Textiles, Clothing and Footwear Workforce Insights Project

Preliminary Desktop Research Findings

Skills Insight

ForestWorks

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Agribusiness, Fibre, Furnishing, Food, Animal and Environment Care
An Australian Government Initiative

Contents

Introduction

This report contains preliminary insights gathered from desktop research as part of the [Textiles, Clothing and Footwear Workforce Insights](#) project. Further qualitative research is being undertaken for the project using consultation meetings and stakeholder surveys. The final project report will include workforce recommendations based on this research and, stakeholder insights and feedback.

According to a pre-COVID19 Industry Reference Committee (IRC-IBSA) Skills Forecast published in 2018[1], the traditional textiles, clothing and footwear (TCF) manufacturer has largely been replaced by sophisticated manufacturers offshoring all or some production work. This shift has left local boutique manufacturers focusing on niche and specialised market segments to carve out their place in the TCF industry.

The impact this has had on a large number of small TCF businesses, the proportion of business with no employees, and the amount of subcontracting, has significantly reduced the industry's ability to invest in domestic training and to develop new and existing staff. The focus of Vocational Education and Training (VET) funding shifted from manufacturing sectors to more visible and attractive occupations like fashion design.

So where does this leave the MST National Training Package (which underwent a review in 2019) attempting to serve the rest of the industry best? Is the situation one where industry no longer relies on the MST training package to address employers and manufacturers' workforce challenges and issues? Did the COVID-19 pandemic trigger industry's ability to invest in training to address TCF workforce challenges and issues?

In May 2020, the Australian Fashion Council (AFC)[2], conducted a survey which gathered information on how their members' businesses were impacted by the COVID-19 crisis; their challenges, needs, priorities, and where they could see any potential opportunities for the sector[3].

The key insight that emerged from the survey[4] was the immediate and unprecedented impact of COVID-19 as being immensely damaging on the TCF industry and its large ecosystem. Seventy-five to eighty percent of member companies agreed the significant disrupted demand was across almost all businesses and all channels. The ACF key message was the COVID19 impact is forcing the TCF industry to rethink the way they do things, as the changes to industry dynamics was significant[5].

Accordingly, the purpose of this research study is to determine how significant these changes are post COVID19, and identify how industry is currently addressing workforce priorities, challenges, labour shortages, and current and future needs. This study will identify what barriers and gaps exist with training and the reliance of the MST training package for workforce challenges. In addition, the research will seek insight to:

- Understand industry activities, structure, size, sub sectors, employer type and location
- Identify urgent/priority industry workforce shortages, challenges and opportunities
- Determine future skills priorities by describing trends in workplace and job needs

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[1] https://ibsa.org.au/wp-content/uploads/2017/04/Textiles-Clothing-Footwear-MST-ISFPSW-May-2018.pdf
[2] https://ausfashioncouncil.com/afc-covid-19-australian-tcf-industry-survey-the-results-are-in/
[3] The survey was directed to business owners, CEO's and those in leadership positions across the Australian TCF value chain, the data was collected providing a total of 182 responses.
[4] https://ausfashioncouncil.com/afc-covid-19-australian-tcf-industry-survey-the-results-are-in/
[5] Ibid.

- Make recommendations prioritising training product development and review activities in a final report to the Australian Government.

An Overview of the TCF industry

Industry Sectors

- Textile manufacturing
- Fashion and apparel manufacturing and fashion
- Leather manufacturing
- Footwear manufacturing
- Laundry and dry-cleaning services
- Alterations and repairs

Businesses

11,500 businesses were part of the TCF industry in 2023, spanning diverse sectors, sub-sectors, and geographical locations. Nearly 60% were non-employing, around 30% had between 1 and 4 employees, and just over 10% had between 9 and 20 employees.[6]

Number of businesses by sector, 2023

Clothing and Footwear Repair 778 (7%)
Textile Manufacturing 2,587 (22%)
Apparel Manufacturing 2,736 (24%)
Leather Manufacturing 410 (4%)
Footwear Manufacturing 162 (1%)
Laundry and Dry Cleaning 4,881 (42%)
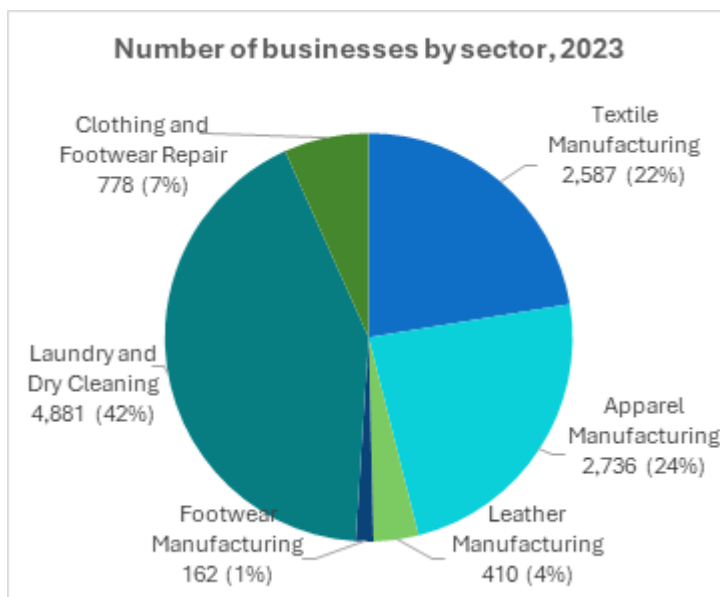
These businesses collaboratively create and deliver essential products for everyday life, such as natural and specialised textiles, leather, garments, footwear, and associated services, including laundry and repairs and alterations of garments and footwear.

