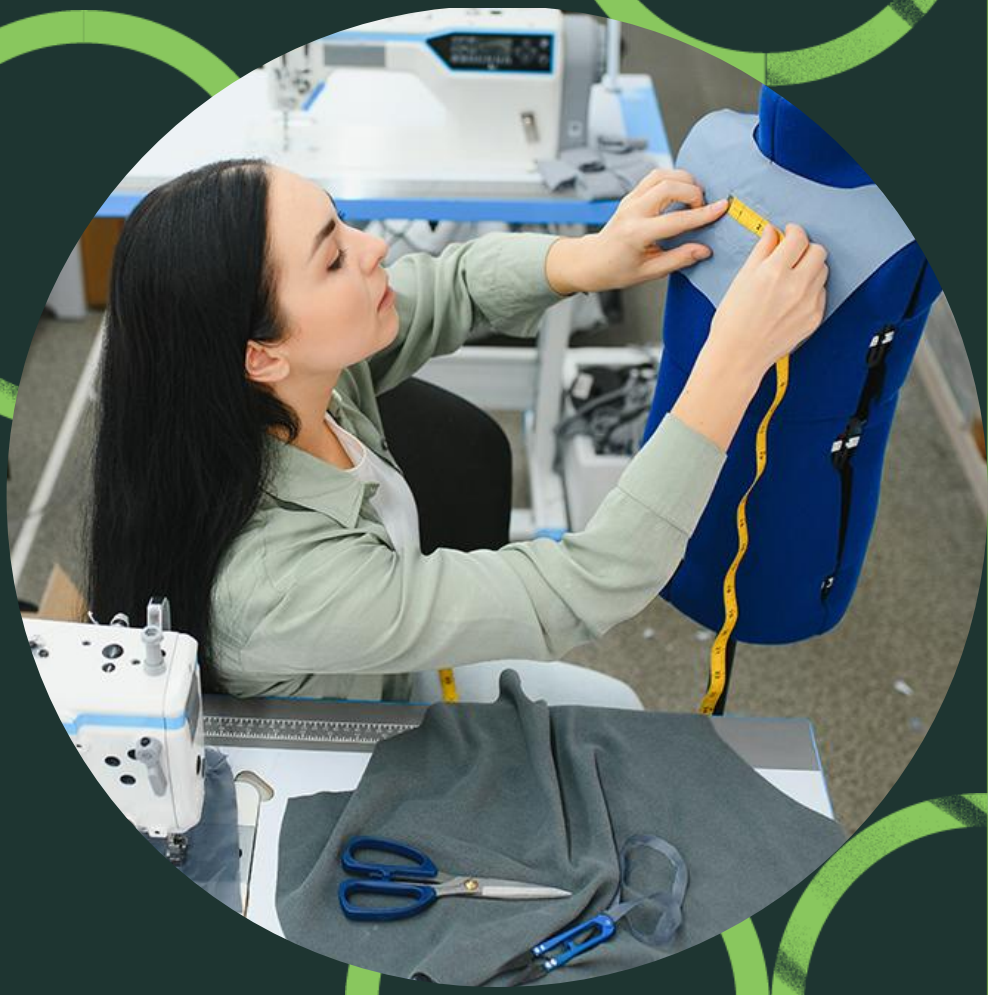
Textile, Clothing and Footwear Industry Skills and Occupation Mapping Guide

Occupational Frameworks, Skill Profiles and Workforce Insights for Australia's TCF Industry



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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 our 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.

Skills Insight is a Jobs and Skills Council funded by the Australian Government Department of Employment and Workplace Relations.

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Section 1: Introduction

The Textile, Clothing and Footwear (TCF) Occupation and Skills Map, created by TextileWorks as part of its collaborative partnership with Skills Insight, offers an overview of jobs within the main sectors of Australia's TCF industry. The map details the occupational structure for each of the following sectors:

- Textile manufacturing
- Fashion and apparel manufacturing
- Leather production and leather goods manufacturing
- Footwear manufacturing
- Laundry and dry cleaning services
- Clothing and footwear repair and alteration services
- Textile waste recycling and remanufacturing.

The description of each sector starts with background information, including its structure, economic contribution, key trends, transformation priorities, and future growth areas. This provides the foundation for understanding the occupational framework by explaining how the sector operates today and how it is expected to develop.

The occupational framework organises the sector's occupations by functional areas that cover the entire production system. These typically include product design and development, production, materials and technical functions, quality and compliance, maintenance and engineering, logistics and distribution, and business support functions. Occupations are classified as core, scale-dependent or emerging, indicating their relevance across different business sizes and stages of industry development.

Each occupation in the framework has a unique code (for example, SSLPR8 Raw Hide Procurement Specialist or CS61 Production Assistant) that directly links to a detailed Skill Profile or occupation description. The coding system also indicates whether the occupation is cross-sector (CS), meaning it may be found across a range of TCF sectors or is specific to a certain TCF subsector (for example, SSLPR for Leather Production).

The framework is designed to be read as a map of how work is organised within the sector. It shows both the range of occupations and their relationship to different stages of the value chain, and it reflects the diversity of business models across the TCF industry—from small, multi-skilled operations to larger enterprises with more specialised roles.

Each occupation within the framework is supported by a corresponding Skill Profile. The Skill Profile provides a detailed description of the role and identifies the skills required for effective performance. The Skill Profile is designed to be used by

employers, training providers, workforce planners and individuals seeking to understand the requirements of an occupation.

Each Skill Profile typically includes:

- Job role description – an overview of the purpose of the role and how it contributes to the production system
- Performance expectations – the key outcomes and standards expected in the role
- Key tasks and critical work functions – the main activities undertaken and the essential functions that underpin performance
- Technical skills – the specific trade, technical or digital capabilities required to perform the role
- Generic skills – transferable skills such as problem solving, communication, teamwork and time management
- Specialisations – optional areas of focus or advanced practice within the role
- Emerging skills – new and evolving capabilities reflecting changes in technology, sustainability and industry practices
- Application across TCF sectors – how the role or its skills may transfer to other subsectors
- VET qualifications and skill sets – indicative training pathways and qualifications
- Job progression – typical career pathways and advancement opportunities
- Classification information – alignment with frameworks such as AQF levels, ABS skill levels and OCSA.

By combining occupational structure with detailed skill information, the occupational framework and Skill Profiles provide a comprehensive and practical tool for understanding current and emerging occupations and skill needs across sectors. They support workforce planning, training development, career pathway planning, and industry policy by clearly defining both the roles within the sector and the skills required to undertake them.

1.1 How to use this document

This document is intended for employers, industry bodies, training providers, policymakers, and individuals to understand the structure of occupations and skills within the TCF industry.

Readers should start with an overview of the TCF industry in Australia, which provides a high-level review of the key forces driving its transformation.

They should then review the introductory section for each TCF subsector, which gives context about the sector, including its structure, economic contribution, key trends, and future priorities. This information helps clarify why certain roles exist and how they are evolving.

The occupational framework, shown in Figure 1 for each sector section, identifies the range of occupations within the sector. Organised by functional area, the framework

illustrates how occupations connect to different stages of the value chain. Each occupation is assigned a role code (such as CS or subsector-specific codes), which helps locate the corresponding Skill Profile.

Readers can then consult the Skill Profiles for detailed information about individual roles. These profiles offer insights into job responsibilities, necessary skills, qualifications, and career pathways, and can be used to support workforce planning, training design, role clarification, and career development.

The document can be used in different ways depending on the reader's needs:

- Employers can identify roles and skills required for current and future operations
- Training providers can align courses and programs to industry skill requirements
- Policymakers and industry bodies can support workforce and skills development strategies
- Individuals can explore career pathways and understand the skills needed for specific roles.

Together, the sector context, occupational frameworks, and Skill Profiles aim to offer a tool for understanding and enhancing workforce capability across the TCF industry.

1.2 TCF industry overview

Building on the overview of the occupational framework and guidance on how to use this document, this section offers a consolidated summary of the TCF industry in Australia. It provides the broader industry context that supports the occupational frameworks and Skill Profiles outlined throughout the report.

While Sections 1.1 and 1.2 explain how occupations are organised and how the framework should be understood, it is also crucial to grasp the economic, structural, and technological environment in which these roles operate. The nature of work in the TCF industry is shaped by how the industry is structured, the types of products and services it offers, and the key trends impacting its growth.

This section therefore offers a high-level overview of the TCF industry across all subsectors, using a consistent structure that mirrors the introductory sections provided for each individual sector. It outlines the industry's scope, its economic contribution, the key trends and drivers shaping its development, the main transformation priorities, and the areas for future growth.

Together, these elements offer vital context for understanding the occupational frameworks that follow. They clarify why specific roles exist, how they are evolving, and where future workforce demand is likely to grow. This ensures that the occupational framework is seen not just as a static listing of jobs, but as a dynamic reflection of workforce capabilities within an evolving industry.

1.2.1 Industry definition and scope

The TCF industry in Australia covers the design, development, manufacturing, and servicing of textile, clothing, footwear, and leather products, along with related services such as laundry, dry cleaning, repair, and alterations.

The industry comprises seven primary sectors:

- Textile manufacturing
- Fashion and apparel manufacturing
- Leather production and leather goods manufacturing
- Footwear manufacturing
- Laundry and dry cleaning services
- Clothing and footwear repair and alteration services
- Textile waste recycling and remanufacturing.

Across these sectors, the industry encompasses a broad range of activities, including fibre processing, fabric production, garment construction, footwear assembly, leather treatment, product design, technical development, cleaning services, and repair work. It also involves supporting functions such as sourcing materials, quality assurance, logistics, and distribution.

The TCF industry in Australia features a wide range of business models, from small, owner-operated workshops and boutique producers to medium-sized companies, specialised service providers, and larger integrated firms. Although large-scale mass manufacturing has mostly relocated offshore, Australia maintains domestic capabilities in niche and high-value sectors, including premium apparel, technical textiles, safety footwear, leather goods, and industrial laundry services (IBISWorld 2025).

As a result, the industry is increasingly focused on specialised, high-quality production, design-led innovation, and service-based activities rather than high-volume manufacturing.

1.2.2 Economic contribution

The TCF industry is a notable, though relatively small, part of Australia's broader manufacturing and service economy. As of 2023, about 11,500 businesses operate within the sector, with 42% in laundry and dry cleaning services, 24% in apparel manufacturing, and 22% in textile manufacturing. Nearly 60% of these businesses are non-employing, around 30% have between 1 and 4 employees, and just over 10% employ between 9 and 20 people. Most of these businesses are based in New South Wales, Victoria, and Queensland, and mainly in major urban areas.

Employment in the industry was about 39,700 people in 2021, with most working in Laundry and Dry cleaning services, followed by clothing manufacturing and textile production (ABS 2021; ForestWorks & Skills Insight 2025).

Within manufacturing, employment is concentrated in cut-and-sew textile production, which alone employs over 8,000 workers, underscoring the ongoing importance of garment-related manufacturing. The TCF workforce is highly diverse, including production, technical, creative, service, and managerial roles, with around 40 per cent employed in specialised TCF occupations, and the rest in cross-sector roles like sales, logistics, and administration.

More recent labour force trends show a continued decline in traditional large-scale manufacturing jobs, alongside stabilisation or growth in service-oriented and niche production activities. The economic structure of the TCF industry can be broadly characterised as follows:

- laundry and dry cleaning services hold the largest share of employment and generate steady revenue,
- apparel manufacturing, which is mostly small-scale, accounts for the largest portion of manufacturing activity, with, for example, the production of women's and girls' wear generating about $500–600 million annually
- technical textiles constitute a smaller but strategically significant sector
- footwear and leather goods manufacturing are niche but high-value segments that are connected strongly to industrial and safety markets; and
- repair, alteration, and circular services are small but growing, in line with increasing consumer, government, and business interest in sustainability.

Across these segments, the industry's economic value increasingly comes from high-value, low-volume production, specialised technical capability, and service delivery, rather than large-scale manufacturing.

Although domestic manufacturing output is declining due to global competition, the industry's economic contribution extends beyond producing goods. It is crucial for supporting product design and development, maintaining specialised technical and trade skills, and supporting downstream sectors such as construction, mining, defence, healthcare, and hospitality. Additionally, it provides vital services like laundry, dry cleaning, and repairs.

1.2.3 Key trends and drivers

The structure and performance of the Australian TCF industry is shaped by a range of interconnected economic, technological, and social factors.

The most significant long-term trend has been the effect of globalisation and import competition. Moving large-scale manufacturing offshore has decreased local production capacity, especially in high-volume, low-cost segments. Imported products currently dominate many market sectors, applying ongoing pressure on local manufacturers (IBISWorld 2025).

In response, the industry has experienced structural change. Domestic businesses are increasingly shifting towards niche, specialised, and high-value production, focusing

on quality, technical capability, flexibility, and responsiveness to market demand (Australian Fashion Council 2023).

Supply chain dynamics are also changing. The COVID-19 pandemic revealed weaknesses in global supply networks, increasing focus on local capability, resilience, and diversification (ForestWorks & Skills Insight 2025).

Technological change is driving transformation. The adoption of digital design tools, automation, advanced materials, and data-driven production systems is reshaping how products are developed and manufactured.

Workforce challenges are a major constraint across all sectors. The industry faces an ageing workforce in many technical and trade occupations and shortages of skilled workers in areas such as pattern making, machining, maintenance and technical production. This is compounded by limited entry-level pathways, declining participation in TCF specific vocational training, and difficulties attracting younger workers to the industry (ForestWorks & Skills Insight 2025). At the same time, skill requirements are changing. There is growing demand for hybrid skill sets that combine traditional craft and technical capabilities with digital skills.

Sustainability and regulatory pressures are also increasingly important. Consumer expectations, government procurement requirements and environmental regulations are driving changes in materials, production processes and supply chain transparency (Australian Fashion Council 2023).

Finally, changing retail and distribution models are shaping the industry. The rise of e-commerce, direct-to-consumer strategies, and niche branding is creating new opportunities for smaller manufacturers and service providers, especially those able to respond quickly to market demand.

1.2.4. Transformation priorities

The transformation of the TCF industry focuses on building a sustainable, resilient, and high-value domestic capability rather than restoring large-scale manufacturing.

A key focus is workforce and skill development. The industry needs investment in entry-level training, upskilling, and reskilling to address skill shortages and support the adoption of new technologies (ForestWorks & Skills Insight 2025).

Adopting advanced manufacturing and digital technologies continues to be a top priority. This includes investing in digital product development and design systems, automation, data-driven planning and production management systems, and flexible manufacturing setups suitable for low-volume, high-mix production.

Strengthening supply chains is just as crucial. The sector depends on complex networks of local and global suppliers, contractors, service providers, and logistics systems. Improved coordination among these components can increase efficiency, reduce risks, and support more flexible production models.

Sustainability and environmental performance are becoming more central to transformation. Businesses are adopting more sustainable materials, reducing waste, improving resource efficiency, and implementing circular production practices. There is also a growing emphasis on traceability and transparency across supply chains (Australian Fashion Council 2023).

Supporting innovation and product development is another priority. The industry's competitiveness depends on its ability to design and develop high-quality, differentiated products. This requires strong linkages between design, materials, production and market insights.

Finally, there is a need to strengthen the commercial positioning of Australian-made products. This includes emphasising quality, durability, compliance, ethical production and supply chain reliability, particularly in procurement-driven markets and premium consumer segments.

1.2.5. Future growth areas

Future growth in the Australian TCF industry is likely to focus on specialised, high-value, and service-oriented segments rather than large-scale manufacturing.

Technical and specialised textiles are a key growth sector. These include products used in construction, healthcare, defence, agriculture, transport, and environmental applications. Demand for high-performance materials is expected to rise, driving innovation in textile manufacturing.

Premium and niche apparel manufacturing continues to be a key growth sector, particularly where design, craftsmanship, and brand identity are essential for creating value. Local production is ideally suited to support small-batch, high-quality, and responsive manufacturing models.

Safety and industrial products, including protective clothing and footwear, offer strong growth prospects. These markets are driven by regulatory demands and the need for durable, compliant, and high-performance products.

Laundry and dry cleaning services are expected to remain a stable and essential part of the industry, with opportunities for growth in large-scale commercial and institutional sectors, especially in healthcare, hospitality, and aged care.

Repair, alteration, and circular economy services are also potential growth areas. Growing emphasis on sustainability and product durability is boosting demand for repair, reuse, and refurbishment services in both clothing and footwear. In addition, the greater emphasis on sustainability is likely to drive increased interest in textile waste recycling and remanufacturing.

Digital and on-demand manufacturing models offer further opportunities. These include mass customisation, small-batch production, and the integration of digital design with flexible manufacturing systems.

Finally, hybrid production models that combine onshore design, development, and prototyping with offshore manufacturing are likely to remain a key feature of the industry. In this context, the competitiveness of Australian businesses will depend on maintaining strong capabilities in design, technical development, prototyping, testing, and short-run production.

Section 2: Apparel manufacturing sector

2.1 Industry definition and scope

The Apparel Manufacturing sector in Australia is a key component of the broader textile, clothing, and footwear sector. Unlike downstream services such as repairs and alterations, which extend the life of existing products, this sector focuses on designing, developing, and producing new garments.

The sector includes both cut-and-sewn garment production and knitted garment manufacturing, as well as specialist functions such as millinery. Cut-and-sewn production involves transforming woven or knitted fabrics into garments through processes such as patternmaking, fabric cutting, sewing and assembly, finishing, and quality control. Knitwear production uses specialised knitting technologies, including flatbed, circular, fully fashioned, and whole-garment machines, to produce garments directly from yarn.

Activities within the sector include product design and development, pattern making and grading, marker making, fabric spreading and cutting, sewing and assembly operations, knitting machine operations, garment finishing and pressing, quality assurance, and packaging and dispatch. Businesses range from small specialist manufacturing workshops and sampling studios to vertically integrated knitwear manufacturers and fashion brands that maintain in-house development and prototype production capability.

Although large-scale garment manufacturing in Australia has declined over recent decades due to globalised supply chains, the country maintains specialised domestic production capabilities in areas such as fashion sampling, uniforms and workwear, technical apparel, and short-run production for Australian fashion brands.

2.2 Economic contribution

Although smaller than the national clothing retail market, the Apparel Manufacturing sector remains vital for supporting employment, technical skills, and product innovation.

The Apparel Manufacturing sector generates about $1.2 billion in revenue annually. According to IBISWorld (2025), this includes women's and girls' wear manufacturing ($557.9 million); men's and boys' wear ($258.1 million); knitted products ($63 million); and sleepwear and infant clothing ($212.7 million). The total is higher when Tailoring and Clothing Accessories Manufacturing is included. This sector produces $1.51

billion in revenue annually, comprising hats and headwear ($401.6 million), tailoring services ($122.3 million), and clothing accessories ($741.2 million).

Employment in apparel manufacturing primarily occurs in specialised, small-scale production settings. Research by IBISWorld (2025) shows that approximately 4,274 people are directly employed in apparel manufacturing roles. According to IBISWorld, this includes women's and girls' wear manufacturing (2175 employees); men's and boys' wear (1008 employees); knitted products (407 employees); and sleepwear and infant clothing (684 employees). The total rises if Tailoring and Clothing Accessories Manufacturing, which employed 7898 workers in 2023-24, is included.

It is important to note that the sector creates additional jobs in related fields such as sampling, product development, contractor networks, and hybrid production models. Recent research by the Australian Fashion Council has shown that traditional industry classifications often underestimate the total apparel manufacturing workforce, because some roles in areas like garment decoration, digital textile printing, and integrated production are categorised within neighbouring industry sectors (Australian Fashion Council (AFC) 2023).

According to IBISWorld, there are about 728 apparel manufacturing businesses operating across Australia. These include specialised garment factories, knitwear producers, fashion sampling studios, and companies producing uniforms, workwear, and technical garments. These are spread across women's and girls' wear manufacturing (502 businesses); men's and boys' wear (91 businesses); knitted products (99 businesses); and sleepwear and infant clothing (36 businesses).

While domestic production remains vital for product development and specialised manufacturing, most clothing sold in Australia is imported. It is generally estimated that less than 5 per cent of clothing consumed locally is produced domestically, with the national clothing retail market valued at around AUD $28.6 billion annually (IBISWorld 2026).

Domestic apparel manufacturing accounts for a small share of total consumption but is crucial to supporting key market segments such as uniforms, workwear, technical apparel, and rapid product development services. Therefore, the sector's economic contribution should be recognised not only through its direct output but also by its role in maintaining industry capacity, fostering innovation, enabling quicker product development, and strengthening supply chain resilience.

2.3 Key trends and drivers

Several trends are influencing the structure and workforce needs of Australia's apparel production and manufacturing sector.

Globalisation remains the key factor shaping the sector. Much high-volume garment manufacturing has shifted overseas, while Australian manufacturers are increasingly

focusing on product development, prototype creation, technical apparel, and smaller production runs for local brands. Technological innovation also plays a key role, with digital patternmaking systems, automated cutting technologies, advanced knitting machinery, and digital product development tools like 3D garment simulation becoming more common in apparel development workflows.

Sustainability concerns are gaining prominence as well. Growing consumer awareness of environmental impacts is driving demand for sustainable fibres, recyclable materials, and more efficient production methods.

Workforce demographics also pose challenges. Many experienced machinists, knit technicians, and patternmakers have left the industry or are nearing retirement, and training pathways into apparel manufacturing remain limited.

2.4 Transformation priorities

Transformation priorities within the apparel manufacturing sector focus on strengthening workforce capability, integrating digital technologies, and supporting advanced manufacturing.

Developing a skilled workforce capable of supporting both traditional garment production techniques and emerging digital technologies is a key priority. Strengthening training pathways for occupations such as sewing machinists, knitting machine operators, garment technicians, and patternmakers is important for maintaining capability.

Another priority is integrating digital technologies across product development and manufacturing processes. Product lifecycle management systems, digital patternmaking tools, automated cutting equipment, and 3D garment visualisation technologies enable faster development cycles and improved collaboration between design and manufacturing teams.

Supporting innovation and advanced manufacturing capability is also increasingly important, particularly in areas such as technical apparel, performance textiles, protective clothing, and advanced knitwear manufacturing.

Finally, improving supply chain coordination is becoming more crucial as many Australian companies adopt hybrid production models that combine local product development with offshore manufacturing.

2.5 Future growth areas

Future growth in the apparel manufacturing sector is expected to focus on specialised, value-added market segments rather than large-scale commodity production.

Potential growth areas include technical and performance apparel, corporate uniforms, protective clothing, and advanced knitwear manufacturing.

Rapid product development services represent another area of opportunity. As fashion cycles accelerate and brands seek faster development timelines, local sampling and prototype manufacturing capabilities are becoming increasingly valuable.

Digital technologies will also shape future growth. Virtual product development, 3D garment simulation, and integrated product lifecycle management systems help companies cut costs and boost collaboration across global supply chains.

Sustainability initiatives and circular economy practices are expected to shape future growth as businesses adopt responsible sourcing and more efficient production systems.

2.6 Occupational framework

The Apparel Manufacturing Occupational Framework (see Table 1) identifies the key occupations that support the apparel manufacturing value chain. The associated skill profiles detail the capability requirements for each occupation, including tasks, technical skills, general skills, emerging skills, and career pathways linked to each role.

