

# EuroBoosTEX

EuroBoosTEX Joint European initiative in Textile Industry for Europe's recovery  
boosting digital and green transition



Mapping International Opportunities

**AUSTRALIA**

Market Assessment Report  
Summary



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# Australia overview



Australia is the largest country by area in Oceania and the sixth largest country in the world.

Australia has 2 territories: Northern Territory and Australian Capital Territory and 6 states: New South Wales, Victoria, Queensland, South Australia, Western Australia, and Tasmania.

The capital city of Australia is Canberra.

<https://www.dfat.gov.au/sites/default/files/australia-in-brief-2021.pdf>

# Australia overview

<b>Population</b>	<p>26.481.459</p> <p>Around 29% of people in Australia were born overseas, and nearly half Australians say that least one parent was born overseas</p> <p><small><a href="https://www.globalaustralia.gov.au/sites/default/files/2023-08/ATIC_Benchmark%20Report_2023.pdf">Australia Population (2023) - Worldometer (worldometers.info)</a> <a href="https://www.globalaustralia.gov.au/sites/default/files/2023-08/ATIC_Benchmark%20Report_2023.pdf">https://www.globalaustralia.gov.au/sites/default/files/2023-08/ATIC_Benchmark%20Report_2023.pdf</a></small></p>
<b>Religion</b>	<p>In 2021, the most common religions were Christianity (43,9%), No religion (38,9%), Islam (3,2%), Hinduism (2,7%) and Buddhism (2,4%)</p> <p><small><a href="https://www.abs.gov.au/articles/religious-affiliation-australia">https://www.abs.gov.au/articles/religious-affiliation-australia</a></small></p>
<b>Official language</b>	<p>Does not have an official language, but English plays de role of the main language used for education, commerce, science, etc.</p> <p><small><a href="https://www.migrationtranslators.com.au/is-there-an-official-language-in-australia/">https://www.migrationtranslators.com.au/is-there-an-official-language-in-australia/</a></small></p>
<b>Currency</b>	<p>Australian Dollar (AUD)</p>

# Australia economic overview

- Australia was positioned as the world's 12th largest economy in 2021.
- Australia is home to just 0,3% of the world's population, but accounts for 1,7% of the global economy.
- 97,3% of all Australian businesses were small businesses (with less than 20 employees), in June 2023.
- Trade represents around 45% of Australia's economy. Australia partners in the Asia region accounted for almost 75% of our total goods and services trade in 2021–22, and China remained Australia's largest trading partner.
- The EU and the UK accounted for 11% of total trade in 2021–22, and the US for 7%.

[https://www.globalaustralia.gov.au/sites/default/files/2023-08/ATIC\\_Benchmark%20Report\\_2023.pdf](https://www.globalaustralia.gov.au/sites/default/files/2023-08/ATIC_Benchmark%20Report_2023.pdf)  
<https://www.asbfeo.gov.au/small-business-data-portal/number-small-businesses-australia>



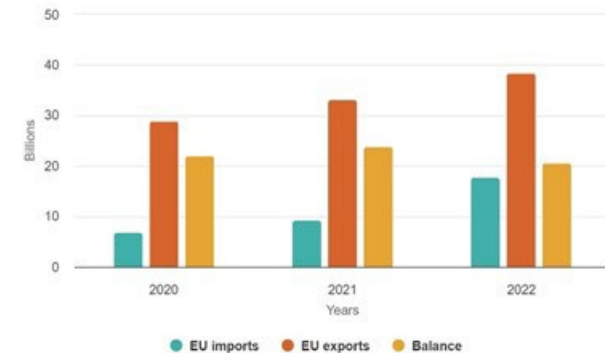
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# Australia economic overview

- Australia has 17 Free Trade Agreements (FTAs), including agreements with the United States, China, Korea, Japan and Singapore. Australia is also a member of regional multi-party trade agreements, including the Regional Comprehensive Economic Partnership Agreement (RCEP) and the ASEAN-Australia-New Zealand Free Trade Agreement (AANZFTA). During 2022, the Australia-India Economic Cooperation and Trade Agreement (ECTA) came into force.
- On June 2018, Australia and the European Union (EU) started the negotiations for a free trade agreement (FTA). This aims to facilitate trade in industrial products between the EU and Australia by reducing technical barriers and improve trade in services and investment.
- In 2022, Australia ranked as the EU's 18<sup>th</sup> biggest partner for trade in goods, while the EU was Australia's 3<sup>rd</sup> largest trading partner after China and Japan (but before the United States).