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[6] ABS, 2023, 8165.0 Counts of Australian Businesses, Entries and Exits, June 2019 to June 2023

Industry Supply Chain

From Raw Materials for a finished good, a clothing item journeys through several different suppliers on its journey to the consumer. As can be seen in the diagram below these suppliers are arranged into several tiers in the supply chain.

Tier 1 - Encompasses the manufacturers (sometimes referred to 'cut and 'sew' factories) and subcontractors in the production network who work directly with the Trade firms

Tier 2 - The Textile companies who make the fabrics for clothing manufacturing. These can be both a manufacturing and a processing factory at the same time and sell it to other suppliers.

Tier 3 - The Textile companies categorised into natural and synthetic yarn production

Tier 4 - Identifies the raw material suppliers and the network divided into raw materials used in processing natural and synthetic fibres
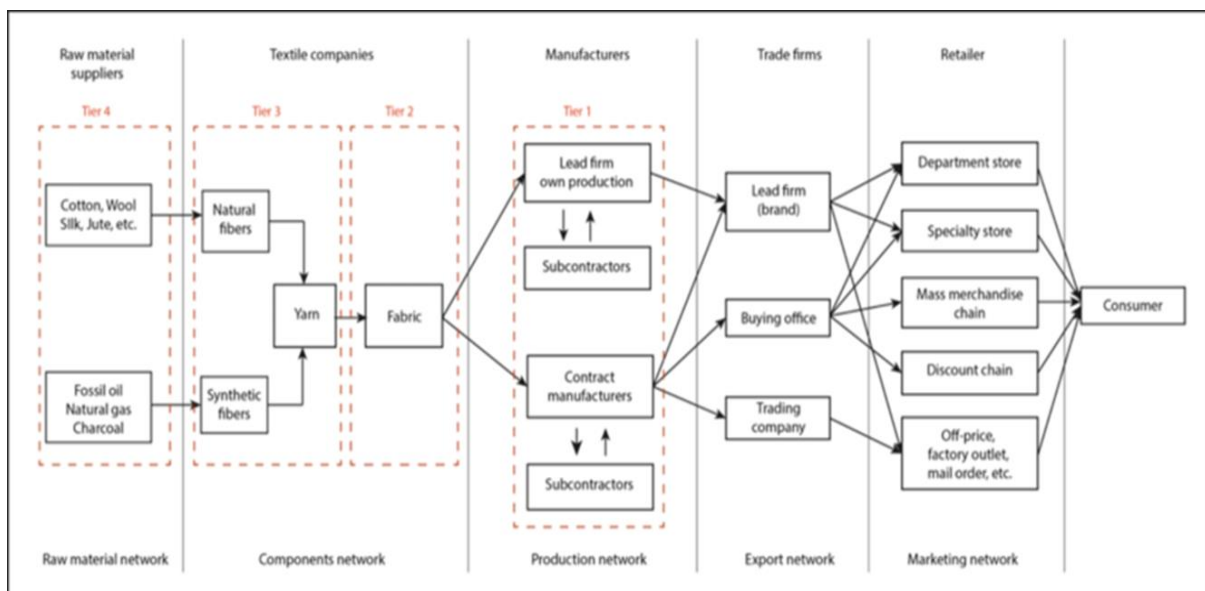
Macroeconomic challenges and opportunities

Challenges[7] [8]

Globally, the TCF industry is confronting several significant challenges, including:

- Economic uncertainty
- Declining consumer confidence

[7] McKinsey & Company 2023, The State of Fashion 2024, www.mckinsey.com, viewed 13 June 2024, <https://www.mckinsey.com/industries/retail/our-insights/state-of-fashion#/>

[8] Australian Fashion Council 2022, Fashion Evolution: From Farm to Industry, viewed 13 June 2024, <https://ausfashioncouncil.com/wp-content/uploads/2022/06/2022-Industry-Modelling-Report.pdf>

- High inflation and interest rates
- Geopolitical instability
- Climate-related risks, potentially disrupting supply chains and impacting jobs.

In Australia, the industry faces these global challenges and additional local issues such as:

- Skilled worker shortages
- Shortage of essential materials
- Transition to circular economy
- Limited manufacturing capacity
- Ongoing impacts from the pandemic-related business interruptions, which have particularly affected the economic security of women in the industry.

Opportunities[9]

- **Improved contingency planning and transparency**: Enhancing supplier relationships to better manage demand fluctuations and regulatory changes.
- **Generative AI utilisation**: Leveraging generative AI for design and product development, despite current preparedness challenges.
- **Brand marketing investment**: Focusing on brand marketing and building emotional connections with consumers, moving beyond performance marketing.
- **Promoting Australian fashion**: Stimulating demand and increasing exports through domestic and international promotion, leveraging the Australian Fashion™ Certification Trademark.
- **Expanding local manufacturing capabilities**: Expanding local manufacturing to support supply chains, enhance productivity, and create jobs, integrating fibre and derivatives into national manufacturing priorities.
- **Workforce upskilling**: Developing targeted apprenticeship and traineeship programs to address skilled worker shortages and support long-term economic security, especially for women.
- **Sustainable practices and technologies:** Investing in sustainable practices, including blockchain technology for provenance validation and material innovation.
- **Government-industry collaboration:** Enhancing collaboration to implement policies that support growth, innovation, promotional campaigns, and sustainability in the sector.