Table 1: Occupational Framework and Skill Profiles – Apparel Manufacturing Sector

Function	Occupation and Status		Skill Profile
Management - larger scale	Managing Director / CEO / Owner	Core	CS13
	Director – Operations / COO / General Manager / Operations Manager	Scale dependent	CS05
	Director – Finance and Corporate Services / CFO / Head of Finance / Financial Controller	Scale dependent	CS03
	Director/Manager – Product Design and Development	Scale dependent	CS06
	Manager – Human Resources and Workforce Development	Scale dependent	CS04
	Manager – Risk, Compliance and Sustainability	Scale dependent	CS07
Management - small scale	Owner Operator / Business Proprietor / Workshop Owner / Studio Director	Core	CS44
Digital Systems	Manager – Technology and Digital Systems	Scale dependent	CS09
	IT Systems Support Officer	Scale dependent	CS11
Sales and Customer Service	Manager – Sales and Marketing	Scale dependent	CS08
	Key Account Manager	Scale dependent	CS59
	Sales Representative	Scale dependent	CS58

	Customer Service Officer / Assistant	Core	CS37
Administration	Administration Officer	Scale dependent	CS01
Product Design and Development	Creative Director	Scale dependent	SSAPP03
	Head of Design	Scale dependent	SSAPP11
	Designer - Fashion	Core	SSAPP05
	Designer - Knitwear	Core	SSAPP06
	Technical Designer/Garment Technician	Core	SSAPP26
	Product Developer	Core	SSAPP17
	Patternmaker - Manual	Core	SSAPP15
	Digital Patternmaker	Scale dependent	SSAPP07
	3D Garment Visualisation Specialist	Emerging	SSAPP01
	Sample Room/Design Room Manager	Scale dependent	SSAPP23
	Sample Machinist/Prototype Sewer	Core	SSAPP22
	Fit Coordinator/Fittings Coordinator	Scale dependent	SSAPP08
	Research and Development Coordinator	Scale dependent	SSAPP21
	Yarn Technologist - Knitwear	Scale dependent	SSAPP28
	Grader	Scale dependent.	SSAPP10
Merchandise Planning and Buying	Merchandise Planner	Scale dependent	SSAPP13
	Buyer	Scale dependent	SSAPP02
	Product Manager	Scale dependent	SSAPP19
Supply chain management	Manager - Supply Chain and Procurement	Core	CS56
	Logistics and Compliance Coordinator	Scale dependent	CS62
Production Management [onshore or offshore]	Production Manager	Core	CS18
	Production Planner / Scheduler	Scale dependent	CS19
	Production / Sample Coordinator	Core	CS20
	Offshore Production Coordinator	Scale dependent	CS14
	Supplier Quality / Technical Compliance Auditor	Emerging	CS28
Manufacturing - Cutting and Preparation	Cutter	Core	SSAPP04
	Marker Maker [CAD markers]	Scale dependent	SSAPP12

Manufacturing - Sewing and Assembly	Industrial Sewing Machine Operator	Core	CS84
	Production Team Leader / Line Leader	Scale dependent	CS45
Manufacturing – Printing, Decoration and Surface Finishing	Embroidery Technician	Scale dependent	SSAPP42
	Digital Textile Printer - Apparel	Scale dependent	SSAPP40
	Screen Print Operator - Apparel	Scale dependent	SSAPP41
	Heat Transfer / Heat Seal Operator - Apparel	Scale dependent	SSAPP38
	Label Printing and Application Technician	Scale dependent	SSAPP39
	On Demand Print Operator - Apparel	Scale dependent	SSAPP25
Millinery Production	Milliner / Hat Maker	Scale dependent	SSAPP43
Production Support	Production Assistant	Core	SSAPP20
Knitwear Production	Knitting Machine Operator - Flatbed	Core	SSAPP32
	Digital Knitwear Programmer / Knit CAD Technician	Core	SSAPP29
	Knitting Machine Mechanic	Core	SSAPP31
	Knitting Machine Operator - Circular	Core	SSAPP34
	Knitting Machine Operator - Fully Fashioned	Core	SSAPP35
	Knitting Machine Operator - Whole Garment / Seamless	Scale dependent	SSAPP33
	Linking Operator	Core	SSAPP36
	Garment Dyeing Technician	Scale dependent	SSAPP30
Finishing and Dispatch	Garment Finisher / Quality Finisher	Scale dependent	SSAPP09
	Slitting and Stenting Operator - knitwear	Scale dependent	SSAPP37
	Presser / Steamer	Scale dependent	SSAPP18
	Packer / Dispatch Officer	Scale dependent	SSAPP14
	Washing / Laundry Operator / Dry Cleaning	Scale dependent	SSAPP27
Quality, WHS and compliance	Quality Assurance Coordinator	Core	CS21
	Quality Control Inspector	Core	CS22
	WHS Coordinator	Scale dependent	CS34
	Product Compliance Coordinator	Emerging	SSAPP16
	Maintenance Supervisor	Scale dependent	CS12

Support and maintenance	Sewing Machine Mechanic	Core	CS25
Warehousing	Warehouse and Logistics Supervisor	Scale dependent	CS32
	Warehouse Inventory Controller	Scale dependent	CS33
	Forklift Operator	Scale dependent	CS10
	Pick/Pack Operator	Core	CS17
	Storeperson	Core	CS27
Retail, E commerce and Merchandising	Quality Assurance Coordinator / Officer	Scale dependent	CS23
	Visual Merchandiser	Scale dependent	CS31
	Online Sales / Ecommerce Coordinator	Scale dependent	CS15
	Retail Customer Service Assistant [retail/online]	Scale dependent	CS24
	Social Media Content Creator	Scale dependent	CS39
Sustainability	Sustainability and Circular Economy Specialist	Emerging	CS29

2.7 Scalability

The occupational structure of apparel manufacturing is heavily influenced by business size and the extent of local or offshore production.

In smaller businesses and sampling studios, which are common in Australia, roles are often combined and staff need to be multi-skilled. One person may handle several tasks across product development and production, such as patternmaking, sample sewing, quality checking, and production coordination. In medium-sized manufacturing operations, roles become more clearly separated, with distinct duties in patternmaking, cutting, sewing, quality assurance, and production supervision. In larger organisations and brand-led companies managing offshore manufacturing, additional specialist roles emerge in areas like product development coordination, technical design, supplier quality assurance, compliance, and offshore production management.

The occupational framework can be applied across various business models operating in Australia. The following examples show how the framework might be used in three different types of businesses: a small sampling studio, a hybrid design-led company with offshore production, and an onshore manufacturing operation.

Small apparel businesses and sampling studios make up a significant part of the sector. These enterprises usually run with small teams and focus on design development, prototyping, and limited production. In this model, the occupational framework is applied in a highly integrated way, with multiple roles combined into a few positions. One person may handle responsibilities across product design, pattern

making, sample production, and quality control. For example, a Designer or Product Developer might also manage pattern making and coordinate fittings, while a Sample Machinist may contribute to garment construction, finishing, and basic quality assurance. Production support roles like Production Assistant are often present, but administrative, marketing, and supply chain functions are typically managed by the owner or Lead Designer. Digital roles such as Digital Patternmaker or 3D Garment Visualisation Specialist are less common, though they may be adopted selectively depending on the business's technical capacity. In this model, the framework mainly acts as a capability reference, with skill profiles applied broadly across individuals rather than tied to specific positions.

A second common business model is one where companies combine local product design and development with offshored garment manufacturing. In this model, there is a clearer delineation of functional areas. Core roles such as Designer, Technical Designer/Garment Technician, Product Developer, and Patternmaker remain based in Australia, supported by roles like Production Coordinator and Offshore Production Coordinator to manage supplier relationships and production timelines. Additional scale-dependent roles develop in areas such as merchandise planning, supply chain coordination, and quality assurance. For instance, Supplier Quality or Technical Compliance Auditors may be introduced to ensure offshore production meets the required standards. Digital roles, including Digital Patternmaker and 3D Garment Visualisation Specialist, become increasingly important as businesses adopt technologies to improve communication and reduce sampling cycles. Manufacturing roles like Sewing Technician or Cutter are usually scarce or limited, since production is done offshore. Instead, the emphasis shifts to coordination, technical specifications, and supply chain management.

A third business model involves garment manufacturers operating entirely onshore. These businesses often specialise in producing items like uniforms, workwear, technical apparel, or short-run production for local brands. In this model, roles are clearly defined across the manufacturing value chain. Different positions are found in cutting, sewing, finishing, and quality control, including Cutter, Sewing Technician, Production Team Leader, and Quality Control Inspector. Production management roles are also formalised, with roles such as Production Manager and Production Planner responsible for scheduling, workflow coordination, and setting output targets. Support roles, including Maintenance Supervisor and Sewing Machine Mechanic, are more common due to reliance on in-house equipment. Product development roles focus on sampling and collaborating with local designers. Quality assurance and compliance functions are also more integrated, reflecting the need to meet industry standards and customer specifications.

Section 3: Clothing and footwear repairs and alterations sector

3.1 Industry definition and scope

The Clothing and Footwear Repairs and Alterations sector is a specialised part of the larger textile, clothing, and footwear industry. Unlike manufacturing, which creates new products, this sector focuses on the downstream part of the value chain by extending the life of garments, footwear, and accessories through services like alterations, repairs, restoration, and modifications.
Activities within the industry include clothing alterations and tailoring, garment repairs, footwear repairs and refurbishments, leather goods repairs, and related services such as key cutting, zip replacement, seam reinforcement, and retailing of product care products. The sector consists of a variety of businesses. These include sole traders and small family-run shops, franchise networks and multi-site operators located in shopping centres and retail precincts, as well as repair and alteration units operated by some clothing and footwear manufacturers. It is highly fragmented, mainly composed of micro- and small-sized enterprises, with many owner operators managing technical work, customer service, and administrative tasks themselves.

3.2 Economic contribution

Although smaller in overall economic value compared to larger sectors like apparel manufacturing, the Clothing and Footwear Repairs and Alterations sector plays a vital role in local employment and supporting small businesses. It offers widespread job opportunities across metropolitan, suburban, and regional Australia and helps forge pathways to self-employment. The sector enhances economic resilience by supporting retail supply chains, corporate uniform providers, the bridal and formalwear markets, and consumers seeking to maintain or alter their garments. Revenue streams are generally diverse, including alterations, repair services, specialist restoration work, and the sale of accessories and care products. Additionally, the sector’s influence extends beyond direct earnings, encouraging product longevity and waste reduction, aligned with national sustainability goals.

3.3 Key trends and drivers

Growing awareness of sustainability and waste reduction is boosting demand for repair and refurbishment services. Increasing prices for garments and footwear, along with interest in circular economy principles and the right-to-repair movement, are enhancing the sector's importance.

Meanwhile, the industry faces competition from fast fashion and cheap imports, which can reduce demand for basic repairs in lower-tier markets. However, high-end garments, bridal wear, corporate uniforms, and premium footwear still drive demand for skilled alteration and restoration services.
Technological advancements are also shaping the sector's skill needs. Digital booking systems, POS solutions, inventory management, and online customer communication are common in many businesses. Advancements in industrial sewing and specialised footwear repair machinery are also reshaping the sector's technical skill requirements. Additionally, workforce demographics pose challenges. Many experienced tradespeople are ageing, and formal training options are limited. Skill transfer often occurs informally through on-the-job learning, highlighting the need for more structured entry-level training and skill development for existing workers.

3.4 Transformation priorities

Transformation priorities focus on enhancing workforce skills, creating structured training pathways, and embedding sustainability initiatives. There is a need to attract new entrants to craft-based roles and formalise qualification and micro-credential pathways that develop both traditional technical skills and emerging digital competencies. Developing small-business capabilities remains vital, especially in areas such as financial management, compliance, digital systems integration, and customer engagement. As businesses grow into franchise or multi-site models, roles in management, HR/WHS coordination, systems support, and governance are becoming more specialised. Additionally, embedding circular economy principles into daily operations and promoting repair as a key sustainability service are important transformation goals.

3.5 Future growth areas

Future growth is expected to focus more on specialised, value-added segments rather than high-volume basic services. Promising areas include premium garment and bridal alterations, luxury footwear restoration, orthopaedic and modification services, and certified-sustainability repair options. There is potential for expansion through structured partnerships with fashion brands, retailers, and uniform suppliers, as well as through corporate contracts and franchise network growth. Digital tools, such as online booking and customer engagement platforms, will continue to influence service delivery models. As repair and reuse become more ingrained in consumer habits and policy, the sector’s workforce will evolve to include technical, managerial, digital, and advocacy roles that foster long-term capability and growth.

3.6 Occupational framework

The occupational framework for the clothing and footwear repairs and alterations sector, as shown in Table 2, outlines the industry's main functional areas and associated occupations, linking these to the Skills Register, which offers a detailed Skill Profile for each occupation.

Table 2: Occupational Framework and Skill Profiles – Clothing and footwear repairs and alterations

Function	Occupation	Status	Skill Profile
Management	Owner Operator / Business Proprietor / Workshop Owner / Studio Director	Core	CS44
	Store / Studio Manager	Scale dependent	SSALT14
	Area / Regional Manager	Scale dependent	CS36
	Partnerships and Business Development Coordinator	Scale dependent	CS41
Administration	Administration Officer	Scale dependent	CS01
	Human Resources / Workplace Health and Safety Coordinator	Scale dependent	CS42
Customer Service	Customer Service Officer / Assistant	Scale dependent	CS37
Clothing Alterations and Repairs and Alterations	Alterations and Repairs Specialist [Integrated] - Clothing	Scale dependent	SSALT01
	Alterations Sewing Machinist	Scale dependent	SSALT02
	Tailor (structured garments)	Scale dependent	SSALT11
	Dressmaker (women's wear reshaping)	Scale dependent	SSALT06
	Repair Specialist (zips, seams, reinforcement)	Scale dependent	SSALT13
	Bridal / Formalwear Alterations Specialist	Scale dependent	SSALT04
	Leather / Suede Garment Repair and Alteration Specialist	Scale dependent	SSALT09
	Costume Alteration Specialist [Theatrical Costumes]	Scale dependent	SSALT05
Footwear Repairs and Ancillary Services	Footwear Repairs Technician [Generalist]	Scale dependent	SSALT08
	Ancillary Services Operator [key cutting, accessories and care products]	Scale dependent	SSALT03
Machining	Industrial Sewing Machine Operator	Core	CS84
	Sewing Machine Mechanic	Scale dependent	CS25

Equipment and Systems Support	Footwear Machinery Technician	Scale dependent	SSALT07
	IT / POS System Support Officer	Scale dependent	CS43
	Materials and Components Coordinator	Scale dependent	SSALT10
	Website Manager and Social Media Content Creator	Emerging	CS47
Industry Development and Engagement	Circular Economy and Repair Advocacy Lead	Emerging	CS35
	Training and Standards Lead	Emerging	CS40

3.7 Scalability

The occupational framework reflects the sector's highly fragmented nature, characterised by many micro- and small enterprises, the coexistence of independent owner-operated workshops and multi-site franchises, and the integration of repair and alteration services into some major clothing and footwear manufacturing companies. It recognises that occupational roles are heavily influenced by the size of the enterprise. In sole proprietorships and very small firms, roles are often combined, with individuals managing technical repairs, customer service, administration, and procurement. In larger businesses, roles tend to become more specialised, with new positions in supervision, management, compliance, digital systems support, and workforce development emerging.

Within the framework, occupations are classified into core, scale-dependent, and emerging roles. The only core role identified in this sector is the Owner Operator/Business Proprietor. All other roles depend on scale. As enterprises grow in size or complexity, or as new business structures develop, such as franchises and in-house repair services in clothing and footwear manufacturing firms, additional roles become apparent. Emerging roles reflect broader industry transformation priorities, including sustainability leadership, circular-economy advocacy, training and standards development, and digital-systems support.

Each occupation within the framework is supported by a detailed skill profile. These profiles outline the job purpose, key tasks, critical work functions, technical and generic skills, emerging capabilities, and indicative qualification pathways. Collectively, they provide a reference for workforce planning, training development, and capability building.

The occupational framework is designed to be flexible across all types of business models in the clothing and footwear repairs and alterations industry. In line with the scalability principles in Section 1.7, the framework can be used in both small-scale businesses and larger multi-site or franchise operations, with differences mainly shown in how roles are organised, combined, or specialised.

In owner-operated workshops and small enterprises, which make up the majority of businesses in the sector, the framework is typically applied in an integrated manner. Rather than existing as distinct positions, most occupational roles are combined and performed by a single person or a very small team.

In this model, the Owner Operator plays a key role covering technical, customer service, and administrative duties. This may involve performing repairs, managing customer interactions, overseeing procurement of materials, keeping basic financial records, and conducting local marketing activities. When additional staff are hired, their roles are typically broad, supporting both production and customer service functions.

As a result, the framework acts as a capability reference rather than a positional structure, with skill profiles allocated to a small group of individuals. This mirrors the real-world situation of small business operations, where flexibility, varied skill sets, and task integration are crucial.

In larger enterprises, including franchise networks and multi-site operators, the occupational structure is more defined. As the size and complexity of the business increase, occupational roles become clearer and more specialised, aligning with specific functional areas such as operations, customer service, administration, and systems support.

Technical roles may be split into specific specialisations, such as alterations, footwear repair, or specialist garment work, while dedicated positions emerge in areas such as customer service, inventory coordination, and equipment or systems support. In addition, management and supervisory roles become necessary to oversee operations across multiple sites, supported by formalised processes and performance systems.

Larger businesses also give rise to scale-dependent and emerging roles, including those focused on training and standards, digital systems support, marketing and business development, and sustainability or circular economy initiatives. These roles reflect increasing organisational complexity and the need for consistent service delivery.

In this context, the framework functions as a role-based organisational structure, with each occupation mapped to a defined position supported by a dedicated skill profile.

The ability of the occupational framework to operate across different business scales is a critical feature of its design. It ensures that the same set of skill profiles can support:

- Micro and small enterprises, where roles are combined and capabilities are applied broadly
- Larger organisations, where roles are specialised and aligned to defined functions.

This scalability allows for consistent workforce planning, training design, and capability development across the sector, while keeping flexibility to reflect real-world

business conditions. It also promotes clearer career pathways, enabling workers to move from generalist roles in small businesses to more specialised or managerial positions in larger organisations.

Section 4: Leather manufacturing sector

4.1 Industry definition and scope

The Australian leather industry is a small but strategically important part of the nation's manufacturing sector. It includes two closely connected industries: leather production (tanneries) and leather goods manufacturing (bags, luggage, personal accessories, and saddlery, excluding clothing).

These sectors form an integrated value chain that begins with the recovery of hides and skins from livestock and meat processing industries and extends through tanning, finishing, and the production of high-value consumer and industrial products. This integration builds strong links between upstream processing and downstream manufacturing.

In statistical terms, leather production and leather goods manufacturing, excluding clothing and footwear, are classified under ANZSIC 1320 by the Australian Bureau of Statistics (ABS). Although relatively modest in economic scale compared with other manufacturing subsectors, the leather industry remains significant because of its export exposure, its links to agriculture and regional economies, and the high level of technical and trade skills in its workforce. The industry is characterised by specialised technical processes, capital-intensive tanning operations, and highly skilled craft-based production in leather goods.

4.2 Economic contribution

The leather sector generates approximately $430 million in sales and service income, with industry value added around $158 million (IBISWorld 2025).

Approximately 350–400 businesses operate within the sector. The industry mainly consists of small enterprises, with most having fewer than five employees (IBISWorld 2025). Total employment estimates range from 1,400 to 1,600 staff across the country, resulting in a low average employment size per business and highlighting the sector's fragmented and specialised character (IBISWorld 2025).

Tanneries tend to be fewer but larger and more capital-intensive, often serving export markets. Conversely, leather goods manufacturing is highly fragmented, comprising micro and small businesses focusing on niche, customised, or premium products.

The sector's economic importance extends beyond its size. It supports regional employment, agricultural value chains, exports, and specialised manufacturing skills.

The cluster of technical expertise and skilled labour further enhances its strategic value.

4.3 Key trends and drivers

Leather production (tanning) is geared toward export markets and is influenced by global market trends. Demand is driven by downstream sectors like automotive, furniture, and luxury markets. Operating in a highly regulated environment, the sector requires continuous investment in environmental systems, including wastewater treatment, emissions control, and chemical management.

Leather goods manufacturing faces stiff competition from cheaper imports. As a result, domestic producers focus on differentiating through quality, craftsmanship, customisation, and branding.

Technological advances are crucial across the sector. In tanning, automation, process optimisation, and sophisticated monitoring improve efficiency and compliance. In leather goods, digital design tools, computer-aided design and computer-aided manufacturing (CAD/CAM) systems, and automated cutting enable more flexible and efficient small-batch production.

There is a rising focus on sustainability, traceability, and ethical sourcing. Regulatory and market pressures drive investments in supply chain transparency, certification, and compliance systems.

4.4 Transformation priorities

The sector is going through structural change, shifting from labour-intensive, large-scale production to specialised, high-value manufacturing.

A key priority is workforce renewal. The sector faces an ageing workforce and limited pathways for new workers. Skills are mainly acquired through informal, workplace training, which poses scalability and consistency challenges.

There is an increasing need to blend traditional craft skills with modern technology, including digital design, automation, and environmental management systems.

Small business capability constraints also create challenges, particularly in adopting new technologies, training, and complying with regulations. Supporting these businesses to innovate and adapt is essential for the sector's sustainability.

4.5 Future growth areas

Future growth will probably concentrate on value-added and specialised products instead of volume. Opportunities include premium leather goods, custom saddlery, technical and performance leathers, and repair and refurbishment services.

Sustainability and circular economy practices are expected to become more prominent, involving environmentally certified processes, recycling, reuse, and longer product lifespans.

Export prospects remain strong for high-quality leather and specialised goods, especially in premium market segments.

Overall, the sector's future relies on harnessing its craftsmanship, quality, and expertise while adapting to changing markets, technology, and regulations.

4.6 Leather Production Sector

4.6.1 Occupational framework

Leather production is a complex, process-driven manufacturing activity. It transforms raw hides and skins into finished leather through a series of interdependent stages, including curing and storage, beamhouse operations, tanning, retanning, and finishing. Each stage demands specialised technical skills, chemical control, environmental management capability, and effective quality control.

The sector's occupational framework, as shown in Table 3, recognises that leather production is an integrated system supported by management, technical, compliance, and logistics roles. At its core, the industry relies on skilled production operators involved in curing, beamhouse, tanning, retanning, and finishing stages, assisted by team leaders and production managers. These operational roles are complemented by leather technologists and laboratory technicians who monitor quality and product specifications, ensuring leather meets customer and export standards. Environmental and effluent treatment functions are essential, reflecting the water-intensive and chemically sensitive nature of leather processing. Maintenance roles, such as mechanical fitters and electricians, ensure plant reliability and continuous operation.

The occupational framework also emphasises scale-dependent roles. Smaller leather producers might combine supervisory and planning tasks, while larger facilities are more likely to employ dedicated staff such as production planners, warehouse supervisors, and specialised team leaders for each stage of production. This distinction is significant because occupational structures can vary greatly depending on organisational size, turnover, and operational complexity.

Emerging roles are outlined to mirror the industry's transformation priorities. Increasing regulatory requirements, sustainability demands, and the digitalisation of production systems are driving the need for new skills in areas like sustainability, water quality, automation, Programmable logic control (PLCs), instrumentation, and process chemistry.