[https://www.globalaustralia.gov.au/sites/default/files/2023-08/ATIC\\_Benchmark%20Report\\_2023.pdf](https://www.globalaustralia.gov.au/sites/default/files/2023-08/ATIC_Benchmark%20Report_2023.pdf)  
[https://www.eeas.europa.eu/sites/default/files/partnership\\_framework2009eu\\_en.pdf](https://www.eeas.europa.eu/sites/default/files/partnership_framework2009eu_en.pdf)  
[https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/australia\\_en](https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/australia_en)

# Australia textile market outlook

- The fashion and textile industry contribute to over \$27.2 billion to Australia's economy, and employ more than 489.000 Australians.
- The Australian fashion and textile industry is particularly focused at the design and retail ends of the production chain - 88% of business design their products in Australia, but only 29% source some of their materials from local suppliers.
- In 2021, the major trading partner for Australia in textiles and clothing were China, Vietnam, Indonesia, New Zealand and India, for exports, and China, Bangladesh, India, Vietnam and Indonesia, for imports.
- Spain, Portugal, Italy, France, Czech Republic, Germany, Netherlands, Belgium, Bulgaria, Romania and Lithuania are in the 45 first countries, in terms of Australia imports and/or exports of textiles and clothing products, being Italy in 6<sup>th</sup> and 7<sup>th</sup> position in terms of exports and imports, respectively.
- Australia is a major supplier of merino wool and a significant supplier of quality cotton, being the third largest exporter country in the world.

<https://ausfashioncouncil.com/wp-content/uploads/2022/06/2022-Industry-Modelling-Report.pdf>

[https://wits.worldbank.org/CountryProfile/en/Country/AUS/Year/2021/TradeFlow/EXPIMP/Partner/by-country/Product/50-63\\_TextCloth](https://wits.worldbank.org/CountryProfile/en/Country/AUS/Year/2021/TradeFlow/EXPIMP/Partner/by-country/Product/50-63_TextCloth)

[https://www.monash.edu/\\_data/assets/pdf\\_file/0006/3059394/MSDI\\_Circular\\_Economy\\_Textiles\\_Transitions\\_Report.pdf](https://www.monash.edu/_data/assets/pdf_file/0006/3059394/MSDI_Circular_Economy_Textiles_Transitions_Report.pdf)



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# Australia textile market outlook

In 2022, Australia export and import of textile articles, represented only 1,5% (in exports) and 4,1% (in imports) of total goods.

Australia exports mainly fibres and imports final products.

The Australia exports of wool (Code 51: Wool, fine or coarse animal hair), and cotton (Code 52: Cotton) represent 88,9% of the total textile articles exported.

Australia imports of clothing articles and other made-up textile articles (Code 61: Articles of apparel and clothing accessories, knitted or crocheted, Code 62: Articles of apparel and clothing accessories, not knitted or crocheted and Code 63: Other made-up textile articles; sets; worn clothing and worn textile articles; rags), represent 86,5% of the total textile articles imported.