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9 Ibid.

Workforce Demographics

Employment size

39,763 individuals were employed in the TCF industry in 2021.[10]

Note: This and the following workforce data excludes fashion and textile designers, as well as clothing and footwear retail and wholesale operators.

Occupations

The TCF industry covers a diverse range of occupations, reflecting the variety of skills required to sustain its operations. These roles vary from manual and technical positions (specialised roles, specific to TCF production) to managerial and customer service roles (support roles), covering various levels of expertise and responsibility, from entry-level skills to advanced technical and managerial skills.

Approximately 40% (16,600) of the TCF workforce held specialised positions, specific to TCF production, in 2021. The remaining 60% were engaged in essential support functions, such as sales (assistants and managers), production managers, retail managers, stores and logistics, delivery drivers, and general clerks, many common across the various TCF industries.[11]

Among the largest employment groups for the specialised roles in the TCF industry are laundry workers, followed closely by sewing machinists and clothing trades workers, including tailors and dressmakers. Other notable specialised occupations, though employing fewer people, include canvas and leather goods makers, textile and footwear production machine operators, and fashion and industrial designers.

Notably, some of these specialised roles within the TCF industry are also found in non-TCF sectors, including building and other industrial cleaning, aged care, hospitals, clothing retail, and accommodation.

Around 42,900 individuals were employed in these specialised roles nationally across all industries, in 2021. Of these, 40% (16,600 individuals) were directly employed in the TCF sectors, while 50% (22,000 individuals) worked in other industries.[12]   *Note: The remaining 10% (4,300 individuals) either did not state their industry or provided an inadequate description.*

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[10] Census of Population and Housing 2021, TableBuilder, viewed 7 June 2024, <https://tablebuilder.abs.gov.au>.
[11] Ibid.
[12] Ibid.

Workforce diversity

Gender composition

Jobs held by gender, 2021:[13]

18,447
Male (43%)

24,453
Female (57%)

First Nations

1% was the representation of First Nations people in the TCF industry's workforce in 2021.[14]

Culturally and linguistically diverse people

41% (16,300 people) of the TCF workforce were from culturally and linguistically diverse (CALD) backgrounds in 2021, representing various global regions.[15]

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[13] Ibid.
[14] Ibid.
[15] Ibid.

Age distribution
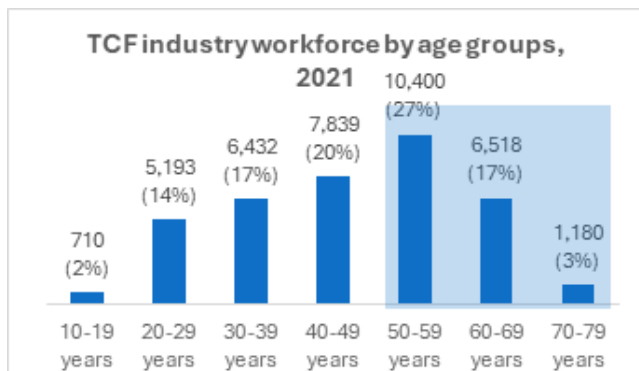
47% (18,098 people) of the TCF industry workforce were between the age of 50 and 79 in 2021.[16]

Education level
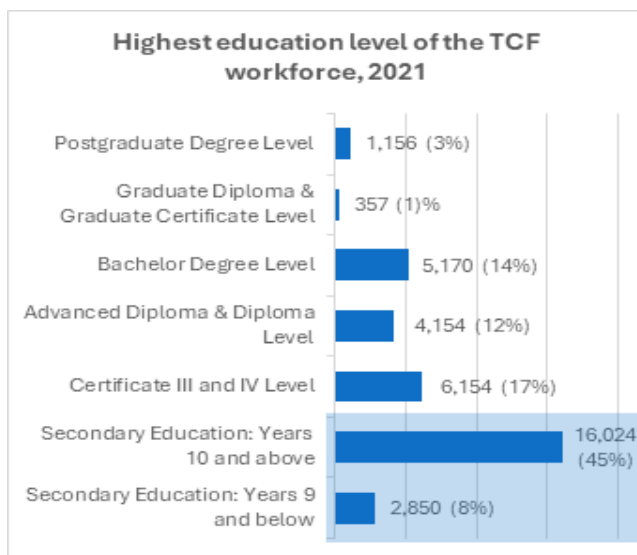
53% (18,864 people) of the TCF workforce have secondary education as their highest level of education. This includes 45% who have completed Year 10 and above and 8% who have completed Year 9 and below.[17]

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[16] Census of Population and Housing 2021, TableBuilder, viewed 7 June 2024, <https://tablebuilder.abs.gov.au>.
[17] Ibid.