Table 3: Occupational Framework and Skill Profiles – Leather Production

Function	Occupation and Status		Skill Profile
Management	Managing Director / CEO / Owner	Core	CS13
	Director – Operations / COO / General Manager / Operations Manager	Scale dependent	CS05
	Director – Finance and Corporate Services / CFO / Head of Finance / Financial Controller	Scale dependent	CS03
Management - small scale	Owner Operator / Business Proprietor / Workshop Owner / Studio Director	Core	CS44
Human Resources and Workforce Development	Manager – Human Resources and Workforce Development	Scale dependent	CS04
	Training and Standards Lead	Scale dependent	CS40
	WHS Coordinator	Scale dependent	CS34
Digital Systems	Manager – Technology and Digital Systems	Scale dependent	CS09
	IT Systems Support Officer	Scale dependent	CS11
	Enterprise Resource Planning (ERP) Support Officer	Scale dependent	CS64
Sales and Customer Service	Manager – Sales and Marketing	Scale dependent	CS08
	Key Account Manager	Scale dependent	CS59
	Sales Representative	Scale dependent	CS58
	Customer Service Officer / Assistant	Core	CS37
Administration	Administration Officer	Scale dependent	CS01
Product Design and Technical Development	Leather Technologist	Core	SSLPR06
	Laboratory Technician	Core	SSLPR07
	Process Chemist / Leather Chemistry Specialist	Emerging	CS68
Production Management	Production Manager	Core	CS18
	Production Planner / Scheduler	Scale dependent	CS19
	Production / Shift Supervisor	Scale dependent	CS46
Supply chain and logistics	Procurement / Supply Chain Specialist	Core	CS38
	Raw hide procurement specialist	Core	SSLPR08
	Logistics and Compliance Coordinator	Scale dependent	CS62

	Warehouse and Logistics Supervisor	Scale dependent	CS32
	Forklift Operator	Core	CS10
	Storeperson	Core	CS27
Leather production	Team Leader - Curing and Storage	Scale dependent	SSLPR13
	Team Leader - Beamhouse	Scale dependent	SSLPR12
	Team Leader - Tanning	Scale dependent	SSLPR15
	Team Leader - Retanning	Scale dependent	SSLPR11
	Team Leader - Finishing	Scale dependent	SSLPR14
	Leather Production Operator - Curing and Storage	Core	SSLPR03
	Leather Production Operator - Beamhouse	Core	SSLPR02
	Leather Production Operator - Tanning	Core	SSLPR09
	Leather Production Operator - Retanning	Core	SSLPR05
	Leather Production Operator - Finishing	Core	SSLPR04
	Production Assistant	Core	CS61
Quality	Quality Assurance Coordinator / Officer	Core	CS23
	Quality Control Inspector	Core	CS22
Environmental compliance and monitoring	Environmental Monitoring Technician	Scale dependent	SSLPR01
	Effluent Treatment Plant Operator	Core	SSLPR10
	Water Quality Technician	Emerging	CS67
	Environmental Performance Coordinator	Emerging	CS69
Engineering and Maintenance	Plant Engineer	Scale dependent	CS02
	Maintenance Supervisor	Scale dependent	CS49
	Maintenance Technician	Core	CS50
	Electrician	Core	CS48
	Automation / PLC Technician	Emerging	CS65
	Instrumentation Technician	Emerging	CS66
Sustainability	Sustainability and Circular Economy Specialist	Emerging	CS29

4.6.2 Scalability

While all leather producers have core functional requirements such as leadership, production, technical, environmental, and corporate services, the specific job roles or occupations within these organisations differ depending on the scale of operation.

In small leather producers, roles are often combined and multi-skilled. In medium-sized operations, functions are distinctly separated. In larger facilities, management layers and specialist technical roles develop to manage the growing complexity and the increasing need to address compliance, sustainability, and new production technologies.

Small leather producers have simplified their organisational structures. The General Manager often merges commercial, operational, and compliance duties. Production Managers usually oversee scheduling, and Team Leaders may serve as leading hands. Operators are multi-skilled across curing, beamhouse, tanning, retanning, and finishing stages. Technical and quality roles are typically integrated within the Leather Technician position, without a dedicated Quality Assurance Officer. Environmental monitoring and WHS duties are frequently combined with management responsibilities. Effluent Treatment Plant (ETP) operations may be managed by trained operators or supported by contractors. Maintenance tasks rely on either one in-house trade-qualified worker or external contractors. Warehouse and logistics functions are often combined, while administrative staff offer versatile support across payroll, finance, and records management.

In medium-sized leather manufacturing plants, key functions are divided. A General Manager oversees the facility and is typically supported by a Production Manager and, in some cases, an Operations Manager. A dedicated Production Planner or Scheduler manages throughput and capacity. Team Leaders supervise major production areas. Operators become more specialised at different stages. Technical roles include a Leather Technician for applied testing, a Quality Assurance Officer for systems governance, and Quality Control Inspectors for product inspection. Environmental Monitoring Technicians and dedicated ETP Operators ensure compliance. A WHS Coordinator role is formalised. Maintenance oversight includes in-house trades supported by preventative maintenance programs. Corporate services are managed by a Finance and Administration Manager, a Sales and Customer Manager, and an emerging Workforce Coordinator position.

Larger leather producers have a layered management structure and specialised technical roles. The General Manager is supported by an Operations Manager and Production Managers overseeing wet-end and finishing operations. Team Leaders manage distinct operational teams. Technical capability is extended to include a Leather Technologist responsible for process optimisation and aligning production with customer specifications. Leather Technicians support testing and process control. Quality Assurance Officers manage systems and audits, while Quality Control

Inspectors oversee grading and release authority. Environmental functions include dedicated monitoring staff. Maintenance teams consist of Mechanical Fitters and Industrial Electricians. Supply chain functions include specialised procurement and warehouse supervision. Corporate services encompass finance management, export sales capability, and formal workforce planning.

Finally, the framework identifies emerging roles that reflect the sector's shift towards higher quality, digital production methods, and sustainability. These include Process Chemist / Leather Chemistry Specialist, Automation / Programmable Logic Controller (PLC) Technician, Water Quality Technician, and Sustainability and Circular Economy Specialist. In smaller enterprises, these skills may be included within existing roles; in larger companies, they might become specialised positions.

In summary, small leather producers compress roles and rely heavily on multi-skilled staff. Medium tanneries separate functions and establish clear supervisory and compliance roles. Large tanneries layer management and introduce specialist technical and governance functions. The underlying occupational framework remains consistent, but its application scales with enterprise size and operational complexity.

4.7 Leather goods manufacturing

4.7.1 Occupational framework

Leather goods manufacturing in Australia involves designing, developing, and producing finished products like bags, wallets, belts, small leather accessories, straps, components, and saddlery and harness items. The industry is influenced by strong import competition in mass-market products, but maintains local expertise in premium, artisanal, and specialised manufacturing, where quality, customisation, quick turnaround, and brand authenticity are highly valued.

This occupational framework concentrates on leather goods and saddlery manufacturing and explicitly excludes leather production, which is covered in section 4.6 of this report, and leather footwear, which is addressed in section 5.

The industry structure is small-scale and business dense. IBISWorld's latest industry profile for the Leather and Leather Substitute Product Manufacturing sector, the IBIS category covering leather goods and saddlery/harness manufacturing while excluding footwear and leather clothing, estimates that 1,451 people were employed in 378 businesses in 2025. This results in an average business size of 3.8 employees. It highlights that the sector is mainly composed of micro and small enterprises, with a smaller number of larger, brand-led manufacturers. Business numbers increased by 0.8% from 2024, and the sector has experienced low net growth in business counts over 2020–2025, indicating a mature industry consolidating around specialised niches and strong brands (IBISWorld 2025).

In the sector, there is demand for multi-skilled roles that can support short production runs, bespoke or made-to-order work, and consistent quality outcomes. At the same time, skill requirements are evolving. Digital design and development tools, improved production planning, tighter product compliance expectations, increasing online sales, and growing sustainability and ethical sourcing requirements are broadening the skills mix needed across the sector. The occupational framework, as shown in Table 4, responds to these realities by mapping the functions necessary to operate a leather goods manufacturing business and the occupations that carry out those functions at various scales of operation.

Table 4: Occupational Framework and Skill Profiles – Leather goods manufacturing

Function	Occupation	Status	Skill Profile
Management - small scale	Owner Operator / Business Proprietor / Workshop Owner / Studio Director	Core	CS44
Sales and Customer Service	Sales, Marketing and E-Commerce Manager	Scale dependent	SSLPR17
	Leather Goods Retail Sales /Customer Service Assistant	Scale dependent	SSLPR18
	Website Manager and Social Media Content Creator	Emerging	CS47
Administration	Manager - Finance and Administration	Scale dependent	CS60
	Administration Officer	Scale dependent	CS01
Digital Systems	IT Systems Support Officer	Scale dependent	CS11
	Enterprise Resource Planning (ERP) Support Officer	Scale dependent	CS64
	CAD Technician	Scale dependent	CS72
	Automated Cutting Operator	Emerging	CS71
	3D Printing / Prototyping Operator	Emerging	CS70
Production Management	Production Manager	Scale dependent	CS18
	Production Planner / Scheduler	Scale dependent	CS19
	Production / Shift Supervisor	Scale dependent	CS46
	Production Team Leader / Line Leader	Scale dependent	CS45
	Procurement / Supply Chain Specialist	Scale dependent	CS38
Product design and development	Leather Goods Designer	Scale dependent	SSLPR19
	Patternmaker / Digital Patternmaker	Scale dependent	CS63

	Sample maker	Scale dependent	SSLPR20
	Industrial Sewing Machine Operator	Core	CS84
Leather goods production	Leather Goods Maker	Core	SSLPR21
	Production Assistant	Scale dependent	CS61
Saddle production	Saddler	Core	SSLPR22
	Saddle Assembler	Scale dependent	SSLPR23
	Saddler - Apprentice / Trainee	Scale dependent	SSLPR24
	Saddle Repairer	Scale dependent	SSLPR25
	Saddle Fitting Specialist	Scale dependent	SSLPR26
	Harness and Tack Maker	Scale dependent	SSLPR27
Quality and compliance	Quality Assurance Coordinator / Officer	Scale dependent	CS23
	Quality Control Inspector	Scale dependent	CS22
	WHS Coordinator	Core	CS34
Logistics and Distribution	Maintenance Technician	Scale dependent	CS50
	Sewing Machine Mechanic	Scale dependent	CS25
Sustainability	Sustainability and Circular Economy Specialist	Emerging	CS29
Logistics and Distribution	Dispatch / Distribution Coordinator	Scale dependent	CS53
	Pick/Pack Operator	Scale dependent	CS17
	Storeperson	Scale dependent	CS27

The Owner Operator / Business Proprietor / Workshop Owner / Studio Director provides leadership and is a key role in the framework. As businesses grow beyond a sole trader setup, a variety of supporting roles develop, including Finance and Administration Manager, as well as positions in sales, marketing, e-commerce, administration, customer service (including retail operations like a factory outlet or showroom), and procurement/supply chain coordination. In small businesses, these roles are often combined; in larger businesses, they tend to be separate positions.

Production covers the core manufacturing tasks. It includes production management and planning (Production Manager and Production Scheduler), as well as product design and technical development roles (Leather Goods Designer, Pattern Maker, and Sample Maker) that turn ideas into manufacturable products. The main production team consists of a Production Team Leader / Line Leader, Leather Goods Maker (handling cutting, skiving and preparation, stitching, assembly, hardware fitting, edge

finishing, and final finishing), and Production Assistants who help maintain workflow, prepare components, and handle packing.

Saddle production is included as a dedicated occupational stream within production and processing, reflecting the specialist nature of equestrian product construction, fit and after-sales service. Most businesses operating in this sub-sector are owner operators or part of a larger leather goods producer. However, there is a small number of medium-sized companies, some of which are adopting new technologies and production-based approaches to saddle making. This stream includes Saddler, Saddle Assembler, Saddler (Apprentice/Trainee), Saddle Repairer, Saddle Fitting Specialist and Harness and Tack Maker roles. Together they cover the full lifecycle of saddlery and tack products, including new build, fitting and adjustment, repair and restoration.

Quality and Compliance provide the system and inspection functions that protect brand value and reduce rework, returns, and safety risk. The framework distinguishes Quality Assurance (systems, procedures, audits, and continuous improvement) from Quality Control (in-process and final inspection) and includes WHS coordination to ensure the safe operation of equipment, the correct handling of chemicals and adhesives, and effective risk management across cutting, stitching, and finishing operations.

Maintenance supports equipment reliability and productivity. Maintenance Technicians and Sewing Machine Technicians maintain and calibrate industrial sewing and specialist leatherworking equipment to protect stitch quality and production throughput. These roles, often filled by contractors, will become increasingly important as firms adopt more automation, higher-speed equipment, and improved quality standards.

Logistics and Distribution encompass inbound receipt and storage of materials and components, internal movement of work-in-progress, and outbound dispatch of finished products. Roles such as Dispatch and Distribution Coordinator, Pick and Pack Operator, and Storeperson support inventory accuracy, traceability, and customer delivery performance—capabilities increasingly enabled by enterprise resource planning (ERP) systems and barcode/ Radio-Frequency Identification (RFID) tracking.

Finally, the framework identifies a set of emerging roles that reflect the sector's shift towards digital and sustainable production, and in some cases, a transition from traditional, slow-craft methods to production-based, hybrid approaches. These include CAD Technician, Automated Cutting Systems Operator, 3D Printing/Prototyping Operator, ERP/Systems Support Officer and Sustainability and Circular Economy Specialist. In smaller enterprises, these capabilities may be embedded within existing roles; in larger enterprises, they may become specialist positions.

4.7.2 Scalability

The occupational framework for leather goods manufacturing applies to businesses of all sizes, but role organisation, combination, and specialisation vary greatly depending on scale.

In owner operator businesses, the framework is highly integrated. The owner often acts as General Manager, handles production—often as a Leather Goods Maker or Saddler—and overseas sales, procurement, quality, and dispatch. Design, sampling, and customer communication are handled within the same role. Responsibilities like quality assurance, WHS, and inventory control are informal but still essential. At this level, the framework operates fully, with multiple roles combined into one or two individuals.

In small businesses, with fewer than five employees, some differentiation appears. A dedicated role such as Leather Goods Maker or Saddler may coexist with a Supervisor or Team Leader, though these roles are often combined. Administrative, retail, or customer service duties may be part-time or shared. Tasks related to quality and compliance become more structured, even if performed by the owner or production manager. As order volume grows, responsibilities for inventory and dispatch become clearer. Multi-skilling persists, but role boundaries start to form.

In medium-sized enterprises, the framework is more explicitly defined. Management, production planning, design, and technical roles are separated. Formal maintenance systems are in place, and logistics roles such as Dispatch and Distribution Coordinator are dedicated. Digital tools like ERP and CAD are more integrated, with roles like CAD Technician and Enterprise Resource Planning Support Officer beginning to emerge.

Across all business sizes, core functions remain the same; what changes is the level of role specialisation, management hierarchy, and system integration needed to support growth, complexity, and compliance.

Section 5: Footwear manufacturing sector

5.1 Industry definition and scope

The Footwear Manufacturing sector is primarily concerned with the design, development, and production of new footwear products, rather than with downstream activities such as repair, wholesale, or retail.

The sector involves manufacturing footwear with leather uppers, specialised footwear such as safety and industrial boots, and footwear with plastic or rubber uppers. It also includes producing components like heels, buckles, and straps, along with related activities such as product design, material sourcing, quality assurance, and distribution.

The sector incorporates a variety of production models, ranging from small-scale specialist workshops and sampling studios to branded manufacturers and companies with vertically integrated operations. While large-scale footwear production has mainly moved offshore, Australia maintains domestic capability in premium leather footwear, safety and industrial footwear, orthopaedic and specialist products, and short-run productions for local brands.

As a result, the sector is increasingly characterised by its focus on high-value, niche manufacturing rather than mass production. Domestic producers compete on quality, durability, compliance, speed to market, and brand value, rather than just price.

5.2 Economic contribution

Although smaller than the national footwear retail market, the Footwear Manufacturing sector remains an important part of Australia's manufacturing landscape.

IBISWorld (2025) estimates that the sector's revenue was $666.5 million in 2024–25, with 1,653 people employed across 137 businesses. The industry has contracted over recent years, with revenue declining at an annual rate of 4.9 per cent over the five years to 2024–25, reflecting pressures from import competition.

Despite this, the sector maintains a relatively strong profit margin due to its focus on premium and specialised products. Revenue mainly comes from leather footwear, followed by specialised footwear and items made from plastic or rubber materials.

Domestic production represents only a small share of total footwear consumption in Australia, with imports accounting for more than 85 per cent of demand. However, the sector's economic impact goes beyond its direct production. It is important for

supporting product development and prototyping, maintaining specialised manufacturing and technical skills, and providing industries such as construction, mining, defence, and emergency services with safe, compliant and durable footwear.

5.3 Key trends and drivers

The performance and structure of Australia's footwear manufacturing sector are influenced by several interconnected trends.

The most significant driver is ongoing import competition. Low-cost imported footwear, particularly from Asia, dominates the domestic market, placing sustained pressure on local manufacturers. This has contributed to declining industry revenue and the exit or consolidation of firms exposed to high-volume, low-margin competitors (IBISWorld 2025).

In response, the industry has shifted towards premium and specialised products. Demand for high-quality, durable, and branded footwear has increased, supporting manufacturers that compete on craftsmanship, performance, and brand reputation rather than price. Well-established Australian brands remain competitive in these segments, especially in leather and safety footwear.

Retail and distribution channels are also evolving. Major retail chains are increasingly sourcing low-cost imports, which reduces demand for domestically made footwear. Meanwhile, specialty retailers, online platforms, and direct-to-consumer models are creating new outlets for high-quality, higher-priced locally produced footwear.

Technological change is a vital driver. The ongoing introduction of CAD designers, digital patternmaking, improved materials testing, and automation reduces product development times and delivers more consistent products. These capabilities are especially significant in small-batch production, prototyping, and regulated product sectors.

Changes in the workforce present additional challenges. The sector relies on specialised skills such as patternmaking, stitching, clicking, and machine maintenance, many of which are declining due to an ageing workforce, limited entry-level training options, and a lack of retraining opportunities for current workers.

Finally, sustainability and procurement requirements are becoming more important. Government procurement policies and consumer expectations around traceability, environmental performance, and circularity are shaping production practices and material choices across the sector. This creates opportunities for Australian manufacturers to develop products that meet the demands of a market increasingly focused on sustainability, circularity, and fair production.

5.4 Transformation priorities

Transformation within the footwear manufacturing sector is focused on building a sustainable, high-value production model rather than re-establishing large-scale manufacturing.

A key priority is reskilling the workforce and building capabilities. The sector relies on specialised technical and trade skills that are becoming increasingly rare. Additionally, there is rising demand for workers with digital skills. Enhancing entry-level training, work-based learning, and reskilling opportunities for current workers is essential to sustain domestic capability.

Investment in advanced manufacturing is another priority. This includes digital product development, pattern digitisation, improved cutting and stitching processes, and production systems suited to low-volume, high-mix manufacturing. These capabilities enable faster response times, improved quality control and reduced reliance on large production runs. However, these skills are in short supply and greater attention will need to be paid to building the skill base of the sector.

Enhancing supply chain integration is also crucial. The sector depends on access to onshore and offshore materials, components, machinery servicing, testing facilities, and contractor networks. Improving coordination across these elements boosts efficiency and resilience.

Sustainability is an increasingly important focus of transformation. Manufacturers are adopting environmentally responsible materials, circular production practices and more transparent supply chains in response to regulatory requirements and consumer demand.

Finally, there is a need to strengthen the commercial value of Australian-made products. This includes positioning domestic production around quality, durability, compliance and supply chain reliability, particularly in procurement-driven markets such as safety footwear and defence supply.

5.5 Future growth areas

Future growth in the footwear manufacturing sector is expected to be concentrated in specialised, high-value segments rather than large-scale production.

Safety and industrial footwear present a significant growth opportunity, driven by demand from construction, mining, logistics, and infrastructure sectors. These markets prioritise durability, compliance, and quick delivery, which suits local manufacturing capacities.

Premium and heritage footwear is another key growth area, particularly where brand value, craftsmanship and being 'made in Australia' are important.

Emerging opportunities also exist in specialist and medically informed footwear, including orthopaedic and customised products, where close interaction between design and end users is required. Defence and emergency-services procurement may also support demand for locally manufactured, specification-compliant footwear.

Sustainability-led innovation represents another growth pathway. Circular design, repair services, and the use of recycled and alternative materials are becoming increasingly important in the buying decisions of both consumers and institutions.

Nevertheless, the sector's future is likely to depend on hybrid production models that combine onshore design with offshore manufacturing. In this context, local companies will need to ensure that they possess world-leading capabilities in design, prototyping, testing, and short-run production.

5.6 Occupational framework

The Footwear Manufacturing Occupational Framework (Table 5) details the roles needed to support the sector's current operating model and future capability requirements.

The framework is organised around functional areas that match the end-to-end footwear value chain, including product design and technical development, production, materials, quality and compliance, maintenance, logistics, and supporting business functions. This structure allows for application across a variety of business models, from small workshops to larger, integrated operations.

The framework captures both craft-based and industrial-production roles as well as emerging occupations driven by digitisation, automation and sustainability. Each occupation has a corresponding Skill Profile, which provides more information about the role, including key technical and generic skill requirements.

Table 5: Occupational Framework and Skill Profiles – Footwear manufacturing

Function	Occupation		Skill Profile
Management - larger scale	Managing Director / CEO / Owner	Core	CS13
	Director – Operations / COO / General Manager / Operations Manager	Scale dependent	CS05
	Director – Finance and Corporate Services / CFO / Head of Finance / Financial Controller	Scale dependent	CS03
Management - small scale	Owner Operator / Business Proprietor / Workshop Owner / Studio Director	Core	CS44
Human Resources and Workforce Development	Manager – Human Resources and Workforce Development	Scale dependent	CS04

	Training and Standards Lead	Scale dependent	CS40
Digital Systems	Manager – Technology and Digital Systems	Scale dependent	CS09
	IT Systems Support Officer	Scale dependent	CS11
	Enterprise Resource Planning Support Officer	Scale dependent	CS64
Sales and Customer Service	Manager – Sales and Marketing	Scale dependent	CS08
	Key Account Manager	Scale dependent	CS59
	Sales Representative	Scale dependent	CS58
	Customer Service Officer / Assistant	Core	CS37
Administration	Administration Officer	Scale dependent	CS01
Product Design and Technical Development	Footwear Designer	Core	SSFOT04
	Product Developer	Core	SSFOT12
	Patternmaker / Digital Patternmaker	Core	CS63
	Technical Developer	Scale dependent	SSFOT14
	Prototype Maker	Core	SSFOT13
	CAD Technician	Core	SSFOT02
	3D Footwear Modelling Technician	Emerging	SSFOT19
Supply chain management	Manager - Supply Chain and Procurement	Core	CS56
	Logistics and Compliance Coordinator	Emerging	CS62
Production Management [onshore or offshore]	Production Manager	Core	CS18
	Production Planner / Scheduler	Scale dependent	CS19
	Offshore Production Coordinator	Scale dependent	CS14
	Supplier Quality / Technical Compliance Auditor	Emerging	CS28
	Senior Production Technician	Scale dependent	SSFOT16
Industrial [machine based] production	Footwear Machine Operator - cutting	Core	SSFOT06
	Footwear Machine Operator - closing	Core	SSFOT05
	Footwear Machine Operator - lasting and assembly	Core	SSFOT09

	Footwear Machine Operator - finishing	Core	SSFOT07
	Footwear Machine Operator - General	Core	SSFOT08
	Production assistant	Core	SSFOT10
Craft [artisanal] production	Shoe and boot maker	Core	SSFOT17
	Shoe and boot maker apprentice	Scale dependent	SSFOT18
	Repair and modification specialist	Scale dependent	SSFOT15
Materials technology	Materials technologist	Scale dependent	SSFOT11
	Adhesives / compounds specialist	Scale dependent	SSFOT01
	Chemical compliance specialist	Scale dependent	SSFOT03
Quality, safety and compliance	Quality Assurance Coordinator / Officer	Core	CS23
	Quality Control Inspector	Core	CS22
	WHS Coordinator	Core	CS34
Maintenance and technical support	Maintenance Supervisor	Scale dependent	CS12
	Maintenance Technician	Core	CS50
	Sewing Machine Mechanic	Scale dependent	CS25
	Electrician	Scale dependent	CS48
Logistics and Distribution	Warehouse and Logistics Supervisor	Scale dependent	CS32
	Forklift Operator	Core	CS10
	Storeperson	Core	CS27
	Warehouse Inventory Controller	Scale dependent	CS33
	Dispatch / Distribution Coordinator	Scale dependent	CS53
Sustainability	Sustainability and Circular Economy Specialist	Emerging	CS29

5.7 Scalability

The Footwear Manufacturing Occupational Framework is designed to be adaptable across the diverse range of business models in the footwear manufacturing industry. It acknowledges that the sector includes small owner-operated workshops, specialised sampling studios, and larger, vertically integrated businesses, each requiring different mixes of roles and skills.