<https://www.trademap.org/Index.aspx>



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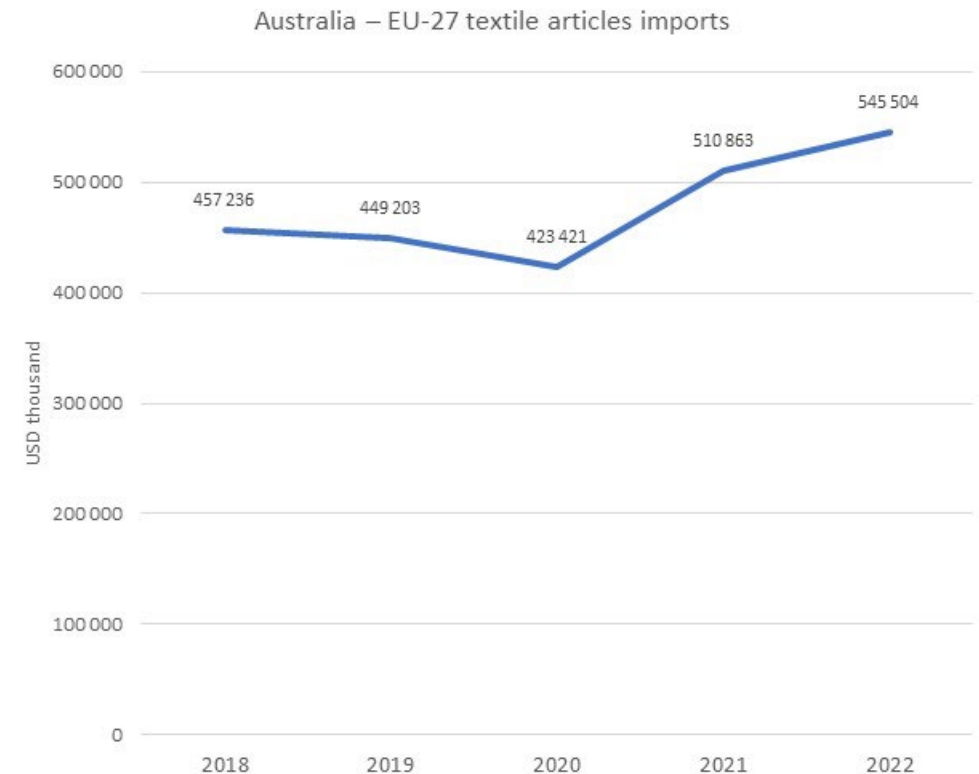
Goods	Export (USD thousand)	Import (USD thousand)
All products	402.166.083	290.113.710
Total textiles articles	6.174.031	12.019.292
Code 50: Silk	404	4.727
Code 51: Wool, fine or coarse animal hair; horsehair yarn and woven fabric	2.403.621	53.969
Code 52: Cotton	3.086.297	72.474
Code 53: Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn	1.333	26.689
Code 54: Man-made filaments; strip and the like of man-made textile materials	17.907	292.202
Code 55: Man-made staple fibres	9.087	111.713
Code 56: Wadding, felt and nonwovens; special yarns; twine, cordage, ropes and cables and articles thereof	45.128	273.671
Code 57: Carpets and other textile floor coverings	31.014	430.238
Code 58: Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery	5.033	44.849
Code 59 Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable...	38.735	237.232
Code 60: Knitted or crocheted fabrics	5.594	78.962
Code 61: Articles of apparel and clothing accessories, knitted or crocheted	177.206	4.218.161
Code 62: Articles of apparel and clothing accessories, not knitted or crocheted	204.750	4.039.360
Code 63: Other made-up textile articles; sets; worn clothing and worn textile articles; rags	147.922	2.135.045

# Australia textile market outlook

Australia imports of textile articles from EU-27 countries decreased from 2018 to 2020, probably due to the COVID19 pandemic. But in the following years the imports increased to values superior to 2018.

The main type of textile products that Australia imports from EU-27 countries are articles of apparel and clothing accessories, not knitted or crocheted (code 62), representing more than 33% of the total textile articles, followed by the articles of apparel and clothing accessories, knitted or crocheted (code 61), representing around 18% to 20% of the total textile articles. The carpets and other textile floor coverings (code 57) and impregnated, coated, covered or laminated textile fabrics (Code 59) have also some expression on the total textile articles imported by Australia.

<https://www.trademap.org/Index.aspx>





# Australia textile market outlook

Australia exports of textile articles to EU-27 countries also decreased from 2018 to 2020, probably for the same reason (COVID 19 pandemic), but more significantly than happen in the imports. In the following years, the exports increased, but not achieving the values of 2018.

The main type of product that Australia exports to EU-27 countries is wool, fine or coarse animal hair, horsehair yarn and woven fabric (code 51), representing around 83% to 94% of the total textile articles, from 2018 to 2022.