Income levels

Income level of TCF workforce, 2021

Income level	
$1-$7,799	
$7,800-$15,599	5%
$15,600-$20,799	7%
$20,800-$25,999	9%
$26,000-$33,799	16%
$33,800-$41,599	22%
$41,600-$51,999	21%
$52,000-$64,999	11%
$65,00-$77,999	4%
$78,000-$90,999	2%
$91,000-$103,999	
$104,000-$155,999	
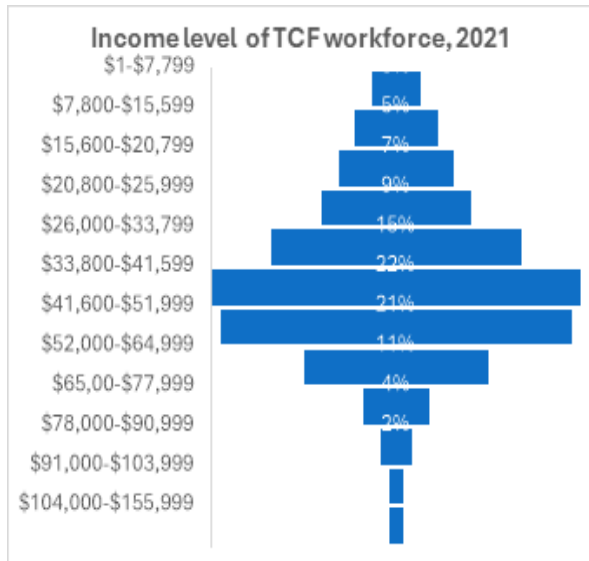
81% of the TCF workforce earned an annual income below $51,999 in 2021[18]

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[18] Ibid.

Workforce Demand

Job vacancies

Online job advertisements for TCF occupations, 2006-2024
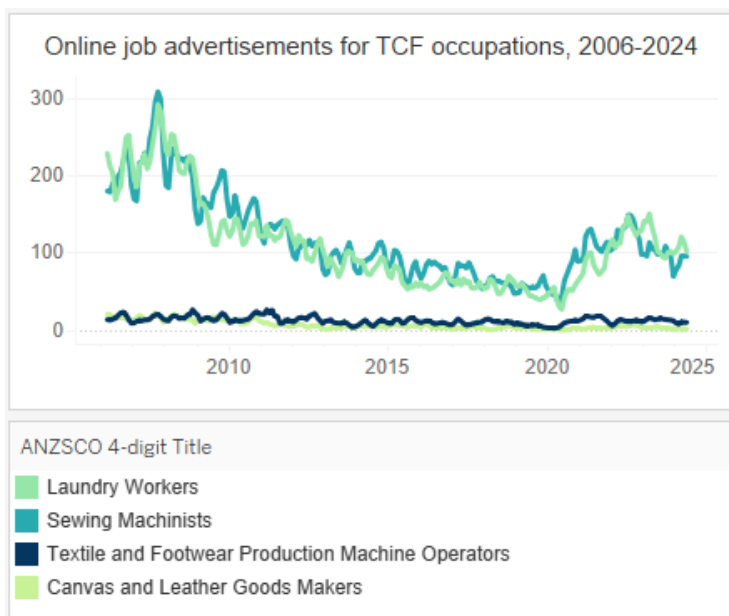
The demand for laundry workers and sewing machinists remains significantly higher than pre-COVID levels, despite a slight decrease in demand for these occupations from 2022 until May 2024. The demand for other occupations has remained stable, with only minor increases post-COVID.[19]

Labour market conditions

During the first half of 2024, the job market has evolved into a more stable environment; however, it remains highly competitive. For employers, this means significant challenges in attracting and retaining skilled workers, particularly in sectors with acute skill shortages.[20]

Employment projections and jobs growth

Employment projections for the TCF industry indicate a growing workforce demand over the next ten years, driven by the macroeconomic and labour market outlook. This growth equates to over 6,000 additional jobs over the next ten years.[21]

The demand for sewing machinists is projected to grow with over 300 additional jobs by 2028 and more than 800 by 2033. Similarly, the demand for laundry workers is expected to see substantial growth, with over 1,000 additional jobs anticipated by 2033.

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[19] Jobs and Skills Australia 2024a, *Internet Vacancy Index*, viewed 18 June 2024, <https://www.jobsandskills.gov.au/data/internet-vacancy-index>.
[20] Ibid.
[21] Jobs and Skills Australia 2023, *Employment Projections*, viewed 18 June 2024, <https://www.jobsandskills.gov.au/data/employment-projections>.

Retirement projections

The total projected retirements in the TCF industry are approximately 9,600 workers between 2022 and 2027, with an additional 7,300 workers, or potentially more, retiring between 2028 and 2032. [22]

Skills and Labour shortage

There is a significant and ongoing shortage of skilled workers in the TCF industry, as evidenced by industry reports[23] and analysed data. This shortage impacts the industry's ability to meet demand and innovate.

Contributing factors:

》》》 **Market demand for Australian TCF products:** A predicted rapid industry expansion, combined with other factors, could outpace the availability of skilled labour regionally or nationally, creating a gap between the demand for workers and the supply.

》》》 **Workforce demographics / aging workforce:** The industry has a low representation of younger workers, with only 14% aged 20-29 and just 2% aged 15-19. Additionally, approximately 9,600 workers will retire between 2022 and 2027, and another 7,300 will retire between 2028 and 2032, leading to a significant loss of experienced and skilled workers.[24] If this trend continues, the industry may face an increased shortage of skilled labour in the future.