In small-scale operations and workshops, tasks are usually highly combined, with a small number of workers handling multiple functions. In these settings, core roles like owner operator, patternmaker, prototype maker, and production worker are often merged, with individuals responsible for design, development, and production. The framework supports this arrangement by identifying key occupations that can be applied flexibly and combined into multi-skilled roles, reflecting the realities of small business operations.

In medium-sized enterprises, functional separation is more pronounced, especially across product development, production, and supply chain activities. Roles such as production planner, logistics coordinator, quality assurance officer, and technical developer become more distinct, allowing for greater efficiency and specialisation. At this level, scale-specific roles start to emerge, supporting structured workflows and better coordination throughout the value chain.

In larger or more complex organisations, including those operating hybrid onshore/offshore production models, the framework encourages a higher level of specialisation and role differentiation. Dedicated management, technical, and compliance functions are necessary to oversee design, sourcing, production, and distribution across multiple sites. Roles like offshore production coordinator, supply chain manager, technical compliance auditor, and digital systems manager become vital for maintaining quality, consistency, and regulatory standards.

The framework also accounts for the growing influence of digital technologies and advanced manufacturing across all business sizes. While smaller businesses may adopt digital tools flexibly, larger organisations are more likely to create dedicated roles for digital product development, systems management, and data-driven production planning. The emerging roles outlined in the framework provide pathways for businesses to develop these capabilities over time.

Most importantly, the framework's scalability supports workforce development and career advancement. It enables workers to move from generalist, multi-skilled roles in smaller operations to more specialised technical or managerial roles in larger organisations. This flexibility benefits both individual career paths and the sector’s long-term growth.

Section 6: Dry cleaning and laundry industry

The dry cleaning and commercial laundry sectors are distinct yet closely linked parts of Australia’s broader textile, clothing, and footwear industry. Although they differ in service approaches, customer bases, and operational characteristics, with dry

cleaning mainly a retail, customer-facing service, and commercial laundry predominantly a B2B, high-volume processing operation, they are officially categorised within the same sector.

Both sectors are classified under the Australian Bureau of Statistics (ABS) industry category ANZSIC Class 9531 Laundry and Dry Cleaning Services. This classification shows that the ABS does not treat dry cleaning and laundry as separate sectors but as parts of a broader textile care system that supports households, businesses, and institutions across Australia. The shared classification reflects common functions such as textile processing, cleaning technologies, finishing, quality control, logistics, and customer service, while also recognising the important differences in scale, production methods, and market focus between the two subsectors.

Understanding this structure is important when examining workforce statistics and occupational structures across the dry cleaning and laundry sectors. Although both sectors operate within the same industry framework, their occupational structures vary considerably due to differences in operational scale, degree of automation, service delivery models, and client requirements.

The following sections outline the occupational structure of the dry cleaning and laundry sectors separately, while acknowledging their common roots within the broader Laundry and Dry-Cleaning Services industry.

6.1. Dry cleaning sector

6.1.1 Industry definition and scope

The dry cleaning sector includes garment intake and assessment, stain removal, cleaning, drying, pressing, finishing, inspection, packaging, customer collection, and in some businesses, pickup and delivery. Many dry cleaners also provide alterations, repairs, wedding dress preservation, doona and household textile cleaning, and specialised care for delicate fabrics, leather, suede, or high-value garments.

According to the Australian Bureau of Statistics industry classification, dry cleaning falls under ANZSIC Class 9531 Laundry and Dry Cleaning Services, which also includes laundry services and linen or uniform hire. As such, dry cleaning is officially recognised as part of a broader category of textile care services rather than a standalone industry.

The sector differs from commercial laundry. Most businesses are small, customer-facing operations with one plant and either a shopfront or agency outlet. The Drycleaning Institute of Australia's (DIA) 2025 survey indicates that 53% of stores are in capital cities and 47% in regional areas, showing that the sector is spread across both metropolitan and regional Australia. The same report shows that 72% of operators run a single store, while a smaller proportion operate multi-store networks,

with an average of 1.7 stores per operator. These findings emphasise that dry cleaning is mainly a small-business sector with a local service presence.

6.1.2 Economic contribution

The dry cleaning sector is part of the wider Laundry and Dry cleaning Services industry, which IBISWorld estimates to be worth approximately $2.5 billion in December 2025. It provides employment for around 16,467 people across roughly 5,370 businesses. IBISWorld also notes that the typical business in this sector employs about 3.1 staff, highlighting the significance of small operators. ABS and IBISWorld do not publish dry cleaning-only data separately.

IBISWorld has published a separate estimate for Commercial Laundries in Australia. In its December 2025 report, IBISWorld projected that the Commercial Laundries sector in Australia will generate between $1.2 billion and $1.5 billion in annual turnover in 2026, with 842 businesses employing between 8,000 and 12,000 workers.

This indicates that the remaining Laundry and Dry Cleaning Services sector, including smaller laundry businesses and dry cleaners, is valued at approximately $1.2 billion and consists of around 4,500 firms employing between 4,000 and 8,000 staff. The Dry Cleaning Institute's 2025 survey offers a more sector-specific view on business sizes. The survey shows that 32% of participating businesses reported annual sales under $250,000, 24% reported between $250,000 and $650,000, another 24% reported between $650,000 and $1 million, and a smaller percentage reported sales above $1 million. The survey also provides information on average costs and margin ranges for dry cleaning businesses, including gross wages, which typically make up 30% to 50% of sales, average rent at 8.38% of sales, and electricity costs averaging between 2.5% and 5% of sales, with gas averaging around 4%. The reported average net profit was 21.86%, although there was broad variation among respondents. These figures highlight a sector mainly composed of small firms facing considerable cost pressures, particularly in labour, rent, and utilities. The Report shows that 44% of dry cleaning stores employ 1–5 staff and 32% employ 6–12 staff, confirming the dominance of small enterprises. At the same time, the sector maintains a strong regional service presence, which is important because dry cleaning often acts as a local convenience service rather than a centralised industrial process.

Overall, the dry cleaning sector’s economic contribution is best seen as a dispersed network of small businesses that support garment care and local jobs across metropolitan and regional Australia, rather than as a high-volume industrial service.

6.1.3 Key trends and drivers

Several structural trends are shaping the dry cleaning sector and affecting the sector's skill requirements.

Changes in dress habits and consumer behaviour are major drivers of demand. Formal business wear has declined, reducing demand for traditional suit cleaning,

while demand has become more dependent on convenience, quality, specialty garment care, and household textile cleaning.

Technological change is also influencing the sector. The adoption of alternative cleaning technologies, including hydrocarbon solvents and wet cleaning systems, is enabling businesses to reduce environmental impact and comply with regulatory requirements related to chemical use and emissions. The DIA's 2025 survey shows that 28% of respondents use perchloroethylene (PERC) exclusively, 12% rely solely on wet cleaning, and 60% employ both PERC and wet cleaning, demonstrating that the sector already utilises mixed cleaning systems rather than depending on a single traditional solvent model. This reflects broader industry pressure to adopt cleaner technologies and more adaptable garment care systems.

Environmental and regulatory pressures are considerable. Solvent management, emissions control, waste handling, and workplace safety continue to shape investment choices and operational systems. The sector faces stricter regulations on solvent use, especially PERC, leading to investments in safer, more sustainable cleaning technologies and improved workplace safety measures. These pressures are particularly important for older businesses upgrading equipment or improving compliance systems.

Workforce characteristics reflect the sector's small-business nature. Many businesses operate with small teams performing multiple roles across customer service, cleaning, finishing, and administration. There is a reliance on older, experienced operators and migrant labour with practical, hands-on skills. The skill challenge confronting the sector is compounded by a lack of formal entry-level training pathways.

The sector also demonstrates strong signs of business maturity. The Survey shows that 32% of respondents have been in business for 0–5 years, 28% for 6–15 years, 20% for 16–30 years, and 16% for 31+ years. This indicates a diverse industry profile, blending newer entrants with long-established family and owner-operated businesses.

Competition from alternative garment care solutions, including home laundering, disposable fashion trends, and new service models, is also influencing demand.

6.1.4 Transformation priorities

Transformation priorities in the dry cleaning sector focus on enhancing business resilience, modernising cleaning systems, strengthening workforce skills, and meeting environmental and customer-service standards.

A key priority is advancing ongoing efforts to adopt more sustainable and compliant cleaning systems. This includes upgrading plant and equipment, implementing wet cleaning where appropriate, managing solvent use more efficiently, and improving environmental performance. The current mix of PERC and wet cleaning systems indicates that many businesses are already transitioning, but capability and investment gaps are inconsistent across the sector.

Service innovation remains a key focus. Since dry cleaning is mainly a retail service, businesses must compete through convenience, reliability, quick turnaround, garment care quality, and customer experience. Pickup and delivery, online bookings, SMS updates, service bundles, and enhanced customer relationship management are becoming more vital for maintaining market share.

Workforce skill development is also crucial. In small dry cleaning businesses, staff often take on multiple roles, including customer intake, stain spotting, machine operation, finishing, packaging, and basic administration. This means training needs are broad, covering garment identification, textile care, spotting chemistry, equipment operation, quality control, retail communication, and safe handling procedures.

Operational efficiency is crucial because many businesses operate on a small scale with limited staff. The DIA's 2025 report shows that most operators work within standard retail hours, typically from 8am to 5pm, while production usually lasts for 5–7 hours or 8–10 hours per day, depending on the size of the business and workflow. These conditions emphasise the need for streamlined workflow design, optimal equipment usage, and labour productivity in small plant settings.

Finally, succession planning and business continuity are critical areas of transformation. Like many small service sectors, the dominance of owner-operated businesses and an ageing business-owner demographic means that long-term sustainability depends on attracting new entrants, updating business models, and supporting generational change.

6.1.5 Future growth areas

Future growth in the dry cleaning sector is likely to stem from specialisation, convenience, and service diversification, rather than from large-scale volume expansion.

Key growth areas include specialty garments and household textile care. High-value items such as formalwear, wedding attire, doonas, curtains, delicate fabrics, and premium textile care offer dry cleaners an opportunity to differentiate themselves from general laundry and domestic cleaning services. The pricing and service mix shown in the DIA's report indicates that these niche categories remain commercially significant. Another promising growth area is convenience-based service delivery. Digital ordering, pickup and delivery, and integrated customer communication tools are set to become more important, particularly in urban markets where convenience and quick service are major buying factors.

Environmentally sustainable cleaning systems such as wet cleaning, liquid carbon dioxide, silicone-based solvents, and biodegradable solvent systems are also likely to become a more significant source of competitive advantage. Operators who invest in newer cleaning systems, safer chemical management, and clearer sustainability

positioning may be better placed to meet changing regulatory requirements and customer expectations.

There is also potential for growth in a range of business-to-business niches, such as uniforms, boutique hospitality, theatrical garments, and corporate garment care. However, these opportunities are likely to remain smaller in scale compared to the institutional linen contracts seen in commercial laundry.

Overall, the dry cleaning sector is expected to remain dominated by small and medium sized enterprises, with growth focused on service quality, local convenience, technical garment care, and gradual technology adoption, rather than on consolidation into large-scale operators.

6.1.6 Occupational framework

The occupational framework for the dry cleaning sector, as shown in Table 6, outlines the occupations across all operational levels, from small owner-operated businesses to larger, multi-site companies. The framework is based on key functional areas, including management, garment processing, and customer service and retail operations. It identifies the occupations associated with each core function and connects each occupation to the relevant Skill Profile in the Skill Register.

Table 6: Occupational Framework and Skill Profiles – Dry cleaning

Function	Occupation and Status		Skill Profile
Management - multi-site operations	Managing Director / CEO / Owner	Core	CS13
	Director – Operations / COO / General Manager / Operations Manager	Scale dependent	CS05
	Area / Regional Manager	Scale dependent	CS36
Management - single site operations	Owner Operator / Business Proprietor / Workshop Owner / Studio Director	Core	CS44
Customer service and retail operations	Customer Service / Front Counter Assistant	Core	SSDCL11
	Marketing and Local Area Promotions Coordinator	Scale dependent	SSDCL24
	E-Commerce Coordinator	Emerging	CS30
Production Management	Production Manager	Scale dependent	CS18
	Production / Shift Supervisor	Scale dependent	CS46
Garment Processing	Dry Cleaner / Garment Processing Technician	Core	SSDCL01
	Spotter / Stain Treatment Specialist	Core	SSDCL02

	Pressing / Finishing Technician	Core	SSDCL03
	Laundry Operator [Dry cleaning]	Scale dependent	SSDCL04
	Production Assistant [Dry cleaning]	Scale dependent	SSDCL05
Alterations	Alterations and Repairs Specialist [Integrated] - Clothing	Scale dependent	SSALT01
Quality, Compliance and Environmental Management	Quality Control Inspector	Scale dependent	CS22
	Health, Safety and Environment Coordinator	Core	CS52
Engineering and Maintenance	Dry Cleaning Equipment Technician	Core	SSDCL06
	Boiler Operator	Core	SSDCL12
	Dry Cleaning Automation / Systems Technician	Emerging	SSDCL07
Logistics and Distribution	Driver	Core (Pick Up and Delivery model)	CS55
	Dispatch / Garment Tracking Officer	Scale dependent	SSDCL10
	Fleet Manager	Scale dependent	CS54
Digital Systems and Administration	POS and Garment Tracking Systems Administrator	Scale dependent	SSDCL08
	IT Systems Support Officer	Scale dependent	CS11
	Administration Officer	Scale dependent	CS01
	Human Resources / Workplace Health and Safety Coordinator	Scale dependent	CS42
Sustainability	Sustainable Cleaning Systems Specialist	Emerging	SSDCL09
	Sustainability and Circular Economy Specialist	Emerging	CS29

6.1.7. Scalability

The occupational structure of dry cleaning businesses is mainly determined by the size of their operations, with clear distinctions between most single-store operators (72%) and the smaller group of multi-site networks. The occupational framework recognises the differences between multi-skilled, overlapping roles in small businesses and specialised, layered roles in larger companies.

As illustrated in Figure 1, in single-store operations, staffing tends to be lean, with roles combined. Key functions such as customer service, garment processing, basic compliance, and equipment maintenance are managed by a small team, often with

the owner directly involved in daily tasks. Many scale-dependent roles identified in the framework are either missing or incorporated into broader positions.

In contrast, multi-site operations develop functional specialisation, management layers, and support roles. As business complexity increases, with multiple locations, higher volumes, logistics, and workforce coordination, distinct roles emerge in management, production oversight, administration, and logistics. This results in a more formalised organisational structure with clearer job boundaries and reporting lines.

Figure 1:Scaling of the Occupational Framework – Single-Site and Multi-Site Dry Cleaning Operations

Single-site Dry Cleaning	Multi-site Dry Cleaning Operation
• Owner Operator (hands-on; oversees operations, finances, staff) • Customer Service / Front Counter Assistant (may also handle basic admin and marketing) • Dry Cleaning Technician (multi-skilled across cleaning, spotting, and finishing - role may be performed by Owner/Operator)	Management • Owner / General Manager • Operations Manager (oversees plant and retail network) • Area / Regional Manager (if franchise or dispersed sites) Customer Service and Retail • Customer Service Assistants (across multiple stores) • Marketing / Promotions Coordinator • E-commerce Coordinator (for online orders and bookings) Production Management • Production Manager (central plant) • Production Supervisors / Shift Supervisors Garment Processing • Dry Cleaning Technicians (role differentiation by task or specialisation) • Dedicated Spotter / Stain Treatment Specialist • Pressing / Finishing Technicians • Production Assistants Alterations • Clothing Alterations Specialist (in-store or centralised) Quality and Compliance • Quality Inspection Officer • Health, Safety and Environment Coordinator Logistics and Distribution • Drivers (pick-up and delivery routes) • Dispatch / Garment Tracking Officer • Fleet Coordinator

	Maintenance and Technical • Dry Cleaning Equipment Technician • Boiler Operator • Automation / Systems Technician (in advanced operations) Administration and Systems • POS / Garment Tracking Systems Administrator • Finance and Administration Officer • HR / Workforce Coordinator • IT Support

Differences in the scale of operations shape how dry cleaning businesses organise their workforce, with distinct structural characteristics evident between single-store and multi-site models.

Smaller, single-site businesses typically operate with a generalist, owner-driven structure, where roles are combined and staff perform multiple functions. In contrast, larger, multi-site operations support a more specialised and systematised structure, with clearer role delineation and functional separation. Larger-scale operations are able to support:

- greater operational efficiency through role specialisation
- improved compliance and quality through dedicated oversight roles
- broader service offerings (e.g., logistics, e-commerce, alterations)
- increased adoption of new technologies and sustainability practices

At the same time, this larger scale brings increased organisational complexity, demanding more formal management structures, coordination mechanisms, and support systems.

6.2. Commercial and industrial laundry sector

6.2.1 Industry definition and scope

The commercial and industrial laundry sector provides laundering, linen hire, and textile management services to business and institutional clients. Unlike household laundry services or retail dry cleaning, which mainly serve individual consumers, this sector provides business-to-business services to other sectors such as healthcare, aged care, hospitality, and industrial services.

The sector involves processing flat linen such as sheets, towels, and table linen, as well as garments including uniforms and workwear, and specialised textiles that require strict hygiene standards. Operations typically feature high-volume, continuous processing systems supported by logistics networks that collect soiled linen from client sites and deliver clean linen on a scheduled basis.

Core activities include the collection and transport of linen, soil sorting and classification, washing and disinfection, drying, finishing (including ironing and folding), inspection and repair, packing and dispatch, and redistribution to customers. Many businesses also provide linen rental and lifecycle management services, including procurement, inventory control, and replacement of textile assets.

Commercial laundry operations vary from small, single-site laundries serving local hospitality businesses to large, multi-site industrial operations managing national contracts with hospitals, hotel groups, and aged care providers. Large-scale operators often run continuous, multi-shift processing facilities with integrated logistics systems and advanced equipment such as tunnel washers, automated finishing lines, and linen tracking technologies.

6.2.2 Economic contribution

The commercial laundry sector is a specialised yet essential component of Australia's broader service sector, supporting key industries such as healthcare, tourism, and aged care.

As indicated in the preceding section of this report, the Australian Bureau of Statistics classifies laundry services under ANZSIC Class 9531 Laundry and Dry Cleaning Services, which includes dry cleaning, and does not publish separate data on the commercial and industrial laundry sector. However, it is estimated by IBIS World that the commercial laundry sector earns around AUD $1.2–$1.5 billion each year, accounting for a significant part of the larger laundry and dry cleaning market valued at over AUD $2 billion. Employment in this sector is estimated at about 8,000–12,000 workers, with additional roles created in related logistics and support services. The industry structure consists of a few large operators along with many small and medium-sized enterprises. Large organisations run multi-site networks in major cities and regional centres, while smaller laundries usually serve local hospitality or community clients.

Although less visible than retail-facing sectors, the industry provides vital infrastructure services to hospitals, aged care facilities, accommodation providers, and industrial operations.

6.2.3 Key trends and drivers

Several structural trends are shaping Australia's commercial laundry sector and affecting workforce requirements.

Demand from the healthcare and aged care sectors is a main driver of activity. An ageing population and rising demand for healthcare services continue to boost linen processing volumes, especially for facilities that require strict infection-control standards.

Outsourcing trends are also noteworthy. Many hospitals, hotels, and aged care providers have shifted from in-house laundry services to contracted commercial providers, driving industry consolidation and growth.

Technological advances are transforming production processes. Major operators are investing in continuous batch washing systems, automated sorting and finishing equipment, and digital tracking technologies like RFID to boost efficiency, reduce labour demands, and enhance linen lifecycle management.

Sustainability pressures are increasing across the whole industry. Water use, energy consumption, and chemical management remain top operational concerns, leading to investments in resource-efficient technologies and environmental compliance measures.

Workforce characteristics also shape the sector. The industry relies heavily on a labour-intensive workforce performing repetitive, process-driven tasks, with many workers from culturally and linguistically diverse backgrounds. At the same time, there is growing demand for skilled roles in maintenance, logistics, and supervision.

6.2.4 Transformation priorities

Priorities for transformation in the commercial laundry industry include improving operational efficiency, developing workforce capability, and complying with environmental and regulatory standards.

Developing workforce skills remains a key priority. This includes supporting entry-level workers in production roles and creating pathways to supervisory, maintenance, and logistics positions. Training in areas such as equipment operation, workplace safety, infection control, and team leadership is vital to maintain high productivity and uphold service quality.

Adopting new technology remains a key focus. Investing in automation, digital systems, and linen tracking boosts throughput, cuts down manual handling, and improves inventory visibility across supply chains.

Enhancing logistics and supply chain coordination is crucial. Effective collection and delivery systems support dependable service, especially for healthcare and hospitality clients working to tight schedules.

Sustainability and environmental performance are becoming more important. Businesses are investing in water recycling, energy-efficient equipment, and improved chemical management to reduce environmental impacts and comply with regulations.

Finally, workplace practices and staff retention remain priorities, considering the physically demanding nature of many roles and ongoing labour shortages in some regions.

6.2.5 Future growth areas

Key growth in the commercial laundry industry is expected to come mainly from healthcare, aged care, and large accommodation providers, rather than from small retail services.

Healthcare linen services represent a significant growth area, particularly in infection-controlled settings supporting hospitals and aged care facilities. Additionally, growth in tourism and accommodation will further increase demand for hospitality linen services.

Technological progress will continue to shape industry development. Greater use of automation, robotics, and data-driven systems should enhance productivity and reduce reliance on manual labour across various functions, while increasing demand for technical and maintenance skills.

Digital linen tracking and asset management are additional growth areas, providing improved linen inventory control and helping to reduce losses across extensive client networks.