》》》 **Competition for skilled workers:** In the first half of 2024, the job market stabilised following the disruptions caused by the COVID-19 pandemic but remains highly competitive.[25] Employers face significant challenges in attracting and retaining skilled workers, especially in areas where other industries offer better wages and conditions.

》》》 **Ability to attract, train, and retain younger generations:** Challenges related to attracting, training, and retaining younger generations can be multifaceted, involving industry perception, the level of investment in and access to training and development, career prospects and workforce turnover.

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

[23] Australian Fashion Council 2022, Fashion Evolution: From Farm to Industry, viewed 13 June 2024, <https://ausfashioncouncil.com/wp-content/uploads/2022/06/2022-Industry-Modelling-Report.pdf>.

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

[25] Jobs and Skills Australia 2024, Internet Vacancy Index, <https://www.jobsandskills.gov.au/data/internet-vacancy-index>.

Access to Training

There are inconsistencies in the availability and geographical distribution of RTOs offering various skill levels for specialised industry areas.

Foundational skills training: Nineteen RTOs provide foundational skills through the Certificate II in Apparel, Fashion, and Textiles, with a broad geographical distribution, ensuring access across most states.

Specialised skills training: Access to specialised and technical skills training, such as Certificates III and IV, is more limited. Fewer RTOs offer these qualifications, particularly in specialised areas like millinery, leather manufacturing, and footwear manufacturing.

Higher-level qualifications: Diplomas and Advanced Diplomas are offered by eleven RTOs, predominantly TAFE organisations with a broader geographic reach. These programs support the demand for highly skilled textile and clothing professionals in the industry.

Tertiary education programs: Eight universities offer a range of undergraduate programs for careers in fashion design. These programs are available in major Australian cities, including Perth, Adelaide, Sydney, Melbourne, Brisbane, and Canberra.

Geographic Gaps

States and territories with a lower industry presence, such as Tasmania, South Australia, the Australian Capital Territory, and the Northern Territory, face significant challenges due to the absence or very limited number of RTOs across all qualification levels.

Current and Future Skill Needs

Technical skill needs

To estimate the number of people needing specialised, technical training to meet future demand in the TCF industry, it is necessary to consider projected employment growth[26] and retirements[27].

According to these estimates, by 2033, it is projected that at least 18,400 individuals will require specialised technical training in TCF job functions to meet workforce demands. Approximately half of these individuals will be needed within the TCF industry, while the other half will be required in various other industries, such as medical and aged care.

This training may encompass industry-specific qualifications and technical skill needs include machinists, technicians, and sewing and pattern making.

Skill gaps and emerging skill needs

A review of TCF industry studies and reports[28] indicates that key trends influencing the TCF industry's workforce, which can inform strategies for adaptive workforce development and training, include:

Circular Economy
Technology
Ethical Practices
Customisation & Personalisation

Skill Needs – Circular Economy

- **Sustainable practices**: Skills and knowledge in applying sustainable practices across the textile life cycles, including material sourcing and waste reduction in the design phase.

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[26] Jobs and Skills Australia 2023, *Employment Projections*, viewed 18 June 2024, <https://www.jobsandskills.gov.au/data/employment-projections>.

[27] Retirement projections for specialised occupations (combined TCF and non-TCF workforce) have been based on Census 2021.

[28] BlockTexx 2024, *BlockTexx - Textile recovery technology*, viewed 25 June 2024, <https://www.blocktexx.com/>.

Boulton, J, McCallion, A & Dechrai, I 2022, *Textiles: A Transitions Report for Australia Identifying Pathways to Future Proof the Australian Fashion and Textile Industry.*, Monash University, viewed 25 June 2024, <https://www.monash.edu/__data/assets/pdf_file/0006/3059394/MSDI_Circular_Economy_Textiles_Transitions_Report.pdf>.

McKinsey & Company 2023, *The State of Fashion 2024*, www.mckinsey.com, viewed 13 June 2024, <https://www.mckinsey.com/industries/retail/our-insights/state-of-fashion#/>.

Ethical Clothing Australia 2024, *Ethical Clothing Australia*, viewed 25 June 2024, <https://ethicalclothingaustralia.org.au/>.

- **Broader sustainability knowledge**: Understanding of sustainability practices linked to textile production and consumption, including an understanding of planetary boundaries and resource use.
- **Alternative business models**: Familiarity with alternative business models, including those within the circular, sufficiency and well-being economy.
- **Entrepreneurship and innovation**: Skills in design thinking, problem-solving, and product development to transform ideas into reality.
- **Supply chain management**: Skills in logistics, procurement, and inventory management.

Skill Needs – Technology

- **Advanced materials and technology:** Skills in using advanced materials, laser cutting, new digital tools and platforms, and generative AI.
- Specific industry examples include:
    - **Leather manufacturing:** Skills in laser cutting technology.
    - **Millinery:** Skills in working with advanced materials like thermoplastics, digital printing and laser cutting contemporary materials.
    - **Textile:** Skills in using digital tools and platforms for designing and producing specialised textiles, including CAD, data analysis, and programming.

Skill Needs – Customisation & Personalisation

- **Bespoke production techniques:** Expertise in bespoke production techniques and customer interaction to meet the growing demand for customised and personalised products.