Sustainability measures and circular economy practices are likely to shape future growth. These include more focus on textile reuse, recycling, and more efficient resource use.

Overall, the industry is moving toward larger, more integrated service providers with advanced processing capabilities, while smaller operators will continue to serve local and niche markets.

6.2.6 Occupational framework

The occupational framework for the laundry sector, as shown in Table 7, details all occupations within the sector, from small owner-operated laundries to large, multi-site industrial providers. The framework highlights the sector's main functional areas and corresponding occupations and links these to the Skills Register, which provides a detailed Skill Profile for each occupation.

Table 7: Occupational Framework and Skill Profiles – Laundry

Function	Occupation and Status		Skill Profile
Management - larger operations	Managing Director / CEO/ Owner	Core	CS13
	Director – Operations / COO / General Manager / Operations Manager	Scale dependent	CS05
	Director – Finance and Corporate Services / CFO / Head of Finance / Financial Controller	Scale dependent	CS03
	Manager – Human Resources and Workforce Development	Scale dependent	CS04

	Manager – Risk, Compliance and Sustainability	Scale dependent	CS07
	Area / Regional Manager	Scale dependent	CS36
Management - small operations	Owner Operator / Business Proprietor / Workshop Owner / Studio Director	Core	CS44
Finance and Administration	Manager - Finance and Administration	Scale dependent	CS60
	Administration Officer	Core	CS01
Digital Systems	Manager – Technology and Digital Systems	Scale dependent	CS09
	IT Systems Support Officer	Scale dependent	CS11
	ERP / Laundry Management Systems Support Officer	Scale dependent	SSDCL28
	RFID / Linen Tracking Specialist	Scale dependent	SSDCL13
Sales and Customer Service	Manager – Sales and Marketing	Scale dependent	CS08
	Key Account Manager	Scale dependent	CS59
	Sales Representative	Scale dependent	CS58
	Customer Service Officer / Assistant	Core	CS37
Supply Chain and Linen Management	Manager - Supply Chain and Procurement	Scale dependent	CS56
	Procurement / Purchasing Officer	Scale dependent	CS57
	Linen and Inventory Coordinator	Scale dependent	SSDCL14
	Dispatch / Distribution Coordinator	Core	CS53
	Fleet Manager	Scale dependent	CS54
	Driver	Core	CS55
Production Management	Production Manager	Scale dependent	CS18
	Production / Shift Supervisor	Core	CS46
	Production Planner / Scheduler	Scale dependent	CS19
	Production Team Leader	Core	CS45
Laundry Operations	Laundry Worker - Soil Sort	Core	SSDCL15
	Laundry Worker - Washroom	Core	SSDCL16
	Laundry Worker - Flatwork Finishing	Core	SSDCL17
	Laundry Worker - Finishing / Hanging / Folding	Core	SSDCL18
	Laundry Worker - Packing and Dispatch	Core	SSDCL19

	Laundry Worker - Advanced Machine Operator	Scale dependent	SSDCL20
	Laundry Worker - Mending and Repairs	Core	SSDCL29
	Linen Porter	Core	SSDCL21
Quality, Safety and Infection Control	Quality Assurance Manager	Scale dependent	CS51
	Infection Control Coordinator	Scale dependent	SSDCL22
	Health, Safety and Environment Coordinator	Scale dependent	CS52
Engineering and Maintenance	Plant Engineer	Scale dependent	CS02
	Maintenance Supervisor	Scale dependent	CS49
	Maintenance Technician	Core	CS50
	Boiler Operator	Core	SSDCL12
	Electrician	Scale dependent	CS48
	Laundry Automation Technician / Control Systems Technician	Emerging	SSDCL23
Sustainability	Sustainability and Circular Economy Specialist	Emerging	CS29
On demand laundry collection and pick up service	On Demand Laundry Dispatch Coordinator	Scale dependent	SSDCL25
	On Demand Laundry Customer Service Officer	Core	SSDCL26
	On Demand Laundry Driver-Operator	Core	SSDCL27

6.2.7 Scalability

Within each function, occupations are categorised as either Core, Scale-dependent, or Emerging. Core occupations are those vital to all commercial laundry operations regardless of size, such as production workers, drivers, dispatch coordinators, supervisors, and basic administrative support. Scale-dependent roles are typically found in larger or more complex organisations, especially those managing multiple sites, high-volume processing plants, or servicing healthcare and hospitality contracts. Emerging roles indicate areas of growing importance, such as automation, digital systems, and sustainability.

The laundry sector is a labour-intensive, process-driven service sector supported by logistics and maintenance functions. At its core is the operational workforce, which includes workers engaged in soil sorting, washroom, finishing, repair, and dispatch operations. These roles, carried out by laundry workers and overseen by team leaders and supervisors, are found in laundries of all sizes.

As depicted in Figure 2, the occupational framework can be scaled across commercial laundry operations of different sizes and complexities, from owner-operated laundries to large multi-site industrial providers.

Figure 2: Scaling of the Occupational Framework Across Laundry Operations by Business Size

Owner - Operated Laundry	Medium Laundry	Large Laundry
• Owner Operator • Laundry Workers - multi-task • On Demand Laundry Collection and Pick Up Service • Owner Operator • On Demand Laundry Dispatch Coordinator • On Demand Laundry Customer Service Officer • On Demand Laundry Driver - Operator	• General Manager • Operations Manager • Finance and Administration Manager • Administration / Customer Service Officer • Production / Shift Supervisor • Team Leader • Laundry Workers - multi-task with some specialisation	• CEO • Directors • Digital Systems / IT Support Team • Sales and Customer Service Team • Supply Chain and Linen Management Team • Production Management Team • Laundry Workers - Specialised Roles • Advanced Machine Operators • Production Assistants • Quality, Safety and Infection Control Team • Maintenance Team • Sustainability Officer

In owner-operated and small laundries, the workforce structure is usually flat and multifunctional. The Owner / Operator handles management, operational, and administrative tasks, often supported by a small team of laundry workers who perform multiple processing tasks across sorting, washing, finishing, and dispatch. Dedicated roles in areas such as production management, logistics coordination, quality assurance, maintenance, and digital systems are generally not separate positions. Instead, these responsibilities are integrated within existing roles or outsourced. In this setup, the framework is simplified to a few core roles, with most scale-dependent functions either missing, combined or contracted out.

In small to medium-sized laundries, a clearer organisational structure emerges. Supervisory roles, such as Production/Shift Supervisor and Production Team Leader, are typically in place to oversee workflow and staff. Logistics functions become more organised, with specific driver and dispatch roles, and some administrative and customer service functions are formalised. Maintenance capabilities may be handled

internally or through contracted services. Certain roles, like Production Manager, Procurement Officer, or Quality Assurance, are introduced based on the complexity of operations and client needs, especially in laundries serving healthcare or larger hospitality clients.

In large commercial and industrial laundries, including multi-site operations, the full occupational structure is well-defined. These operations feature high-volume, multi-shift production environments supported by formal management hierarchies, such as the CEO, Directors, and Area or Regional Managers. Production is organised into clear functional areas, with dedicated supervisors, team leaders, and laundry workers performing specialised roles. These roles are supported by Production Planners, Advanced Machine Operators, and Linen Inventory Coordinators. Logistics are crucial, dedicated dispatch and fleet management roles. Dedicated staff or teams may also oversee quality assurance, infection control, health and safety, and maintenance, covering mechanical, electrical, and increasingly automation-focused roles. Digital support systems such as ERP and linen-tracking technologies are becoming more common, and sustainability functions are beginning to develop as part of broader corporate responsibility and compliance requirements.

An interesting development in the commercial laundry space is the growth in on-demand laundry collection and pick-up services. This growth has been driven by urbanisation, time-poor consumers, and the widespread adoption of app-based, convenience-oriented services. This model shifts laundry from a fixed, customer-initiated activity to a flexible, service-led offering that combines door-to-door collection with optional click-and-collect points, enabling scalable and responsive service delivery.

Growth in this segment is supported by a lean yet multi-skilled workforce, centred on driver-operators who handle collection, delivery, and frontline customer interactions, alongside dispatch coordinators who manage routing and scheduling, and customer service staff who handle bookings and enquiries. As operations expand, additional roles may emerge to support efficiency and scale, including locker or drop-point attendants, systems and app support personnel, and sales or marketing staff to drive customer acquisition. Together, these occupations form an integrated service layer that connects customers to central processing facilities. On-demand laundry collection and pickup services may be standalone businesses or integrated into medium- to large-scale commercial laundry operations.

Section 7: Biomedical textile sector

7.1 Industry definition and scope

The Biomedical Textile sector is a specialised segment of the broader textile, clothing and footwear industry that overlaps with the healthcare and medical device sectors. This sector produces fibre-based materials and products designed to support clinical treatment, rehabilitation, and long-term health management (Australian Government 2024-25; Expert Market Research 2025).

Activities within the sector span both upstream manufacturing and downstream healthcare applications. These include the design, production, and distribution of wound care products, surgical textiles, implantable biomaterials, compression and pressure garments, and assistive textile-based devices. The sector also encompasses services such as custom garment fitting, clinical consultation, and product adaptation to individual patient needs (Australian Government 2024-25; Expert Market Research 2025).

The sector comprises a diverse range of organisations. These include multinational medical device companies, advanced biomaterials firms such as PolyNovo, manufacturers of protective and healthcare textiles such as Ansell, and small-to-medium enterprises specialising in rehabilitation and disability-support products, including Second Skin. Research institutions such as CSIRO also play a significant role in innovation and product development.

The sector is characterised by a mix of highly specialised manufacturing and service-oriented activities, with strong links between textile engineering, clinical practice, and patient care.

7.2 Economic contribution

Although smaller than mainstream textile or healthcare sectors, the Biomedical Textile sector plays a vital role in Australia's economy through its contribution to advanced manufacturing, healthcare delivery, and export activity.

The sector supports employment across metropolitan and regional Australia, spanning manufacturing, healthcare, research, and technical services. It includes both high-value export-oriented firms and locally focused service providers, particularly in rehabilitation and disability support.

Revenue streams are diverse and include:

- Manufacture and sale of medical and technical textile products
- Export of advanced biomaterials and medical devices
- Custom fabrication and fitting of compression and pressure garments

- Clinical support services and product adaptation
- Supply of consumables to hospitals and healthcare providers
- Beyond direct economic output, the industry contributes to:
- Healthcare system efficiency, by improving patient outcomes and reducing long-term treatment costs
- Disability and rehabilitation services, particularly through community-based care models
- Innovation and intellectual property development, strengthening Australia's global competitiveness

The sector also supports broader economic resilience by enabling local production of critical medical supplies, highlighted during periods of supply chain disruption.

7.3 Key trends and drivers

Growing demand for healthcare services, driven by an ageing population and rising rates of chronic disease, is increasing the need for biomedical textile products in both clinical and community settings. Rehabilitation and disability services are expanding, further strengthening demand for compression garments, assistive textiles, and long-term therapeutic products.

Sustainability and healthcare efficiency are also shaping the sector. There is increasing emphasis on products that improve recovery outcomes, reduce hospital stays, and support home-based care and independent living.

Technological advancements are transforming the industry. Developments in biomaterials, smart textiles, and antimicrobial fabrics are expanding product capabilities. Digital technologies are also influencing service delivery, including 3D body scanning, custom garment design, and remote patient monitoring.

At the same time, the industry faces challenges. Regulatory requirements for medical products are complex and resource intensive. Global competition, particularly from large multinational manufacturers, puts pressure on local firms. Workforce capability is another concern, as the sector requires a combination of technical textile skills and clinical knowledge, which are not always supported by formal training pathways. The reliability of global supply chains and rising fuel and transport costs pose a significant challenge for local manufacturers. Finally, changes to government-funded programs, such as the NDIS, could limit consumer access to biomedical products.

7.4 Transformation priorities

Transformation priorities focus on strengthening industry capability across skills, innovation, and system integration.

Structured training pathways that integrate textile technology, biomedical engineering, and clinical applications are needed to support both entry-level roles

and advanced specialisations. Attracting new entrants to technical and clinical hybrid roles is critical.

Innovation remains a key priority, particularly in biodegradable materials, smart textiles, and customised patient solutions. Strengthening collaboration among industry, healthcare providers, and research organisations such as CSIRO is essential.

Developing business capability is also important, especially for SMEs. This includes building expertise in regulatory compliance, quality assurance, digital systems, and international market access.

Embedding patient-centred and community-based care models is another priority, reflecting the growing importance of rehabilitation, disability services, and long-term health management.

7.5 Future growth areas

Future growth in the Biomedical Textile sector is expected to focus on high-value, specialised segments rather than high-volume commodity production.

Promising areas include:

- Advanced wound care and regenerative biomaterials
- Compression and pressure garments for rehabilitation and chronic conditions
- Smart and wearable medical textiles for monitoring and preventive care
- Customised and adaptive textiles for disability support
- Antimicrobial and infection-control fabrics.

There is strong potential for expansion through:

- Export growth in advanced medical products
- Partnerships with hospitals, aged care providers, and disability services
- Integration with digital health technologies
- Collaboration with research institutions and global medtech firms.

As healthcare delivery continues to shift toward outpatient and home-based care, the role of medical textiles in everyday health management is expected to increase significantly.

7.6 Occupational framework

The occupational framework for the Biomedical Textile sector outlines the main functional areas and associated occupations, linking technical manufacturing roles with clinical, research, and business functions.

Table 8: Occupational Framework and Skill Profiles – Biomedical Textile Sector

Function	Occupation	Status	Skill Profile
	Managing Director / CEO / Owner	Core	CS13

Management - larger scale	Director – Operations / COO / General Manager / Operations Manager	Scale dependent	CS05
	Director – Finance and Corporate Services / CFO / Head of Finance / Financial Controller	Scale dependent	CS03
	Director/Manager – Product Design and Development	Scale dependent	CS06
	Manager – Human Resources and Workforce Development	Scale dependent	CS04
	Manager – Risk, Compliance and Sustainability	Scale dependent	CS07
Management - medium - small scale	Owner Operator / Business Proprietor / Workshop Owner / Studio Director	Core	CS44
	Director – Operations / COO / General Manager / Operations Manager	Scale dependent	CS05
Business Development	Partnerships and Business Development Coordinator	Scale dependent	CS41
Digital Systems	Manager – Technology and Digital Systems	Scale dependent	CS09
	IT Systems Support Officer	Scale dependent	CS11
Administration	Administration Officer	Core	CS01
Clinical and Patient Services	Occupational Therapist	Out of scope - health care	
	Physiotherapist	Out of scope - health care	
	Wound Care Nurse / Clinical Specialist	Out of scope - health care	
	Prosthetist / Orthotist	Out of scope - health care	
	Compression Garment Fitting Specialist	Core	SSBIO01
Sales and Customer Service	Manager – Sales and Marketing	Scale dependent	CS08
	Key Account Manager	Scale dependent	CS59
	Sales Representative	Scale dependent	CS58
	Customer Service Officer / Assistant	Core	CS37
Production Management [onshore or offshore]	Production Manager	Core	CS18
	Production Planner / Scheduler	Scale dependent	CS19
	Production / Sample Coordinator	Core	CS20

	Offshore Production Coordinator	Scale dependent	CS14
	Supplier Quality / Technical Compliance Auditor	Emerging	CS28
Manufacturing - Rehabilitation, Compression and Disability Support Textiles Production	Digital Pattern Maker - Biomedical Garments	Core	SSBIO02
	CAD Technician	Scale dependent	CS75
	Industrial Sewing Machine Operator	Core	CS84
	Alterations and Adjustment Specialist - Biomedical Garments	Scale dependent	SSBIO03
	3D Body Scanner Operator	Emerging	SSBIO06
Manufacturing - Acute and Clinical Care Textiles Production	Textile Production Technician	Core	SSBIO07
	Product Assembly Technician -	Core	SSBIO08
	Sterilisation and Packaging Technician	Core	SSBIO09
Manufacturing - Biomaterials and Implantable Textile Materials	Cleanroom Production Technician	Core	SSBIO10
	Advanced Fabrication Technician	Core	SSBIO11
	Process and Quality Technician	Core	SSBIO12
	Sterilisation and Validation Technician	Core	SSBIO13
Quality, WHS and compliance	Quality Assurance Coordinator	Core	CS21
	Quality Control Inspector	Core	CS22
	WHS Coordinator	Scale dependent	CS34
	Product Compliance Coordinator	Emerging	SSAPP16
	Regulatory Affairs Specialist	Emerging	SSBIO14
Research and Product Development	Research and Development Coordinator	Scale dependent	CS76
	Materials Technologies Specialist	Scale dependent	CS83
	Laboratory Technician	Scale dependent	CS81
	Product Developer	Core	SSBIO15
	Prototyping and Testing Technician	Core	SSBIO04
	Biomedical Textile Product Development Engineer	Core	SSBIO05
Equipment and Systems Support	Maintenance Supervisor	Scale dependent	CS49
	Maintenance Technician	Scale dependent	CS50

Supply chain management	Procurement / Supply Chain Specialist	Core	CS38
	Procurement / Purchasing Officer	Core	CS57
	Warehouse and Logistics Supervisor	Scale dependent	CS32
	Warehouse Inventory Controller	Scale dependent	CS33
	Forklift Operator	Scale dependent	CS10
	Pick/Pack Operator	Core	CS17
	Storeperson	Core	CS27
Industry Development and Engagement	Training and Standards Lead	Scale dependent	CS40
	Sustainability and Circular Economy Specialist	Emerging	CS29

7.7 Scalability

The occupational framework reflects the sector's diverse structure, spanning small, specialised enterprises to large multinational organisations.

In small businesses, roles are often integrated. Individuals may combine responsibilities across technical production, clinical interaction, customer service, and business management. In larger organisations, roles become more specialised across functions such as production, research and development, regulatory compliance, and clinical support. Dedicated teams are required to manage complex processes, including product development, quality assurance, and distribution across international markets.

This scalability enables consistent skill development and career progression pathways, allowing workers to move from broad, integrated roles in small firms to specialised or managerial positions in larger organisations, thereby supporting long-term industry growth and capability development.

Section 8: Carpet and textile floor covering manufacturing sector

8.1 Industry definition and scope

The Carpet Manufacturing sector is a specialised part of Australia's textile manufacturing industry, operating in the downstream segment of the value chain. It transforms fibres and yarns into finished textile floor coverings for use in residential, commercial, and institutional settings. These products include broadloom carpets, carpet tiles, rugs, and other textile floor coverings.

Companies in the sector manufacture carpets and related products, such as mats and matting, from a range of natural and synthetic fibres. Although formal industry classifications include woven, knotted, tufted, and felt carpets, domestic production in Australia is almost exclusively tufted carpet manufacturing, with woven carpet production no longer undertaken at scale. Tufting involves inserting yarn into a primary backing using high-speed machines, followed by coating, backing, and finishing. This method dominates because of its efficiency, flexibility, and suitability for large-scale production.

The sector is dominated by a small number of firms operating capital-intensive manufacturing facilities, mainly in Victoria and New South Wales. Major companies include Premium Floors Australia, Victoria Carpets, Quest Carpets, and Beaulieu of Australia. These firms are typically vertically integrated, combining manufacturing with distribution and wholesale activities. Compared with other textile manufacturing industries, carpet production in Australia is relatively concentrated and technologically advanced.

8.2 Economic contribution

The Carpet Manufacturing sector generates approximately $899 million in annual revenue and employs around 1,380 workers across 79 businesses (IBISWorld 2025). While relatively small within the broader manufacturing sector, it plays a significant value-adding role in Australia's construction supply chain, converting raw textile materials into finished flooring products used across multiple industries.

Activity in the carpet manufacturing sector is closely linked to the Australian construction industry, particularly residential building. Because carpets are typically installed in the final stages of construction, demand is sensitive to changes in dwelling commencements and building approvals. Recent ABS data indicate ongoing volatility, with dwelling commencements showing periods of recovery alongside continued

fluctuations. Growth in higher-density housing, particularly apartment developments, is supporting demand.

Residential construction remains the primary demand driver, with non-residential sectors such as commercial, education, and healthcare providing a secondary source of demand. Overall, the sector exhibits strong cyclical behaviour, with production volumes closely tracking construction activity. Periods of increased building activity drive higher demand, while downturns place pressure on output and revenue. Despite this, the sector continues to support domestic manufacturing capability and provide stable employment.

The industry is relatively capital-intensive, with high revenue per employee and a relatively small workforce. Profitability remains constrained, with an average profit margin of 4.7% (IBISWorld 2025). The sector's economic importance lies in its direct impact on employment and its integration with the construction and retail flooring sectors.

8.3 Key trends and drivers

Demand for carpet manufacturing is primarily driven by construction activity. Movements in residential and non-residential construction, including commercial, industrial, and institutional buildings, significantly impact industry activity.

A key influence on the industry is import competition. Low-cost imported carpets account for more than 40% of domestic demand, putting pressure on local manufacturers (IBISWorld 2025). Overseas producers benefit from lower labour costs and economies of scale, enabling them to supply products at lower prices than domestic firms. In response, Australian manufacturers have increasingly focused on product differentiation through quality and design.

Consumer preferences are also shifting, with growing demand for hard flooring materials such as timber, laminate, and ceramic tiles. These alternatives are often seen as easier to maintain and better suited to contemporary housing design, thereby reducing carpet's share of the overall flooring market.

Within the product mix, tufted carpets dominate due to their affordability, durability, and production efficiency. IBISWorld data indicates that tufted carpets account for more than 70% of industry revenue.

Input costs, particularly wool prices, are significant. Wool remains a key material in many carpets, and price fluctuations driven by global demand and weather conditions can significantly affect production costs and pricing. Manufacturers often respond by using synthetic fibres or blends to reduce production costs.

Technological development is centred on improving efficiency and product quality through automation and digitalisation. Advances in tufting machinery, computerised patterning, and environmentally efficient production processes are reshaping production and skill requirements in the sector.

8.4 Transformation priorities

Transformation in the carpet manufacturing sector is focused on strengthening competitiveness. A key priority is moving into high-value product segments, with manufacturers concentrating on premium carpets that can achieve higher prices.

The introduction of new technology is central to this transformation. Investment in advanced tufting systems, automation, and digital design capabilities aims to improve productivity and product variety. This requires a more technically skilled workforce.

Workforce skills development is a critical priority. The industry relies on a relatively small but specialised workforce, and demand for skills in areas such as process control, maintenance, automation, and quality assurance is growing. Strengthening vocational training pathways and supporting workforce retraining are critical.

Sustainability is also becoming more important. Manufacturers are investing in environmentally responsible production processes, such as reducing energy and water use, incorporating recycled materials, and meeting certification standards. These initiatives are driven by regulatory requirements and growing customer expectations.

In addition, firms are pursuing greater vertical integration and supply chain coordination. By integrating manufacturing, distribution and sales, companies can reduce costs and improve responsiveness.

8.5 Future growth areas

Future growth in the carpet manufacturing sector is expected to be modest, with revenue forecast to increase at an annualised rate of 1.5% over the five years to 2028–29 (IBISWorld 2025). Growth will be driven primarily by expansion in construction activity, particularly in apartment and non-residential building sectors.

A key area of growth is the continued development of advanced tufted carpet products. Innovations in design, durability, and manufacturing production will support product differentiation and competitiveness. Digital design is expected to play an important role in meeting customer requirements.

Commercial and institutional markets are also likely to present growth opportunities, particularly for carpet tiles and modular flooring systems used in offices, schools, hospitals, and hospitality environments.