Skill Needs – Ethical Practices

- **Leadership and management**: Skills to support ethical practices, diversity and wellbeing in the workplace, innovation, and creativity.
- **Strategic and operational planning**: Skills in business planning, workforce planning, human resource management, coaching and mentoring

Review and Updates to MST Training Package (2019-2022)

Between 2019 and 2022, the MST training package underwent significant restructuring and streamlining. This involved updating, consolidating, and, where necessary, deleting qualifications and units of competency to better align with industry needs. New skill sets were also created. The changes aimed to enhance job readiness, address skill gaps, and support industry compliance with standards and technological advancements.

The qualifications for leather, footwear and millinery production sectors have not been updated since 2016.

Qualification Updates

2019   MST20419 Certificate II in Laundry Operations

            MST30619 Certificate III in Laundry Operations

            MST30919 Certificate III in Dry Cleaning Operations

Updates: Units were revised to support industry needs such as compliance with Australian/New Zealand standards, infection control, automation, and safety. New units on RFID technology and laundry finishing operations were introduced.

Intended Outcome: These changes aimed to improve industry compliance, enhance safety, and provide flexible upskilling opportunities for workers, particularly those from culturally diverse backgrounds.

2020   MST30220 Certificate III in Manufactured Textile Products

Updates: Minor updates were made, including revisions to units for industrial sewing operations.

Intended Outcome: The updates aimed to keep the qualification relevant to current industrial practices.

2020   MST40122 Certificate IV in Textile Design and Technology

            MST40222 Certificate IV in Apparel and Fashion

            MST50122 Diploma of Apparel Fashion and Textiles

            MST60122 Advanced Diploma of Apparel Fashion and Textiles

Updates: Four qualifications were updated by merging seven existing qualifications, resulting in substantial improvements. These updates include broadening workplace outcomes beyond fashion, removing prerequisites, reducing the number of units and simplifying performance criteria. Additionally, new units were added to enable skills in various areas: sourcing, costing, innovation and digital design at the Diploma level and technical drawing, industry-specific sustainability, and quality at the Certificate IV level. The Diplomas were further strengthened to support competencies in buying both product ranges and materials/accessories for production across various market segments.

Intended Outcome: The updates aimed to strengthen references to technologies, sustainability, and circular economy practices within the TCF industries, while broadening the scope of training beyond fashion design to include a wider range of textile products. Graduates are now expected to be better equipped to meet employer expectations and improve their job readiness.

New Skill Sets

2019	MSTSS00001 Textiles Clothing and Footwear Buying Skill Set
	MSTSS00002 Textiles Clothing and Footwear Sourcing for Production Skill Set
	MSTSS00003 Introduction to Laundry Operations Skill Set
	MSTSS00004 Introduction to Laundry or Dry Cleaning Industry Skill Set
	MSTSS00005 Control Hygiene in Laundry Operations Skill Set
	MSTSS00006 Sustainable Practices in Laundry Operations Skill Set
	MSTSS00007 Sustainable Practices in Dry Cleaning Operations Skill Set
	MSTSS00008 Use Technology in TCF Operations Skill Set
	MSTSS00009 Dispose of Waste Products in TCF Operations
	MSTSS00010 Supervise Work TCF Operations Skill Set
	MSTSS00011 Ironer Safety Skill Set
	MSTSS00012 Spotting Skill Set
	MSTSS00013 Customer service in Laundry or Dry Cleaning Operations Skill Set
	MSTSS00014 Manage Technology in TCF Operations Skill Set

Rationale: Created to meet industry demand for more targeted training options.

Intended Outcome: These skill sets provide flexible training options that support upskilling and reskilling. They also provide a shorter, targeted training option and recognition of skills acquisition, facilitating easier access to specific qualifications.

2020   MSTSS00015 Industrial Sewing Skill Set

Rationale: Developed in response to changes in the sewing production market, such as increased offshoring, an ageing workforce, and the need for entry-level skills.

Intended Outcome: This skill set provides a shorter, targeted training option for entry-level skills, promoting cross-industry transferability, upskilling/reskilling of the existing workforce, and supporting the niche market for quality Australian-made products.

Training and Employment Pathways

Key:
- (blue box) Suitable for delivery in schools in various states
- **BOLD FONT** Approved for delivery as apprenticeship in various states

AQF Level 6
- Advanced Diploma of Apparel, Fashion and Textiles

AQF Level 5
- Diploma of Apparel, Fashion and Textiles

AQF Level 4
- Certificate IV in Textile Design and Technology
- Certificate IV in Apparel and Fashion
- Certificate IV in Millinery
- Certificate IV in Custom-Made Footwear

AQF Level 3
- **Certificate III in Manufactured Textile Products**
- Certificate III in Apparel, Fashion and Textiles
- Certificate III in Millinery
- **Certificate III in Footwear**
- Certificate III in Dry Cleaning Operations
- Certificate III in Laundry Operations
- **Certificate III in Leather Production**

AQF Level 2
- Certificate II in Apparel, Fashion and Textiles
- Certificate II in Laundry Operations
- Certificate II in Leather Production

Skill Sets
- 2 skill sets for buying & sourcing roles
- 5 skill sets for clothing & footwear roles
- 6 skill sets for dry cleaning roles
- 8 skill sets for laundry roles
- 2 skill sets for entry into a laundry and/or dry-cleaning roles