Sustainability-focused products are another important growth area. Increasing demand for environmentally friendly flooring solutions is driving innovation in recyclable materials, low-emission products, and circular manufacturing processes.

Despite these opportunities, growth will be constrained by ongoing competition from imports and alternative flooring products. As a result, employment growth is expected to be limited, but demand for skilled technicians is likely to increase.

8.6 Occupational framework

The occupational structure of the carpet manufacturing sector reflects a modern, automated production environment centred on tufted carpet manufacturing.

Table 9:Occupational Framework and Skill Profiles – Carpet and Textile Floor Covering Manufacturing Sector

Function	Occupation and Status		Skill Profile
Management	Managing Director / CEO / Owner	Core	CS13
	Director – Operations / COO / General Manager / Operations Manager	Core	CS05
	Manager – Sales and Marketing	Core	CS08
	Manager - Supply Chain and Procurement	Scale dependent	CS56
	Director – Finance and Corporate Services / CFO / Head of Finance / Financial Controller	Scale dependent	CS03
	Manager – Human Resources and Workforce Development	Scale dependent	CS04
	Manager – Technology and Digital Systems	Scale dependent	CS09
	Manager – Risk, Compliance and Sustainability	Scale dependent	CS07
Administration and Business Support	Administration Officer	Core	CS01
	Human Resources / Workplace Health and Safety Coordinator	Scale dependent	CS42
Customer Service	Customer Service Officer / Assistant	Core	CS37
Product Design and Development	Product Design and Development Manager	Scale dependent	SSCAR13
	Product Development Technologist	Core	SSCAR12
	CAD Technician	Scale dependent	CS75
	Research and Development Coordinator	Scale dependent	CS76
Sales, Marketing and Customer Solutions	Key Account Manager	Core	CS59
	Sales Representative	Core	CS58
	Specification Consultant (architects / designers)	Core	SSCAR14
Production Management	Production Manager	Core	CS18
	Production / Shift Supervisor	Core	CS46

	Production Planner / Scheduler	Scale dependent	CS19
Yarn Production and Preparation	Yarn Production and Processing Operator	Core	SSCAR09
	Yarn / Process Quality Technician	Core	SSCAR07
	Dyeing and Colour Control Technician	Core	SSCAR08
Carpet Manufacturing Operations	Production Team Leader	Core	SSCAR05
	Production Technician [Mechanical/Process]	Core	SSCAR06
	Production Operator - Tufting	Core	SSCAR01
	Production Operator - Backing / Coating Line	Core	SSCAR02
	Production Operator - Finishing	Core	SSCAR03
	Creel Loader	Core	SSCAR04
Quality and Compliance	Quality Assurance Coordinator	Core	CS21
	Product Testing Technician	Scale dependent	SSCAR10
	Environmental Compliance Officer	Scale dependent	SSCAR11
Engineering and Maintenance	Maintenance Supervisor	Core	CS49
	Maintenance Technician	Core	CS50
	Electrician	Core	CS48
	CS65 Automation / PLC Technician	Emerging	CS65
Supply Chain, Materials and Logistics	Warehouse and Logistics Supervisor	Core	CS32
	Warehouse Operator	Core	CS73
	Dispatch / Distribution Coordinator	Scale dependent	CS53
Digital Systems and Business Support	IT Systems Support Officer	Core	CS11
	Enterprise Resource Planning (ERP) Support Officer	Scale dependent	CS64
	Data and Process Improvement Analyst	Emerging	CS74
Sustainability	Sustainability and Circular Economy Specialist	Emerging	CS29

8.7 Scalability

The carpet manufacturing sector is shaped by a small number of firms operating medium to large scale production facilities.

In smaller operations, roles are often combined, with employees performing multiple functions across production, maintenance, and logistics. In larger organisations, roles become more specialised, with dedicated teams for engineering, quality assurance, and supply chain management.

Scalability is influenced more by plant capacity, automation level, and vertical integration. Larger companies benefit from economies of scale, stronger brand recognition, and the ability to invest in advanced technologies.

Across all firms, the industry is transitioning toward a more technologically advanced and efficiency-driven operating model. This shift requires a skilled workforce capable of supporting modern manufacturing systems.

8.8 Artificial grass (Synthetic turf systems)

The production of artificial grass and synthetic turf systems is an important sector of the carpet and textile floor covering manufacturing sector.

This sector has similar production processes to carpet manufacturing, particularly in tufting, backing, coating, and finishing operations. As a result, there is significant overlap in skill requirements in production roles.

In Australia, demand for synthetic turf is increasing across sports and recreation, commercial landscaping, educational facilities, and urban development. This growth is driven by the durability, low maintenance, and water efficiency of synthetic surfaces.

Synthetic turf production mirrors carpet manufacturing. The process involves extruding synthetic fibres such as polyethylene or polypropylene, tufting them into a backing material, applying coatings such as latex or polyurethane, and finishing the product into rolls or tiles. As a result, many carpet manufacturing skills, particularly in tufting and backing, are directly transferable to synthetic turf production.

The following chart sets out the additional occupations required to support the manufacture of synthetic turf systems.

Table 10: Supplementary Occupational Framework and Skill Profiles – Artificial Grass (Synthetic Turf Systems)

Function	Occupation and Status		Skill Profile
Artificial Grass [Synthetic Turf] Design, Manufacturing and Installation	Sports Surface Systems Design and Testing Technician	Scale dependent	SSCAR17
	Production Operator - Extrusion	Core	SSCAR16
	Synthetic Turf Installer	Core	SSCAR18
	Synthetic Surface Maintenance Technicians	Core	SSCAR19

Section 9: Textile recycling and remanufacturing sector

9.1 Industry definition and scope

The Textile Recycling and Remanufacturing sector is an emerging component of Australia's Textile, Clothing and Footwear (TCF) industry, supporting the transition to a more circular economy by extending the productive life of textile materials and reducing waste sent to landfill (Khan, Wang & Padhye 2023; Productivity Commission 2026). While textile recycling and textile remanufacturing are closely linked, they represent two distinct stages within the circular textile value chain (Khan, Wang & Padhye 2023).

Textile recycling focuses on the recovery and processing of post-consumer and post-industrial textile waste to produce reusable raw materials. Activities include the collection, sorting, grading, inspection, cleaning, de-branding and preparation of textile waste, followed by processes such as shredding, fibre opening, material separation and fibre recovery (Khan, Wang & Padhye 2023). Recycling technologies include established mechanical recycling methods as well as emerging chemical recycling processes capable of separating blended fibres into their constituent materials (Khan, Wang & Padhye 2023). The primary output of textile recycling is secondary raw materials that can be used in new manufacturing applications (Khan, Wang & Padhye 2023).

Textile remanufacturing focuses on converting recovered textile materials, recycled fibres and other reclaimed textile resources into new products with commercial value. It encompasses the design, engineering, fabrication, assembly and finishing of products manufactured from recycled or recovered textile materials. Depending on the enterprise, remanufacturing may produce products such as insulation, acoustic panels, composite materials, furniture components, industrial textiles, geotextiles and, where technology permits, new fibres, yarns or textile products (Khan, Wang & Padhye 2023). Unlike recycling, which is primarily concerned with material recovery, remanufacturing is a manufacturing activity that creates finished products from recovered materials.

Although many Australian enterprises undertake activities across both areas, textile recycling and textile remanufacturing require distinct technologies, production systems, workforce capabilities and occupational roles. Together they form complementary parts of Australia's emerging circular textile economy, supporting improved resource efficiency, reduced environmental impact and the development of new sustainable manufacturing industries (Productivity Commission 2026).

The sector comprises a diverse range of organisations, including small-to-medium enterprises, social enterprises, and a small number of technology-driven firms. Businesses such as BlockTexx focus on advanced recycling technologies, while others, such as UPPAREL, LOOP and Worn Up, focus on collection, sorting, and remanufactured product development. Community-based organisations also play a role in reuse and repurposing activities.

Overall, the sector is characterised by fragmented supply chains, high operational variability, and an evolving mix of recycling and remanufacturing capabilities.

9.2 Economic contribution

The economic contribution of the Textile Recycling and Remanufacturing sector is difficult to quantify. However, it is likely to grow as sustainability and circular economy initiatives expand. The sector contributes to waste reduction, resource recovery, and the development of new manufacturing inputs from textile waste (Khan, Wang & Padhye 2023; Productivity Commission 2026).

The sector is strategically important because Australia faces a significant textile waste problem and has limited domestic textile end-market capacity. The Australian Government estimates that around 800,000 tonnes of textile waste go to landfill each year, while the Productivity Commission's 2026 circular economy inquiry identified circular economy opportunities and barriers across priority materials, including textiles (Khan, Wang & Padhye 2023; Productivity Commission 2026).

The industry supports employment across collection, logistics, sorting, processing, and emerging manufacturing activities. Many roles are in metropolitan areas, though regional opportunities are growing where collection networks and processing facilities are established.

Revenue streams within the sector include textile collection services, resale and reuse of garments, supply of recycled textile materials, production of remanufactured goods, and sustainability services for corporate and institutional clients. These services are increasingly linked to companies' environmental, social and governance (ESG) reporting and compliance requirements (Productivity Commission 2026).

While the sector does not yet constitute a major industrial base, its economic value lies in its potential to reduce landfill costs, retain material value within the domestic economy, and support the development of circular manufacturing systems. As policy frameworks and market demand evolve, the sector is expected to expand its contribution to both employment and industrial activity (Productivity Commission 2026; Khan, Wang & Padhye 2023).

9.3 Key trends and drivers

A number of structural trends are shaping the development of the Textile Recycling and Remanufacturing sector in Australia. Rising volumes of textile waste, driven by high levels of clothing consumption and short product lifecycles, are increasing the need for effective recovery and recycling systems (Khan, Wang & Padhye 2023; Productivity Commission 2026).

Sustainability and circular economy policies are significant drivers. Government initiatives and industry-led schemes are placing increasing emphasis on waste diversion, product stewardship, and the development of closed-loop systems (Australian Fashion Council et al. 2023; Productivity Commission 2026). Corporate commitments to sustainability are also creating demand for textile recycling services and traceable recovery solutions (Australian Fashion Council et al. 2023; Productivity Commission 2026).

Technological development is another important factor. Advances in mechanical processing and the emergence of chemical recycling technologies are expanding the range of materials that can be recovered and reused (Khan, Wang & Padhye 2023). However, these technologies are still in early stages of commercialisation within Australia (Khan, Wang & Padhye 2023).

The sector also faces several constraints. Textile waste streams are highly variable and often contaminated, making sorting and processing complex and labour-intensive. Limited domestic end markets for recycled materials and competition from low-cost virgin materials restrict commercial viability. In addition, the absence of standardised collection systems and material specifications creates inefficiencies across the value chain (Khan, Wang & Padhye 2023; Productivity Commission 2026).

Workforce capability is an emerging issue, with demand for practical operational skills as well as specialised knowledge in materials, processing technologies, and circular product design (Productivity Commission 2026).

9.4 Transformation priorities

Transformation priorities in the Textile Recycling and Remanufacturing sector focus on building capability across collection systems, processing infrastructure, market development, and workforce skills.

A key priority is the development of consistent and scalable collection and sorting systems. Improving the quality and reliability of feedstock is essential to enable more efficient recycling and remanufacturing processes. Investment in sorting infrastructure and standardised processes will support this objective (Australian Fashion Council et al. 2023; Khan, Wang & Padhye 2023).

Expanding domestic processing capacity is another critical area. This includes both mechanical recycling and emerging chemical recycling technologies. Developing local capability reduces reliance on export markets for textile waste and supports the growth of onshore manufacturing.

Market development is also important. Creating demand for recycled textile materials and remanufactured products is necessary to ensure commercial viability. This includes engagement with sectors such as construction, interiors, and industrial manufacturing, as well as the integration of recycled materials into procurement frameworks (Australian Fashion Council et al. 2023; Productivity Commission 2026).

Workforce development is a priority, particularly in operational roles such as sorting and processing, as well as in emerging areas such as product development, materials science, and sustainability reporting. Training pathways need to reflect the practical and multidisciplinary nature of the sector.

Finally, improving data, traceability, and reporting systems is essential to support transparency and accountability, particularly in relation to environmental outcomes and ESG requirements (Australian Fashion Council et al. 2023).

9.5 Future growth areas

Future growth in the Textile Recycling and Remanufacturing sector is expected to occur in specialised and value-added segments rather than in high-volume commodity recycling.

Opportunities exist in the recovery and processing of specific textile streams such as corporate uniforms, workwear, and institutional textiles, where consistent material supply and traceability can be achieved. These streams support both recycling and remanufacturing pathways.

Growth is also expected in the development of new products derived from recycled textiles. This includes construction materials such as insulation and acoustic panels, as well as industrial and consumer products. Integration with other sectors will be important in creating viable end markets.

Advanced recycling technologies represent a longer-term growth area. Chemical recycling processes that can separate blended fibres and produce high-quality outputs have the potential to significantly expand the scope of the sector, although commercial deployment is still limited.

Collaboration between industry, research organisations, and government will play a key role in supporting innovation and scaling new technologies (Australian Fashion Council et al. 2023; Productivity Commission 2026). Export opportunities may also emerge as Australia develops capability in specialised recycling and remanufacturing processes.

Overall, growth will be driven by a combination of policy support, technological advancement, and the development of stable markets for recycled materials and products.

9.6 Occupational framework

As illustrated in Table 11, the occupational structure of the Textile Recycling and Remanufacturing sector is emerging. This framework outlines the main functional areas and associated occupations, reflecting an industry dominated by small to medium-sized enterprises. Employment structures are typically lean, with a high degree of role integration and a strong focus on operational activities.

Table 11: Occupational Framework and Skill Profiles – Textile Recycling and Remanufacturing Sector

Function	Occupation and Status		Skill Profile
Management	Managing Director / CEO / Owner	Core	CS13
	Operations Coordinator	Core	CS85
	Production Manager	Core	CS18
Administration	Administration Officer	Core	CS01
Collection and Logistics	Truck Driver	Core	CS78
	Warehouse and Logistics Supervisor	Scale dependent	CS32
	Warehouse Operator	Core	CS73
Customer Interface	Customer Service Officer / Assistant	Scale dependent	CS37
	Partnerships and Business Development Coordinator	Scale dependent	CS41
Textile waste sorting	Textile Sorter / Grader	Core	SSTRR01
Textile Recycling	Textile Recycling Team Leader	Scale dependent	SSTRR04
	Textile Sorting and Materials Recovery Operator	Core	SSTRR02
	Textile Recycling Operator	Core	SSTRR03
Textile Remanufacturing	Textile Remanufacturing Team Leader	Scale dependent	SSTRR06
	Textile Remanufacturing Operator	Core	SSTRR05
Maintenance	Maintenance Technician	Core	CS50
Research and Development	Research and Development Coordinator	Scale dependent	CS76
	Laboratory Technician	Scale dependent	CS81
	Quality Assurance Coordinator	Scale dependent	CS21

Quality Assurance and Compliance	Health, Safety and Environment Coordinator	Scale dependent	CS52
Sustainability	Sustainability and Circular Economy Specialist	Scale dependent	CS29

9.7 Scalability

The occupational framework reflects the structure of an emerging sector.

In smaller organisations, roles are highly integrated, with individuals performing multiple functions across collection, sorting, logistics, customer engagement, and production. Management structures are typically lean, enabling flexibility but limiting specialisation.

As organisations grow, roles become more defined, with clearer separation between operational, logistical, and administrative functions. Larger enterprises may introduce supervisory roles and more structured production activities.

In a small number of research-oriented organisations, specialised roles in research and development and product testing are emerging. These roles are critical to innovation and long-term growth but are not yet widespread across the sector.

Overall, scalability is driven by the gradual expansion of operational capacity and the development of remanufacturing and advanced recycling capabilities. The framework supports workforce progression from broad operational roles to more specialised technical and managerial positions as the sector evolves.

Section 10: Cotton ginning sector

10.1 Industry definition and scope

The Cotton Ginning sector is a specialised component of Australia's broader agriculture, fibre-processing and textile manufacturing industry. Unlike cotton growing, which produces raw seed cotton, this sector operates in the midstream of the value chain, transforming harvested cotton into market-ready products. Core activities include separating cotton lint from seed, cleaning and drying fibre, removing contaminants, and compressing lint into bales for storage, transport, and export (Cotton Australia 2023; CRDC & ACIL Tasman 2012).

The sector produces two primary outputs: cotton lint (for textile manufacturing) and cottonseed (used in oil production and animal feed). The majority of lint is exported, particularly to Asian textile markets, making the industry a key enabler of Australia's export economy (Cotton Australia 2023; ABARES 2025).

The industry comprises a relatively small number of firms operating large-scale ginning facilities in major cotton-growing regions of New South Wales and Queensland. Facilities are typically capital-intensive and operate seasonally, aligned with harvest cycles. Businesses range from independent ginning operators to vertically integrated agribusinesses with interests across growing, processing, and exporting. Compared with highly fragmented service industries, cotton ginning is concentrated and infrastructure-heavy, with each site serving large geographic catchments of cotton farms (CRDC & ACIL Tasman 2012; Cotton Australia 2023).

10.2 Economic contribution

Although modest in size relative to the broader agricultural sector, the Cotton Ginning industry plays a critical value-adding role in the national economy. It converts raw cotton into a tradable commodity, making it essential to Australia's position as a major cotton exporter (Cotton Australia 2023; ABARES 2025).

Industry revenue and output are inherently volatile, reflecting fluctuations in cotton production driven by rainfall, irrigation water availability, and global commodity prices. Droughts can significantly reduce throughput, while favourable seasons lead to strong production surges. As a result, the industry's economic contribution varies year to year (ABARES 2025; Cotton Australia 2023).

At a regional level, cotton ginning supports economic activity in rural communities by providing specialised employment, supporting transport and logistics services, and enabling downstream export earnings. However, even in cotton-producing regions, the sector accounts for a relatively small share of total employment, reflecting its

capital-intensive nature. Its economic importance lies less in direct employment and more in its role as a critical processing link within the cotton supply chain (CRDC & ACIL Tasman 2012; Cotton Australia 2023).

10.3 Key trends and drivers

Climate variability and water availability remain the dominant forces shaping the cotton ginning industry. Cotton production is highly dependent on irrigation, and fluctuations in rainfall and water allocations directly affect the volume of cotton available for processing. Increasing climate uncertainty is making the industry more cyclical, with pronounced swings between low-output drought years and high-production seasons (ABARES 2025; Cotton Australia 2023).

Global market dynamics also play a central role. The industry is export-oriented, with demand driven by international textile markets, particularly in Asia. Changes in global prices, trade conditions, and geopolitical relationships can significantly influence processing volumes and profitability (ABARES 2025; Cotton Australia 2023).

Technological advances and automation are transforming operations. Modern ginning facilities use advanced sensors, automated systems, and high-capacity processing equipment to improve efficiency, reduce contamination, and enhance fibre quality. This is reshaping workforce requirements, reducing reliance on manual labour while increasing demand for technical and maintenance skills (Cotton Australia 2023).

Industry consolidation and scale efficiencies are ongoing. The sector is characterised by a relatively small number of firms operating large, high-throughput facilities. Investment is increasingly directed towards modern, efficient plants capable of servicing large production areas, resulting in fewer but more productive gins (CRDC & ACIL Tasman 2012; Cotton Australia 2023).

Supply chain integration is strengthening, with closer coordination among growers, ginners, and exporters to improve logistics, quality control, and throughput efficiency. Gins are evolving into integrated processing hubs within the cotton value chain (Cotton Australia 2023).

Sustainability and environmental pressures are also increasing. There is growing emphasis on reducing energy consumption, managing emissions, improving water efficiency, and meeting sustainability expectations from global buyers.

Regional labour dynamics present ongoing challenges. The industry relies on a small but skilled workforce and must attract and retain workers in regional locations while managing seasonal labour requirements during peak processing periods (Cotton Australia 2023).

10.4 Transformation priorities

Transformation priorities in the cotton ginning sector focus on strengthening resilience, efficiency, and workforce capability in response to environmental, technological, and market pressures (ABARES 2025; Cotton Australia 2023).

A key priority is enhancing technical workforce skills, particularly in automation, electrical systems, instrumentation, and process control. As facilities become more technologically advanced, workers are increasingly required to operate, monitor, and maintain complex equipment (Cotton Australia 2023).

Strengthening training pathways is also critical, especially in regional areas where access to skilled labour is limited. There is a need to develop structured entry pathways for tradespeople, plant operators, and technicians, supported by vocational education and on-the-job training (Cotton Australia 2023).

Improving climate resilience is another major priority. This includes increasing operational flexibility to manage variability in cotton supply and adopting practices that support efficient water and energy use (ABARES 2025).

Embedding sustainability practices is increasingly important. This includes reducing emissions, improving energy efficiency, and aligning operations with environmental standards expected by international markets (ABARES 2025; Cotton Australia 2023).

Advancing digital integration is also a focus area. Data-driven process optimisation, predictive maintenance systems, and digital monitoring tools are central to improving operational performance (Cotton Australia 2023).

Finally, supporting regional workforce attraction and retention is essential. This includes addressing workforce mobility, providing stable employment opportunities, and improving the sector's career attractiveness.

10.5 Future growth areas

Future growth in the cotton ginning sector is expected to focus on efficiency, quality, and integration rather than on expanding firm numbers or employment levels (Cotton Australia 2023; ABARES 2025).

Key growth areas include developing high-capacity, technologically advanced ginning facilities capable of processing larger volumes more efficiently. Data-driven optimisation of processing systems will continue to improve productivity and fibre quality (Cotton Australia 2023).

Greater integration with supply chain logistics is also expected, enabling more efficient movement of cotton from farms to export markets. This includes improvements in storage, transport coordination, and export handling (Cotton Australia 2023).

Sustainability-focused operations will play an increasing role, particularly as global textile markets demand environmentally responsible production practices. This may include energy-efficient technologies, emissions-reduction strategies, and improved resource management (ABARES 2025).

There is also potential for expansion in value-added by-products, particularly in the processing and utilisation of cottonseed (CRDC & ACIL Tasman 2012).

While overall employment growth is likely to remain modest, demand for skilled trades, technical operators, and engineering roles capable of supporting advanced processing systems will increase (Cotton Australia 2023).

10.6 Occupational framework

The occupational framework for the Cotton Ginning sector outlines the main functional areas and associated occupations, noting that employment in the sector is highly seasonal.

Table 12: Occupational Framework and Skill Profiles – Cotton Ginning Sector

Function	Occupation and Status		Skill Profile
Management	Gin Manager / Plant Manager	Core	SSGIN01
	Production Manager	Core	CS18
Engineering	Plant Engineer	Scale dependent	CS02
	SCADA Technician	Emerging	CS77
Administration	Administration Officer	Core	CS01
	Human Resources / Workplace Health and Safety Coordinator	Scale dependent	CS42
	IT Systems Support Officer	Scale dependent	CS11
Production Operations	Head Ginner / Shift Supervisor	Core	SSGIN02
	Ginning Machine Operator	Core	SSGIN03
	Assistant Ginner / Process Worker	Scale dependent	SSGIN04
	Material Handling Operator [Forklift / Front End Loader Operator/ Module Feeder]	Core	SSGIN05
	Bale Press Operator	Core	SSGIN06
	Grablift / Moonbuggy Operator	Core	SSGIN07
Logistics and Supply Chain	Warehouse and Logistics Supervisor	Scale dependent	CS32
	Truck Driver	Core	CS78

	Weighbridge Operator	Core	CS79
	Supply Chain / Export Coordinator	Emerging	CS80
Maintenance	Maintenance Supervisor	Scale dependent	CS49
	Maintenance Technician	Core	CS50
	Electrician	Core	CS48
	Instrumentation Technician	Emerging	CS66
	CS65 Automation / PLC Technician	Emerging	CS65
Quality Assurance and Fibre Classification	Cotton Classer	Scale dependent	SSGIN08
	Laboratory Technician	Scale dependent	CS81
	Quality Systems and Traceability Coordinator	Emerging	CS82
Support and seasonal roles	Yard and Gin Cleaner	Core	SSGIN09
	Seasonal Labourer	Core	SSGIN10

10.7 Scalability

The occupational framework reflects the industry's low number of firms and its large-scale operational model, in which each gin operates as a high-capacity industrial facility. Roles are shaped more by plant size, throughput capacity, and level of automation than by the number of businesses.

In smaller or single-site operations, roles are often combined. Workers may perform multiple functions, such as operating machinery while assisting with maintenance or logistics. Management structures are typically lean, with limited role specialisation.

In larger or integrated agribusiness operations, roles become more specialised. Dedicated teams cover engineering, maintenance, logistics, quality assurance, and administration. Additional roles emerge in areas such as compliance, safety, sustainability, and digital systems management.

Across all scales, the framework serves as a capability model that supports workforce planning, training development, and operational efficiency.

Section 11: Wool scouring sector

11.1 Industry definition and scope

The Wool Scouring sector is a specialised part of Australia's wool, fibre-processing, and textile manufacturing industry. Unlike wool growing and shearing, which produce raw, greasy wool, this sector operates midstream in the supply chain, converting raw fleece into clean, market-ready fibre. Its main activities include washing and degreasing wool (scouring), removing vegetable matter by carbonising, drying the fibre, and preparing wool for storage, transport, and export (AWI 2023; ABARES 2025).

The sector produces cleaned wool that can be further processed into yarns and textiles. However, most Australian wool is exported before scouring, so domestic operations handle only a small share of total output. Consequently, the industry is a residual yet essential processing stage within the wool supply chain. It consists of a very small number of firms that have effectively consolidated into a single operator, Australian Wool Processors (AWP), since June 2025, following the merger of the last two scours (Sheep Central 2025; Australian Broadcasting Corporation (ABC Rural) 2025). These facilities are capital-intensive, continuous-processing plants located in traditional wool-producing regions. Wool scouring is highly concentrated and infrastructure-intensive, with each plant serving a broad geographic area.

11.2 Economic contribution

Although small compared to the broader wool industry, the Wool Scouring sector plays a limited but important value-adding role. It converts raw, greasy wool into cleaned fibre suitable for textile manufacturing and export.

Industry output is constrained by structural factors. Unlike cotton ginning, which processes most domestic production, wool scouring handles only a small share of Australian wool, as most is exported unprocessed. In 2023, approximately 95.6% of wool exports were greasy wool, sent offshore for cleaning and early-stage processing.

The broader wool industry remains economically significant. The Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) forecasts the industry's value will decline by 7% to $2.4 billion in 2025–26, reflecting lower production and market pressures.

At a regional level, wool scouring contributes to economic activity through supporting employment, industry skills, and logistics and export supply chains. Nevertheless, the sector accounts for a very small share of employment and manufacturing output, reflecting its highly capital-intensive and consolidated structure. Its economic

importance lies in its role as a critical processing link within a major export industry, rather than in direct economic activity.

11.3 Key trends and drivers

The decline in domestic processing is the main trend shaping the wool scouring sector. Most early-stage wool processing has shifted offshore, particularly to Asia, resulting in a significant reduction in domestic scouring. This has transformed the industry from a distributed processing network into a single operator.

Global market dynamics play a crucial role. The wool industry relies significantly on exports, driven by demand from international textile manufacturers. The extensive export of greasy wool emphasises the cost advantages of overseas processing compared to domestic scouring.

Industry consolidation has reached an advanced stage. The formation of AWP in 2025 represents the culmination of long-term rationalisation, with the sector now characterised by extreme concentration and limited competition.

Technological change and automation continue to shape operations. Modern scouring plants rely on continuous processing systems, chemical treatment processes, and automated handling equipment. These technologies improve efficiency and fibre quality but reduce labour intensity and increase demand for technical skills.

Upstream production trends also influence the sector. Fluctuations in wool production, driven by flock sizes, climate conditions, and commodity prices, affect the volume of wool available for domestic processing. Declining production volumes place further pressure on the viability of local processing.

Sustainability and environmental considerations are increasingly important. Wool processing is resource-intensive, requiring water, energy, and chemicals. There is a growing emphasis on improving environmental performance to meet regulatory requirements, buyer requirements and public expectations.

Regional skill availability presents ongoing challenges. The sector relies on a small, skilled workforce in regional areas, making it difficult to attract and retain workers, particularly in technical and maintenance roles.

11.4 Transformation priorities

Transformation priorities in the wool scouring sector focus on maintaining operational viability, improving efficiency, and strengthening workforce capability.

A key priority is enhancing workforce skills. As operations become more automated and process-driven, there is increasing demand for workers with skills in process control, automation, plant maintenance, and industrial systems.

Strengthening training pathways is critical, particularly in regional areas where access to skilled labour is limited. Developing structured pathways for plant operators, tradespeople, and technicians is essential to sustain operational capability.

Enhancing operational efficiency and competitiveness is a key focus. This involves optimising processing systems, decreasing energy and water consumption, and increasing production.

Addressing sustainability concerns is becoming increasingly important. This includes reducing emissions, managing water, and adopting environmentally friendly processing techniques. Progressing digital integration is also a priority. This will involve adopting data-driven monitoring, predictive maintenance, and process optimisation technologies to boost plant performance.

Finally, maintaining regional workforce skills is critical. This requires addressing skills shortages, supporting employee retention, and making trade and technical careers more attractive.

11.5 Future growth areas

Future growth in the wool scouring sector is expected to be limited. Key growth areas include developing high-value, specialised processing capabilities, such as premium wool preparation, traceable fibre processing, and environmentally sustainable production methods (AWI 2023; ABARES 2025).

There is potential to increase integration with supply chains, particularly in logistics, quality assurance, and export coordination. This could enhance efficiency and strengthen the role of domestic processing within the broader wool industry (AWI 2023).

Advances in processing efficiency and environmental management could lead to small, ongoing improvements in competitiveness (IBISWorld 2025).

Sustainability-focused operations are likely to become increasingly important, particularly as global buyers place greater emphasis on environmental performance and traceability (AWI 2023).

Employment growth is expected to be limited. However, demand for skilled technical roles, in areas such as automation, PLCs and maintenance, is likely to rise (IBISWorld 2025).

11.6 Occupational framework

The occupational framework for the Wool Scouring sector reflects its small scale, high level of mechanisation, and single-operator structure, with employment concentrated in production, maintenance, and logistics functions.

Table 13: Occupational Framework and Skills Profiles - Wool Scouring

Function	Occupation	Status	Skill Profile
Management	Plant Engineer	Core	CS02
	Production Manager	Core	CS18
Engineering	Plant Engineer	Scale dependent	CS02
	SCADA Technician	Emerging	CS77
Administration	Administration Officer	Core	CS01
	Human Resources / Workplace Health and Safety Coordinator	Scale dependent	CS42
	IT Systems Support Officer	Scale dependent	CS11
Production Operations	Scour Plant Operator	Core	SSWOL01
	Process Worker / Production Hand	Scale dependent	SSWOL02
	Carding / Combing Technician	Core	SSWOL03
	Materials Handling Operator	Core	SSWOL04
	Wool Presser / Baler	Core	SSWOL05
	Chemical Process Operator	Emerging	SSWOL06
Logistics and Supply Chain	Warehouse and Logistics Supervisor	Scale dependent	CS32
	Storeperson	Core	CS27
	Truck Driver	Core	CS78
	Weighbridge Operator	Core	CS79
	Supply Chain / Export Coordinator	Emerging	CS80
Maintenance	Maintenance Supervisor	Scale dependent	CS49
	Maintenance Technician	Core	CS50
	Electrician	Core	CS48
	Instrumentation Technician	Emerging	CS66
	CS65 Automation / PLC Technician	Emerging	CS65

Quality Assurance and Fibre Classification	Wool Classer	Scale dependent	SSWOL07
	Laboratory Technician	Scale dependent	CS81
	Quality Systems and Traceability Coordinator	Emerging	CS82
Environment Protection and Sustainability	Effluent Treatment Plant Operator	Emerging	SSLPR10
Support and seasonal roles	Yard Hand / Cleaner	Core	SSWOL08
	Seasonal Labourer	Core	SSWOL09

11.7 Scalability

The occupational framework reflects the industry's extreme consolidation and the limited number of facilities, with the workforce structure shaped by plant scale and automation rather than by firm size. In a single-site, consolidated operation such as AWP, roles are often combined. Workers may perform multiple functions across production, maintenance support, and logistics. Management structures are lean, with limited specialisation. If operations were to expand or diversify, greater role specialisation could emerge, particularly in engineering, quality assurance, and digital systems management. However, given current industry conditions, scalability is constrained.

Section 12: Natural and synthetic textile manufacturing sector

12.1 Industry definition and scope

The Natural and Synthetic Textile Manufacturing sector is an upstream manufacturing sector within Australia's textile, clothing and footwear industry. The sector comprises businesses engaged in spinning natural and synthetic yarns, manufacturing woven, knitted, and nonwoven fabrics, and producing technical and specialised textile fabrics from natural, synthetic, and blended fibres.

The sector supplies textile inputs to a range of downstream industries, including apparel manufacturing, furnishing textiles, technical textiles, defence, transport, construction, agriculture, mining, and medical products manufacturing.

The sector includes three manufacturing segments:

- Natural and Synthetic Yarn Spinning
- Natural and Synthetic Fabric Manufacturing
- Technical and Specialised Textile Fabric Production.

The Natural and Synthetic Yarn Spinning segment comprises the processing of fibres into yarns and threads through spinning, twisting, winding and related preparation processes. Production includes yarns manufactured from natural fibres such as wool, cotton, hemp and flax, synthetic fibres including polyester, nylon, acrylic and polypropylene, and blended fibres combining natural and synthetic materials. Production processes include fibre preparation, carding, combing, drawing, spinning, twisting, winding and yarn finishing. Production ranges from bulk yarns through to specialised industrial and performance yarns.

The Natural and Synthetic Fabric Manufacturing segment comprises the conversion of yarns into fabrics through weaving, knitting and non-woven production technologies. Production includes woven fabrics, knitted fabrics, industrial and narrow fabrics, non-woven fabrics, coated and laminated fabrics and finished textile materials for downstream conversion. Manufacturing processes include loom weaving, warp knitting, circular knitting, needle punching, thermal bonding, coating, laminating, dyeing, finishing and fabric treatment processes.

The Technical and Specialised Textile Fabric Production segment comprises the manufacture of engineered textile materials designed to achieve defined technical or performance outcomes. Products include geotextiles, filtration fabrics, medical and hygiene textiles, defence and protective textiles, composite reinforcement fabrics, coated industrial fabrics, transport textiles, fire-resistant and high-performance textiles, agricultural textiles and advanced textile materials used in infrastructure and

industrial systems. These products are commonly manufactured using natural, synthetic, and blended fibres, combined with specialised coatings, laminates, treatments, and engineered fabric structures.

Cotton ginning and wool scouring are excluded from this section and are addressed in sections 10 and 11 of this report, respectively.

12.2 Economic Contribution

The three segments highlighted in this section are key parts of Australia's Synthetic and Natural Textile Manufacturing industry, which IBISWorld estimated will generate approximately $572.8 million in revenue in 2026–27 and employ 1,227 people across 125 companies.

The sector comprises a relatively small number of highly specialised manufacturers, many operating in niche markets that require high-level skills, customisation, quality assurance, and rapid production turnaround. The businesses in this sector are mainly small to medium-sized enterprises.

Economic activity is concentrated in higher-value production rather than in bulk textile manufacturing. Domestic producers compete less on volume and price and more on technical performance, product customisation, compliance requirements, rapid delivery, specialised materials expertise, and integration with downstream manufacturing and industrial systems.

The technical textiles segment has become particularly important, with manufacturers supplying products for the defence support, mining, transport, infrastructure, medical, construction, and agriculture industries.

12.3 Key Trends and Drivers

Natural and synthetic yarn spinning

Australian yarn spinning is in long-term structural decline due to import competition, high operating costs and the decline of the apparel manufacturing sector.

Large-scale yarn production has shifted offshore, particularly to Asia. Domestic spinning activity is concentrated on specialised, technical, wool and natural-fibre yarns, blended yarns, and shorter production runs.

Demand for high-quality natural fibre yarns continues to support parts of the sector, particularly where Australian wool quality, traceability and sustainability are valued.

There is also growing interest in recycled and sustainable yarn production, including recycled polyester, regenerated fibres and lower-impact natural fibre blends.

Natural and Synthetic Fabric Manufacturing

Fabric manufacturing faces strong import competition across bulk woven and knitted textiles. Domestic production has shifted towards shorter-run, specialised, and higher-value fabric manufacturing.

Manufacturers tend to focus on industrial fabrics, narrow fabrics, coated fabrics, performance textiles, customised fabric development and rapid-response manufacturing capability.

Automation and digital production technologies are becoming important, including automated weaving systems, advanced knitting technologies, digital fabric design, automated inspection systems and precision finishing technologies.

Technical and specialised textile fabric production

Technical textiles is the strongest growth segment within the sector. Demand is being driven by increased use of engineered textile materials across infrastructure, defence, mining, agriculture, transport, environmental management, and medical sectors.

Australian manufacturers are increasingly specialising in high-performance textile applications that require flame and abrasion resistance, filtration, chemical resistance, tensile strength, UV resistance, waterproofing, antimicrobial performance and composite compatibility.

Growth in sovereign manufacturing capability, defence procurement and infrastructure resilience is also supporting demand for locally manufactured technical textile products.

12.4 Transformation priorities

Natural and synthetic yarn spinning

Transformation priorities in yarn spinning focus on moving from large-scale production to specialised and value-added yarn manufacturing.

Key priorities include investment in advanced spinning technologies, development of sustainable and recycled yarn systems, expansion of premium natural fibre capabilities, improved automation and process control, enhanced fibre traceability systems, and development of technical and engineered yarn products.

Workforce skill development is critical, particularly in machine operation, fibre science, quality systems and production troubleshooting.

Natural and Synthetic Fabric Manufacturing

Transformation priorities in fabric manufacturing focus on advanced production capability, flexible manufacturing and technical performance.

Key priorities include the adoption of advanced weaving and knitting technologies, digital production, and short-run manufacturing capability, improved finishing and coating technologies and strengthening domestic supply chain capability.

Manufacturers are also seeking to improve energy efficiency, reduce waste and increase sustainability performance.

Technical and specialised textile fabric production

Transformation priorities for technical textiles focus on innovation, engineering capability and advanced materials development.

Key priorities include developing high-performance textile systems, integrating coatings, laminates and composite materials, expanding domestic manufacturing capability, increasing collaboration with defence, infrastructure and other industrial sectors, investing in textile testing and certification, and advancing skill development and research and development in advanced textile materials.

Sustainability and circular-economy capabilities are becoming important, including recycled technical textiles, reusable industrial fabrics, and lower-impact manufacturing systems.

12.5 Future growth areas

Natural and synthetic yarn spinning

Future growth opportunities are most likely in premium wool and natural-fibre yarns, recycled and regenerated yarn systems, technical yarns, specialised blended yarns, performance yarns, and traceable and sustainability-certified yarn products.

Natural and Synthetic Fabric Manufacturing

Future growth in fabric manufacturing is most likely across industrial fabrics, coated and laminated textiles, narrow fabrics, specialised knitted fabrics, customised short-run production and advanced non-woven materials. Growth opportunities are also expected in products linked to infrastructure, transport, medical products and industrial manufacturing.

Technical and Specialised Textile Fabric Production

Technical textiles are the sector's strongest long-term growth area. Key growth markets include defence textiles, filtration systems, geotextiles, medical textiles, protective textiles, transport textiles, agricultural textiles, composite reinforcement materials and environmental and infrastructure textile systems. Growth is also expected in smart textiles, advanced composite materials and sustainable technical textile applications.

12.6 Occupational Framework

The occupational framework reflects the structure and operating characteristics of Australia's natural and synthetic yarn and fabric production sector. The sector is relatively small, highly specialised and predominantly SME-based, with many businesses operating in niche manufacturing markets that demand technical capability, production flexibility and rapid responses to customer requirements. As a result, workforce structures differ significantly from those in large-scale offshore textile manufacturing industries.

Across much of the Australian sector, employees commonly undertake multi-skilled roles spanning production, maintenance, quality control, scheduling, technical support and customer interaction. This is particularly evident in smaller enterprises that produce specialised yarns, industrial fabrics and technical textile products in shorter production runs. In these businesses, operational flexibility and broad technical capability are key workforce characteristics.

The framework also reflects the growing importance of technical and specialised textile manufacturing. Growth in engineered textile materials, coated and laminated fabrics, filtration textiles, medical textiles, geotextiles and defence-related textile applications is increasing demand for occupations associated with technical production, testing, compliance, and advanced manufacturing systems.

At the same time, the framework recognises that occupational specialisation generally increases with enterprise scale. Larger, more vertically integrated manufacturers are more likely to maintain distinct functions across operations management, technical product development, engineering, laboratory testing, compliance, and production supervision.

The framework should therefore be seen as representing the core occupational functions required across the sector rather than standalone positions in all businesses.

Table 14: Occupational Framework and Skill Profiles – Natural and Synthetic Textile Manufacturing

Function	Occupation	Status	Skill Profile
Management - larger scale	Managing Director / CEO / Owner	Core	CS13
	Operations Coordinator	Core	CS85
Management - smaller scale	Owner Operator / Business Proprietor / Workshop Owner / Studio Director	Core	CS44
Human Resources and Workforce Development	Manager – Human Resources and Workforce Development	Scale dependent	CS04
	Training and Standards Lead	Scale dependent	CS40
Digital Systems	Manager – Technology and Digital Systems	Scale dependent	CS09

	IT Systems Support Officer	Scale dependent	CS11
Sales and Customer Service	Manager – Sales and Marketing	Scale dependent	CS08
	Sales Representative	Core	CS58
	Customer Service Officer / Assistant	Core	CS37
Business and Administration	Manager - Finance and Administration	Scale dependent	CS60
	Administration Officer	Scale dependent	CS01
Technical Product Development	Product Development Specialist / Textile Technologist	Core	SSNST01
	Technical Textile Designer	Core	SSNST02
	CAD Technician	Scale dependent	CS75
Production Management	Production Manager	Core	CS18
	Production / Shift Supervisor	Core	CS46
	Production Team Leader / Line Leader	Scale dependent	CS45
Yarn Production	Multiskilled Fibre Preparation and Spinning Operator	Core	SSNST03
	Multiskilled Yarn Dyeing Operator	Core	SSNST13
Fabric production	Multiskilled Fabric Production Operator / Loom Operator	Core	SSNST04
	Multiskilled Fabric Dyeing Operator	Core	SSNST11
	Multiskilled Fabric Printing Operator	Core	SSNST14
	Multiskilled Fabric Finishing Operator	Core	SSNST12
Technical Textile Production	Multiskilled Technical Textile Production Operator	Core	SSNST05
	Coating and Lamination Operator	Core	SSNST06
	Textile Finishing Operator	Core	SSNST07
Post-Production Finishing Operations	Finishing Machinist	Scale dependent	SSNST10
Quality, safety, testing and compliance	Quality Assurance Coordinator	Core	CS21
	Quality Control Inspector	Core	CS22
	Textile Testing Technician	Scale dependent	SSNST08
	WHS Coordinator	Core	CS34

Maintenance and Process Support	Maintenance Supervisor	Scale dependent	CS12
	Textile Machinery and Process Technician	Scale dependent	SSNST09
Logistics and Distribution	Procurement / Supply Chain Specialist	Scale dependent	CS38
	Dispatch / Distribution Coordinator	Scale dependent	CS53
	Warehouse Operator	Core	CS73
Sustainability	Sustainability and Circular Economy Specialist	Emerging	CS29

12.7 Scalability

The sector includes small specialist textile manufacturers, vertically integrated textile producers and larger technical textile manufacturers supplying industrial, infrastructure, defence and medical markets.

In smaller enterprises, the workforce is usually highly flexible, with employees undertaking multiple operational and technical responsibilities. Workers commonly perform tasks across fibre preparation, spinning, weaving, knitting, coating, finishing, quality inspection, machine setup, production troubleshooting, dispatch and customer coordination. In many SMEs, owner-managers also handle production scheduling, procurement, technical sales and operational management.

As enterprise scale increases, job roles become more specialised. Larger businesses are more likely to maintain dedicated roles in production management, engineering support, technical product development, laboratory testing, compliance management, maintenance, logistics and supply-chain coordination. Technical textile manufacturers supplying regulated or performance-critical markets may also require specialised testing, certification and quality assurance functions.

The technical and specialised textiles segment is expected to drive greater workforce differentiation over time. Growth in advanced textile applications, coated and composite materials, engineered textile systems and automated production technologies is likely to increase demand for higher-level technical capabilities in materials science, textile technology, production optimisation, testing and compliance.

Despite this increasing technical sophistication, multi-skilled operational roles are likely to remain a defining feature, given the relatively small scale of most businesses, the prevalence of customised and short-run production, and the need for operational flexibility.

The scalability of the occupational framework reflects both the current SME-dominated structure of the sector and its likely transition towards more technically specialised and manufacturing in the future.

Section 13: Rope, cordage and twine manufacturing sector

13.1 Industry definition and scope

The Rope, Cordage and Twine Manufacturing sector is a specialised segment of Australia's broader textile manufacturing industry. It comprises firms that manufacture rope, cordage, twine, netting and related products from both natural and synthetic fibres. Wire rope and tyre cord are not included in this sector.

Activities within the sector include the production of both standard and customised products. These include industrial rope, marine and mining rope, agricultural twine, safety netting, cargo netting and telecommunications rope products. These products are used as intermediate inputs in manufacturing and construction, and as finished goods for retail, industrial and recreational use.

The sector is dominated by small and medium-sized enterprises (SMEs), with low market concentration and no dominant major player. Key firms include Tapex, Whittam Ropes, Donaghys, Custom Braid, Rope Makers Australia and Austral Rope & Cordage.

The industry is characterised by labour-intensive but increasingly automated production processes. There is a growing emphasis on customisation, durability and performance to compete with imported products.

13.2 Economic contribution

The Rope, Cordage and Twine Manufacturing sector is a relatively small yet important contributor to Australia's manufacturing base. IBISWorld (2024) estimates that in 2023–24 the industry generated $179.6 million in revenue, employed 476 people and comprised 60 businesses. The sector's profit was estimated at $21.9 million (IBISWorld 2024).

Revenue streams in the sector include the manufacture and sale of rope, cordage, twine and netting, as well as the custom fabrication and finishing of these products. Firms supply a range of downstream industries, including mining, construction, agriculture, marine and transport. In addition to industrial supply, the sector also supplies retail and wholesale consumer and trade products and exports to nearby Asia-Pacific markets.