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Career pathways in the TCF industry

Occupations and specialisations in the TCF industry

AQF Level	Textile Manufacturing		Apparel Manufacturing	Leather Manufacturing	Footwear Manufacturing	Laundry and Dry Cleaning
AQF Level 2	Production Assistant		Production Assistant	Production Assistant	Production Assistant	Laundry Operator: • Folding Machine Operator • Linen Sorter Ironer or Presser Hospital Laundry Laundry Supervisor Dry Cleaner Dry Cleaning Leading Hand
AQF Level 3	Machine/Production Operator: *Yarn* • Cotton Ginner • Bill Box Operator • Yarn Comber • Yarn Texture Operator • Feltmaker *Woven* • Beamer • Loom Operator • Carpet Weaver • Warper • Tufting Machine Operator • Other Machine Operator	*Non-woven (Technical)* • Production Operator *Dyeing & Finishing* • Textile Dyer • Textile Finisher *Rope, Cordage & Twine* • Net Roper • Rope Making Machinist *Printing* • Digital Services • Fashion Digital Print Assistant	Machine/Production Operator: • Sewing Machinist • Embroidery Machinist *Knitting* • Flat Bed Knitter • Warp Knitter Milliner Assistant Fabric Agents (source fabric)	Machine/Production Operator: • Fellmongering Machine Operator • Hide and Skin Fleshing Machine Operator • Sammying Machine Operator • Tanner • Leather Goods Machinist	Machine/Production Operator: • Footwear Cutter • Footwear Finisher • Footwear Stitcher • Footwear Assembler	
AQF Level 4	Canvas Goods Fabricator Sail Maker Textile Cutter Leading Hand		Apparel Cutter Tailor / Dress Maker / Costume Maker Pattern Marker / Grader (Clothing) Sample Garment Maker / Sample Machinist Milliner / Milliner Technician Leading Hand	Leather Goods Grader Saddler Whip Maker Leading Hand	Custom-made Footwear Maker Medical Grade Footwear Maker Pattern Maker & Grader (Footwear) Footwear Repairer Leading Hand	
AQF Level 5	Textile Technologist		Trend Forecaster		Footwear Technologist	

AQF Level 6	Textile Designer Production Manager	Fashion Designer Production Manager	Leather Goods Designer Production Manager	Footwear Designer Production Manager	Operations Manager

TCF Industry Mapped to the ANZSIC and ANZSCO Classification

TCF sectors mapped to the ANZSIC classification

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

	1334 Textile Finishing and Other Textile Product Manufacturing	• Badge, woven, manufacturing • Binding, textile, manufacturing • Embroidered apparel manufacturing • Embroidered fabric manufacturing • Felt manufacturing • Label, printed cloth, manufacturing	• Label, woven cloth, manufacturing • Textile dyeing • Textile fabric coating • Textile printing (except screen printing) • Textile product manufacturing n.e.c. • Underfelt manufacturing
	1331 Textile Floor Covering Manufacturing	• Carpet manufacturing • Carpet tile manufacturing • Floor rug, textile, manufacturing	• Hard fibre floor covering manufacturing (including sisal, coir and grass mat manufacturing) • Jute matting manufacturing
	1332 Rope, Cordage and Twine Manufacturing	• Cable manufacturing (from natural or synthetic fibres) • Cord manufacturing (except wire rope or tyre cord) • Cordage manufacturing • Fish net manufacturing • Net manufacturing n.e.c.	• Netting, textile, manufacturing • Rope manufacturing (except wire rope) • String manufacturing • Twine manufacturing
Apparel Manufacturing	Fashion and textile design is a subcategory of 6924 Other Specialised Design Services		
	1351 Clothing Manufacturing	• Belt manufacturing (for clothing) • Clothing accessory manufacturing n.e.c. • Clothing manufacturing n.e.c. • Clothing, fur, manufacturing • Clothing, knitted fabric, manufacturing • Clothing, leather, manufacturing • Clothing, plastic or rubber, manufacturing • Glove manufacturing (except rubber) • Handkerchief manufacturing • Hat and cap manufacturing • Headwear manufacturing • Helmet, fabric or leather, manufacturing • Infants' clothing manufacturing	• Jeans manufacturing • Laces manufacturing • Men's and boys' wear manufacturing • Outerwear manufacturing • Sleepwear manufacturing • Swimwear manufacturing • Tie manufacturing • Underwear manufacturing • Uniform manufacturing • Waterproof clothing manufacturing • Wetsuit manufacturing • Women's and girls' wear manufacturing • Workwear manufacturing
	1340 Knitted Product Manufacturing	• Clothing, knitted, manufacturing • Crocheted fabric manufacturing • Custom knitting of pullovers or cardigans • Hosiery manufacturing • Jacket, knitted, manufacturing • Jersey, knitted, manufacturing	• Knitted fabric manufacturing • Panty hose manufacturing • Sock manufacturing • Stocking manufacturing • Tights manufacturing
	1320 Leather Tanning, Fur Dressing and Leather Product Manufacturing	• Bag, leather or leather substitute, manufacturing • Bleaching and currying fur • Currying hides • Embossing hides and skins • Fellmongery operation • Finishing hides and skins • Fur rug manufacturing	• Leather packing, industrial, manufacturing • Machine belting, leather or leather substitute, manufacturing • Pelt finishing and tanning • Pulling sheep and lamb skin • Saddle manufacturing • Scraping fur and pelt