Beyond direct economic output, the sector contributes to the broader economy by supporting safety-critical industries such as construction, mining and marine operations. It enables local supply of industrial textiles, provides regional

manufacturing employment, and supports key sectors such as agriculture, logistics and infrastructure.

The industry is concentrated in Queensland, Victoria and New South Wales. This reflects proximity to key downstream markets, particularly mining, agriculture and manufacturing.

13.3 Key trends and drivers

The sector faces significant challenges, particularly from low-cost imports, which account for an increasing share of domestic demand.

Demand for rope, cordage and twine products is driven by several downstream industries, including construction and mining, manufacturing, retail and hardware, transport and logistics, and agriculture and marine sectors.

Key trends shaping the sector include rising import competition from Asia, a shift by local firms towards specialised and high-value products, greater adoption of automation technologies, and ongoing increases in input costs such as oil and cotton. Exchange rates and international trade conditions continue to influence costs and competitiveness.

The workforce is increasingly required to be multi-skilled. Employees often work across production, fabrication and logistics functions within integrated manufacturing facilities.

13.4 Transformation priorities

Transformation priorities for the sector focus on improving competitiveness, introducing automation and developing skills.

Key priorities include strengthening advanced manufacturing capabilities through automation and flexible production systems, expanding customised and value-added production (particularly for safety-critical applications), and developing workforce skills with an emphasis on multi-skilling.

There is also a need to improve business capability in areas such as inventory management, digital systems and customer engagement. Enhancing quality assurance and compliance systems is critical, particularly for firms supplying regulated or safety-critical industries.

Sustainability is an emerging focus area, including improvements in material efficiency, product durability and product lifecycle outcomes.

13.5 Future growth areas

Future growth in the sector is expected to focus on higher-value and specialised product segments rather than lower-value, bulk production.

Key growth areas include safety netting and fall protection systems, high-performance rope for mining, marine and industrial applications, agricultural and aquaculture netting, telecommunications and infrastructure rope products, and customised solutions for niche markets.

These opportunities are supported by demand for safety-compliant products, expansion in key downstream industries, and export potential in Asia-Pacific markets. However, overall industry growth is expected to be modest due to continued import competition.

13.6 Occupational framework

The occupational framework for the Rope, Cordage and Twine Manufacturing sector outlines the main functional areas and associated occupations, reflecting the structure of a small-scale, multi-skilled manufacturing workforce.

Table 15: Occupational Framework and Skill Profiles – Rope, Cordage and Twine Manufacturing Sector

Function	Occupation	Status	Skill Profile
Management	Managing Director / CEO / Owner	Core	CS13
	Director – Operations / COO / General Manager / Operations Manager	Scale dependent	CS05
Sales and Customer Service	Manager – Sales and Marketing	Scale dependent	CS08
	Sales Representative	Scale dependent	CS58
	Customer Service Officer / Assistant	Core	CS37
Finance and Administration	Manager - Finance and Administration	Scale dependent	CS60
	Administration Officer	Core	CS01
Product Design and Development	Product Developer - Rope, Cordage and Twine	Scale dependent	SSROP01
Production Management	Production Manager	Core	CS18
	Production / Shift Supervisor	Scale dependent	CS46
Production Operations	Production Operator - Rope, Cordage & Twine	Core	SSROP02
	Fabrication and Finishing Operator	Core	SSROP03
	Production Assistant	Core	CS61

Maintenance	Maintenance Supervisor	Scale dependent	CS49
	Maintenance Technician	Scale dependent	CS50
Quality and Compliance	Quality Assurance Coordinator	Scale dependent	CS21
	WHS Coordinator	Scale dependent	CS34
Supply chain management	Procurement / Supply Chain Specialist	Core	CS38
	Dispatch / Distribution Coordinator	Scale dependent	CS53
	Warehouse Operator	Core	CS73

13.7 Scalability

The occupational framework reflects the sector's structure, which is dominated by small and medium-sized enterprises.

In small businesses, roles are highly integrated. Individuals commonly combine responsibilities across production, finishing, warehousing, customer service and administration.

In larger organisations, roles become more specialised across functions such as production management, quality assurance, technical support and business development.

This scalability supports workforce flexibility and career progression, allowing workers to move from broad, multi-skilled roles in small firms to more specialised or managerial positions in larger organisations.

Section 14: Cut and sewn textile manufacturing sector (Non-garment)

14.1 Industry definition and scope

The Cut and Sewn Textile Manufacturing sector is a non-garment sector of Australia's textile, clothing and footwear industry. It comprises businesses that convert textile materials into finished or semi-finished products through cutting, shaping and assembly.

While historically centred on sewing, the sector now encompasses a broad range of fabrication techniques, including high-frequency welding, ultrasonic welding, heat sealing, bonding, lamination and composite assembly. These processes support the production of both traditional textile goods and high-performance systems where durability, strength and compliance are critical.

The sector produces a diverse range of goods, including household textiles such as bed linen, curtains and cushions, alongside technical and specialised products. These include architectural shading systems, outdoor and structural textiles, sails and other marine applications, and flexible containment and lining systems. Many products incorporate coated, reinforced or composite materials and are designed for use in construction, agriculture, infrastructure, marine and industrial environments.

Production ranges from off-the-shelf manufactured products to low-volume, customised and project-based fabrication. Firms commonly integrate multiple processes and materials, combining textile fabrication with reinforcement, coating and hardware integration to meet specific requirements.

The sector comprises a mix of small specialist workshops and larger manufacturers. It uses a mix of traditional fabrication skills and advanced manufacturing technologies, and maintains strong links with the construction, defence, infrastructure, agriculture, and marine sectors.

14.2 Economic contribution

The sector forms part of Australia's textile product manufacturing industry), which generated approximately $2.08 billion in sales and service income in 2023–24, according to the Australian Bureau of Statistics. Industry value added is estimated at $776 million, with total wages and salaries of around $440 million, supporting approximately 7,800 employees (IBISWorld 2023).

According to IBISWorld (2023), the industry comprises about 780–790 businesses employing just over 8,200 people, highlighting its mainly SME- structure.

Within this broader industry, cut-and-sewn textile manufacturing contributes through both product manufacturing and project-based fabrication services. Higher-value activity is associated with customised fabrication for construction, infrastructure, and industrial applications, where products are often integrated into broader systems and projects.

The sector's economic role is closely tied to these downstream industries, with activity influenced by construction cycles, infrastructure investment and industrial demand. In addition, the sector provides capability-based value through the domestic production of flexible, deployable textile systems for defence, emergency response and disaster recovery.

14.3 Key trends and drivers

The sector is undergoing structural adjustment due to import competition, shifting demand patterns and changing skill requirements.

Imports remain high across standard product categories, particularly in household textiles and basic furnishings. This limits domestic manufacturing volume and reinforces a long-term shift towards higher-value activity.

Firms are increasingly focusing on technical textiles and custom-fabricated systems. These products are less exposed to import competition and benefit from requirements for local design, regulatory compliance and quick delivery.

Demand is closely linked to the construction, infrastructure, agriculture, marine and industrial sectors, especially project-based work. Residential construction and renovation influence demand for interior and shading products, while industrial and infrastructure activity drives demand for coated and protective textile applications.

A further driver is the growing importance of domestic manufacturing capability in areas such as defence and emergency response. These markets require reliable local supply, rapid turnaround and the ability to deliver customised solutions.

Technological change is supporting this transition. Adoption of digital design systems, automated cutting and advanced joining technologies is improving efficiency and enabling more complex fabrication, while increasing demand for higher-level technical skills.

14.4 Transformation priorities

Transformation priorities are focused on reinforcing the sector's position as a skill-driven, high-value manufacturing industry.

A key priority is the continued move towards technical textiles and multi-process fabrication, including building integrated capabilities in sewing, welding, bonding and composite assembly.

Investing in advanced manufacturing technologies is also critical. Adopting digital design systems, automation, and precision-fabrication equipment supports productivity gains and enables the production of more complex, customised products.

Developing workforce skills is a key priority. The sector requires a workforce that combines traditional fabrication skills with technical competencies, including machine operation, digital systems, materials knowledge and quality assurance. Strengthening training pathways and improving workforce attraction and retention are critical.

Improving supply chains is another priority. Reducing reliance on imported inputs and strengthening local supplier networks enhance the sector's capacity to respond to disruptions and meet time-critical demand.

Additional priorities include supporting sustainability and materials innovation, improving SME capability in compliance and digital systems, and strengthening access to export markets for specialised, high-value products.

14.5 Future growth areas

Future growth is expected to be concentrated in specialised and customised products.

Opportunities are emerging in architectural and shading systems, including blinds, awnings and shade structures, as well as in technical and coated textile applications across industrial, agricultural and infrastructure settings.

Marine and transport textiles, including sail systems and protective covers, remain in demand. Flexible containment and lining systems, such as pool liners and engineered textile linings, are also expected to grow.

Custom fabrication for commercial and infrastructure projects is likely to expand as demand for tailored, high-performance products rises.

A significant growth area is defence and emergency service applications, including deployable shelters, protective covers and load-bearing textile systems that require reliability, adaptability and rapid local production.

Sustainability is increasingly important, creating opportunities in recycled materials and lower-impact textiles.

14.6 Occupational framework

The occupational framework is presented as a set of distinct occupations that may be found in both larger and smaller companies within the sector. However, in most SMEs, these functions are combined into a smaller number of multi-skilled positions.

In SMEs, owner-managers and senior staff frequently undertake overlapping responsibilities across production, project coordination, customer engagement, design and estimation, supported by a workforce of multi-skilled fabrication operators capable of working across cutting, sewing, welding and assembly processes. Specialist roles in areas such as digital systems, engineering, compliance and sustainability are often embedded within broader positions or accessed externally.

The framework should therefore be interpreted as representing core functions required across the sector, rather than discrete roles in all businesses, with role consolidation and flexibility as defining features of workforce organisation in this industry

Table 16: Occupational Framework and Skill Profiles – Cut and Sewn Textile Manufacturing Sector (Non-Garment)

Function	Occupation	Status	Skill Profile
Management - larger scale	Managing Director / CEO / Owner	Core	CS13
	Director – Operations / COO / General Manager / Operations Manager	Scale dependent	CS05
	Director – Finance and Corporate Services / CFO / Head of Finance / Financial Controller	Scale dependent	CS03
Management - smaller scale	Managing Director / CEO / Owner	Core	CS13
	Operations Coordinator	Core	CS85
Human Resources and Workforce Development	Manager – Human Resources and Workforce Development	Scale dependent	CS04
	Training and Standards Lead	Scale dependent	CS40
Digital Systems	Manager – Technology and Digital Systems	Scale dependent	CS09
	IT Systems Support Officer	Scale dependent	CS11
	Enterprise Resource Planning (ERP) Support Officer	Scale dependent	CS64
Sales and Customer Service	Manager – Sales and Marketing	Scale dependent	CS08
	Key Account Manager	Scale dependent	CS59
	Sales Representative	Scale dependent	CS58

	Textiles Product Estimator	Scale dependent	SSTMC12
	Customer Service Officer / Assistant	Core	CS37
Administration	Administration Officer	Scale dependent	CS01
	Manager - Finance and Administration	Scale dependent	CS60
Project Delivery	Project Manager [Fabrication and Systems]	Scale dependent	SSTMC01
Product Design and Development	Product Development Manager	Scale dependent	SSTMC02
	Technical Designer [Textiles/Systems]	Scale dependent	SSTMC03
	Patternmaker / Digital Patternmaker	Core	CS63
	CAD Technician	Scale dependent	CS75
	Design Engineer	Emerging	SSTMC04
Production Management	Production Manager	Core	CS18
	Production / Shift Supervisor	Core	CS46
	Production Team Leader / Line Leader	Scale dependent	CS45
	Product Lead / Specialist	Scale dependent	SSTMC05
Textile Fabrication - Fabric Preparation and Cutting	Cutting Manager	Scale dependent	SSTMC06
	Cutting Machine Operator	Core	SSTMC07
	Automated Cutting Operator	Scale dependent	CS71
Textile Fabrication - Sewing, Welding and Multi Process Assembly	Industrial Sewing Machine Operator	Core	CS84
	Multi-skilled Fabrication Operator	Scale dependent	SSTMC08
Textile Fabrication - Finishing, Inspection and Packaging	Finishing Operator	Core	SSTMC09
	Quality Control Inspector	Core	CS22
	Packing and Dispatch Operator	Core	CS16
Textile Fabrication - General	Production Assistant	Core	CS61
Installation and Field Services	Installation Supervisor	Scale dependent	SSTMC10
	Installation Technician	Scale dependent	SSTMC11
Quality, safety and compliance	Quality Assurance Coordinator	Core	CS21
	Quality Control Inspector	Core	CS22

	WHS Coordinator	Core	CS34
Maintenance and Technical support	Maintenance Supervisor	Scale dependent	CS12
	Maintenance Technician	Scale dependent	CS50
	Sewing Machine Technician	Scale dependent	CS25
Logistics and Distribution	Procurement / Supply Chain Specialist	Scale dependent	CS38
	Dispatch / Distribution Coordinator	Scale dependent	CS53
	Warehouse Operator	Core	CS73
Sustainability	Sustainability and Circular Economy Specialist	Emerging	CS29

14.7 Scalability

The sector encompasses both small specialist fabrication businesses and larger integrated manufacturers.

In smaller firms, roles are typically multi-functional, with workers undertaking a range of activities across cutting, sewing, welding, assembly and customer-facing functions. In larger organisations, roles are more specialised across production, technical fabrication, quality assurance, product development and supply chain management.

This scalability supports workforce flexibility, career progression and the sector's ability to transition toward more advanced, high-value manufacturing activities.

Section 15: Conclusion

15.1 The contemporary TCF industry in Australia

This report shows that Australia's Textile, Clothing and Footwear (TCF) industry remains a highly diverse, technically sophisticated, and strategically important part of the national economy, despite the long-term structural decline in large-scale domestic manufacturing. The industry continues to underpin essential economic, industrial, social, and service functions across sectors such as manufacturing, healthcare, defence, construction, agriculture, mining, and hospitality.

The industry spans a broad range of interconnected sectors, including apparel, leather, and footwear manufacturing; laundry and dry cleaning services; clothing and footwear repair and alteration services; technical textile production; and textile recycling and remanufacturing. Across these sectors, businesses undertake activities spanning fibre processing, fabric production, product development, technical design, garment and footwear manufacturing, textile fabrication, repairs, restoration, recycling, logistics, and customer service.

The research undertaken for this project confirms that the contemporary TCF industry is no longer centred on large-scale, labour-intensive commodity manufacturing. Rather, the industry derives its value from specialised technical capability, advanced manufacturing systems, product development, design expertise, service delivery, customisation, quality assurance, rapid turnaround, and integration with downstream industries.

The report also shows that the TCF industry is skills-intensive. Across all sectors, businesses rely on a mix of traditional trade skills, technical production expertise, engineering knowledge, materials science, quality systems, digital systems capabilities, automation, logistics coordination, customer service capabilities, and specialised craft skills. Increasingly, occupations require hybrid skills that combine technical and trade skills with digital technologies, automation, sustainability practices, advanced materials knowledge, and data-enabled production systems.

Importantly, the occupational mapping undertaken through this project demonstrates that the future of the TCF industry will continue to depend not only on emerging technical and digital capabilities, but also on maintaining strong foundations in traditional trade, technical and artisanal skills. Across many sectors, there remains ongoing demand for experienced sewing machinists, textile mechanics, maintenance technicians, patternmakers, leatherworkers, footwear technicians, repair specialists,

laundry operators, textile processing workers, and machinery operators with deep practical production knowledge.

The research highlights that many traditional occupations are not disappearing; rather, they are evolving. Workers increasingly need a blend of hands-on technical and operational expertise and the ability to work with digital systems, automated equipment, programmable machinery, quality and traceability systems, and advanced production technologies. This is particularly evident in sectors such as apparel and footwear manufacturing, textile production, wool processing, technical textiles, and laundry and dry cleaning services. It is also evident that there are significant skills shortages in many of these areas and that new approaches are needed to attract and retain new entrants and to assist existing workers in transitioning to these important areas of employment.

The occupational frameworks and associated Skill Profiles developed through this project highlight the breadth and complexity of occupations across the industry. They demonstrate that workforce capability extends well beyond traditional manufacturing roles to include technical product development, engineering support, advanced machinery operation, CAD and digital systems, laboratory and testing functions, sustainability and traceability systems, logistics and supply chain coordination, customer-facing repair and restoration services, and advanced technical textile production.

The research confirms that many sectors of the TCF industry are undergoing major structural change. High-volume, price-driven manufacturing segments face intense import competition and ongoing contraction, driven by globalised supply chains and offshore production.

At the same time, growth opportunities are emerging in higher-value and specialised market segments. Technical textiles are emerging as one of the strongest long-term growth sectors, with applications across defence, infrastructure, transport, healthcare, mining, agriculture, and environmental management. Growth is also occurring in technical apparel, protective clothing, engineered textile systems, circular-economy activities, repair and remanufacturing services, and sustainable production systems.

However, the report also shows that the industry's ongoing operations continue to rely heavily on operator- and production-level occupations. This is particularly important in the laundry and dry cleaning sector, which remains one of the largest employing sectors within the broader TCF industry and continues to provide substantial operational and entry-level employment opportunities. Commercial laundry operations continue to require large numbers of process workers, machine operators, sorters, dispatch workers, maintenance personnel, and supervisors capable of operating increasingly automated and technology-enabled processing systems.

Although these operations are becoming more automated and data-driven, they still depend heavily on practical operational capability, workflow management, machinery

operation, maintenance support, quality assurance, and workforce reliability. The occupational mapping shows that future workforce planning must address both high-level technical capability and the ongoing need for skilled operator-level personnel across the TCF sectors.

15.2 Transformation drivers and future workforce capability requirements

The report identifies several major forces reshaping the sector and influencing future workforce capability requirements.

Globalisation and structural adjustment

Globalisation and import competition continue to shape the TCF industry. Large-scale commodity manufacturing has progressively shifted offshore, reducing domestic production in labour-intensive market segments. In response, Australian businesses are increasingly focusing on specialised, high-value, low-volume production models that emphasise technical skills, responsiveness, and product differentiation.

Technological transformation

Digital technologies, automation, advanced machinery, CAD systems, automated cutting technologies, digital design tools, predictive maintenance systems, automated inspection systems, and data-driven production systems are transforming the industry. Consequently, there is a rising demand for workers equipped with both technical and digital skills.

Sustainability and circular economy pressures

Sustainability and circular economy considerations are central to industry transformation. Businesses are investing in sustainable fibres, recycled materials, lower-impact manufacturing systems, traceability systems, resource efficiency, recycling capabilities, and environmentally responsible production practices. Circular economy skills are particularly important for repair, refurbishment, textile recycling, remanufacturing, and sustainable technical textile production.

Supply chain resilience and sovereign capability

The COVID-19 pandemic, the oil supply crisis caused by conflict in the Strait of Hormuz, and broader global supply chain disruptions have highlighted the importance of maintaining domestic manufacturing capability and supply systems. This has increased focus on sovereign capability across areas such as technical textiles, defence supply, biomedical textiles, industrial products, and emergency-response systems.

Workforce and demographic pressures

Workforce capability remains one of the industry's most significant challenges. Many sectors face ageing workforces, declining numbers of experienced tradespeople and technicians, limited entry-level training pathways, and shortages of specialised technical skills.

The report emphasises that the sector's future competitiveness will depend heavily on workforce skill development and the industry's capacity to attract, train, retain, and upskill workers at all occupational levels – from advanced technical specialists to machinists, operators, maintenance staff, process workers, and service personnel.

Across nearly all sectors, transformation priorities consistently focus on:

- Strengthening advanced manufacturing capability
- Improving digital and automation capability
- Supporting workforce renewal and training pathways
- Increasing sustainability and circular economy capability
- Improving supply chain resilience
- Supporting innovation and product development
- Enhancing technical and trade skills
- Strengthening compliance, quality assurance and traceability systems
- Improving business resilience and adaptability.

15.3 Recommendations

1. Establish an ongoing industry-led process to maintain and update the TCF occupational framework and associated Skill Profiles.
2. Make the occupational framework and Skill Profiles publicly accessible as a national workforce development resource for government, industry, registered training organisations, universities, schools, careers advisers, and enterprises.
3. Use the occupational framework as a foundational evidence base for future review and redevelopment of the MST Textiles, Clothing and Footwear Training Package.
4. Strengthen training products in areas including technical textiles, advanced manufacturing, automation and digital systems, CAD and digital product development, sustainability and circular economy capability, traceability and compliance systems, advanced materials and engineered textiles, and quality assurance and testing capability.
5. Ensure that future training product review and workforce planning activities continue to support traditional trade, technical and operator-level occupations across the TCF industry, including machinists, textile mechanics, maintenance technicians, production operators, laundry

operators, repair specialists, and other practical production and service occupations that remain essential to industry capability.

6. Use the occupational framework to strengthen industry career pathway information by better demonstrating the relationship between entry-level operational roles, technical trade occupations, advanced manufacturing occupations, and higher-level specialist and management roles across the industry.
7. Improve industry promotion and workforce attraction strategies to increase awareness of modern TCF careers, particularly in advanced manufacturing, technical textiles, product development, digital systems, sustainability-related occupations, and essential operational and technical production roles.
8. Strengthen upskilling and reskilling pathways for existing workers to support workforce transition, capability development, and workforce retention.
9. Ensure that qualifications, skill sets and workforce development pathways for trade, technical and artisanal occupations integrate the digital, automation and technology-enabled capabilities increasingly required across the modern TCF industry, while maintaining strong practical and operational skill foundations.

15.4 Concluding observations

The TCF industry should not be viewed simply through the lens of declining mass manufacturing. Rather, it is an evolving industry undergoing significant transformation towards specialised, technically sophisticated, and high-value production and service models.

While some TCF manufacturing activities continue to decline, important growth opportunities are emerging in technical textiles, sustainability-focused manufacturing, digital manufacturing technologies, circular economy activities, and repair and remanufacturing services and laundry services (IBISWorld 2025).

At the same time, the occupational mapping undertaken through this project demonstrates that there remains an ongoing and critical need to maintain traditional trade, technical and artisanal skills across the TCF industry. The industry continues to rely heavily on experienced machinists, sewing operators, textile mechanics, maintenance technicians, process operators, laundry workers, repair specialists, leatherworkers, footwear technicians, textile fabrication workers, and other skilled production personnel whose practical operational expertise remains essential.

Importantly, these occupations are evolving. Workers increasingly need to combine traditional technical and trade skills with the ability to operate automated equipment, digital production systems, programmable machinery, quality systems, and

technology-enabled production environments. The future workforce will therefore require both strong practical production skills and adaptability to technological change.

This is particularly important in sectors such as technical textiles, textile fabrication, wool and fibre processing, leather production and laundry operations, where practical production capability remains fundamental to operational performance and service delivery.

The industry's future success depends not only on supporting advanced technologies and emerging technical capabilities but also on sustaining its foundational operational, technical, and artisanal workforce skills.

Importantly, the occupational framework developed through this project provides a mechanism for continuously identifying emerging occupations, evolving skill requirements, and changing workforce structures across the TCF industry.

The occupational framework and Skill Profiles developed through this project provide an important foundation for achieving these goals and for supporting a more coordinated, evidence-based, and future-focused approach to workforce and skills development across Australia's Textile, Clothing and Footwear industry.

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