		Fur skin dressing or dyeing • Handbag manufacturing (including metal mesh handbags) • Harness manufacturing • Japanning hides and skins • Leather or leather substitute goods manufacturing	• Seat cover, sheepskin, manufacturing • Slipe wool manufacturing • Suitcase manufacturing (including canvas) • Tanning hides and skins • Toy, leather, manufacturing • Wallet manufacturing (including metal mesh wallets)
Footwear Manufacturing	1352 Footwear Manufacturing	• Boot manufacturing • Footwear component manufacturing • Footwear manufacturing (including safety or protective footwear) • Orthopaedic shoe manufacturing (excluding orthopaedic extension footwear)	• Sandal manufacturing • Shoe manufacturing • Slipper manufacturing
Laundry and Dry Cleaning	9531 Laundry and Dry-Cleaning Services	• Automatic laundry operation (coin-operated) • Baby napkin hire service • Carpet, upholstery and rug cleaning • Clothing, hat or garment (including leather), cleaning service • Curtain and drapery cleaning service • Dry-cleaning agency operation • Dry-cleaning service	• Laundry agency operation • Laundry and dry-cleaning service • Laundry operation • Linen hire service • Self-service laundry operation • Uniform hire service
Clothing and Footwear Repair	Class 9491 Clothing and Footwear Repair	• Clothing repair • Footwear (including boot and shoe) repair	

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

TCF occupations mapped to the ANZSCO classification

ANZSCO 4-digit Code and Title	ANZSCO 6-digit Code and Title	Industry Sector	Occupation / Job Title	Skill Level
2323 Fashion, Industrial and Jewellery Designers	232311 Fashion Designer	Apparel Manufacturing	Fashion Designer	Bachelor's degree or higher education.
	232312 Industrial Designer	Leather Manufacturing	Leather Goods Designer	
		Textile Manufacturing	Textile Designer	
3931 Canvas and Leather Goods Makers	393111 Canvas Goods Fabricator	Textile Manufacturing	Canvas Goods fabricator	Certificate IV or III (including at least 2 years of on-the-job training.
	393112 Leather Goods Maker	Leather Manufacturing	Leather Goods Grader	
			Leather Goods Leading Hand	
			Saddler	

			Leather Goods Machinist	
			Whip Maker	
	393113 Sail Maker	Textile Manufacturing	Sail Maker	
	393114 Shoemaker	Footwear Manufacturing	Custom-made Footwear Maker	
			Medical Grade Shoemaker	
			Shoe Repairer	
	393211 Apparel Cutter	Apparel Manufacturing	Apparel Cutter	
	393212 Clothing Patternmaker		Pattern Grader (Clothing)	
			Pattern Maker and Grader	
	393213 Dressmaker or Tailor		Tailor (Costume Maker)	
			Tailor (Wardrobe Assistant)	
			Tailor (Wardrobe Coordinator)	
	393299 Clothing Trades Workers nec		Milliner	
			Milliner Technician	
7117 Textile and Footwear Production Machine Operators	711711 Footwear Production Machine Operator	Footwear Manufacturing	Shoemaking Cutter	Certificate II or III
			Shoemaking Finisher	
	711712 Hide and Skin Processing Machine Operator	Leather Manufacturing	Fellmongering Machine Operator	
			Hide and Skin Fleshing Machine Operator	
			Hide and Skin Processing Machine Operator	
			Sammying Machine Operator	
			Tanner	
	711713 Knitting Machine Operator	Apparel Manufacturing	Flat Bed Knitter	
			Warp Knitter	
	711714 Textile Dyeing and Finishing Machine Operator	Textile Manufacturing	Textile Dyer	
			Textile Finisher	
	711715 Weaving Machine Operator /loom operator		Beamer	
			Carpet Weaver	
			Loom Operator	
			Warper	
			Waving Machine Operator	
	711716 Yarn Carding and Spinning Machine Operator		Cotton Ginner	
			Gill Box Operator	
			Yarn Comber	

	711799 Textile and Footwear Production Machine Operators nec		Yarn Texture Machine Operator	
			Feltmaker	
			Net Maker	
			Rope Making Machine Operator	
			Tufting Machine Operator	
			Textile Cutter	
7116 Sewing Machinists	711611 Sewing Mahinist	Apparel Manufacturing	Sewing Machinist	Certificate II or III
			Embroidery Machinist	
8115 Laundry Workers	811511 Laundry Worker (General)	Laundry and Dry Cleaning	Laundry Operator - Folding Machine Operator	Certificate I or secondary education.
			Laundry Operator - Linen Sorter	
	811512 Drycleaner		Dry Cleaner	
	811513 Ironer or Presser		Ironer or Presser	

Source: Australian Bureau of Statistics, ANZSCO - Australian and New Zealand Standard Classification of Occupations, 2022

TCF occupations not represented in the ANZSCO classification

Industry Sector	Occupation
Apparel Manufacturing	Fabric Agents (source fabric)
	Sample Garment Maker / Sample Machinist
	Trend Forecaster
Footwear Manufacturing	Footwear Technologist
Textile Manufacturing	Digital Services
	Fashion Digital Print Assistant
	Textile Technologist