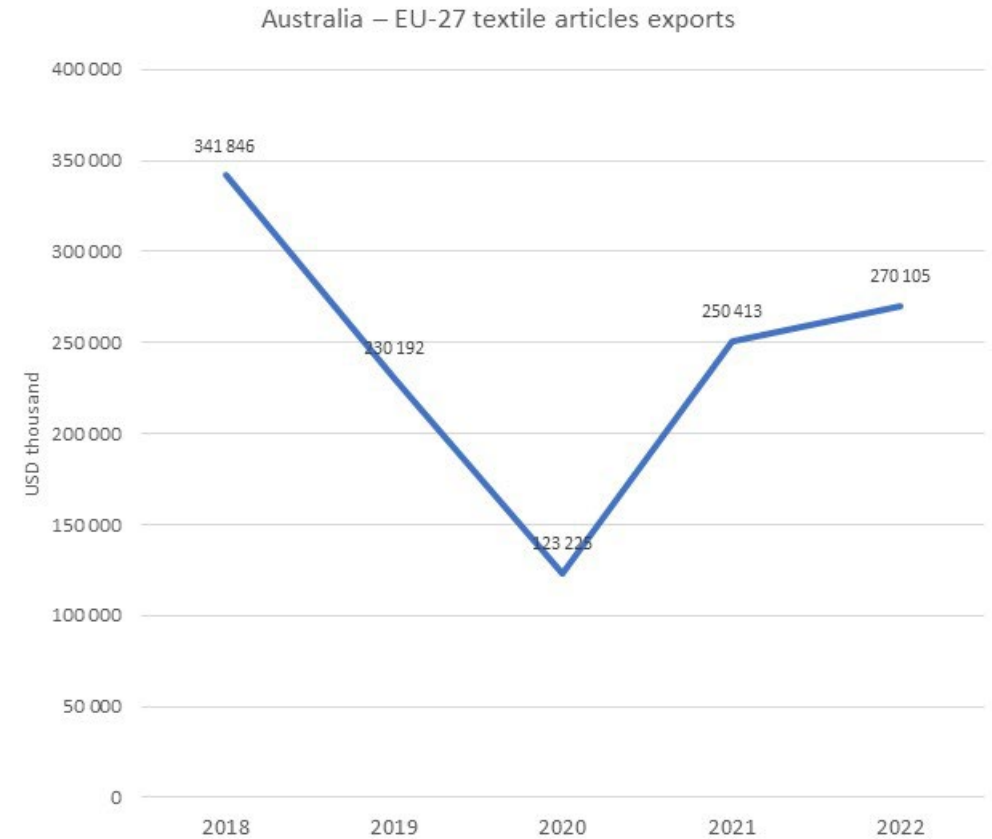
<https://www.trademap.org/Index.aspx>



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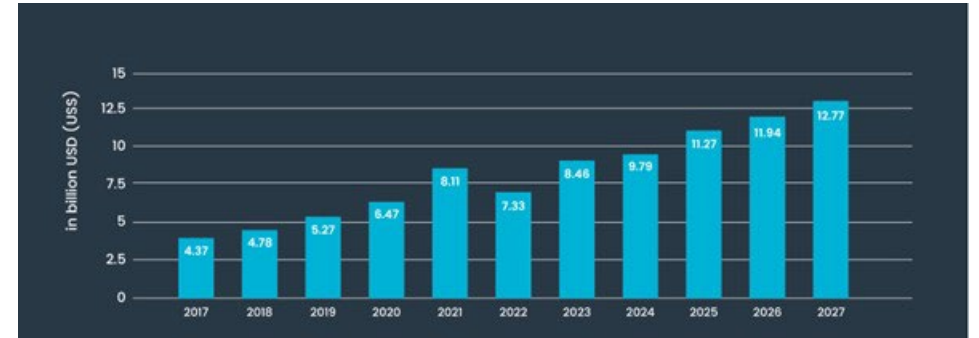
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# Australia textile application - Fashion

Australia is the second largest consumer of textiles in the world, after the United States of America, with a per capita consumption of 27kg per year.

The Australian fashion industry expects growth. The revenue in the fashion market is projected to reach US\$12,77 bn in 2027.



In the clothing segment of fashion, womenswear is by far the largest segment, when compared menswear and childrenswear, in terms of revenue, but it is more difficult to compete for market share.

Sustainability in fashion is considered important by the Australian, even though the price is still the most relevant factor.

Australian customers are expected to spend \$43,20 billion buying products online, with fashion contributing with the largest amount at \$16,98 billion.

[https://blog.commissionfactory.com/ecommerce-marketing/fashion-and-apparel-statistics-in-australia-2024-commission-factory#Statistics\\_and\\_Market](https://blog.commissionfactory.com/ecommerce-marketing/fashion-and-apparel-statistics-in-australia-2024-commission-factory#Statistics_and_Market)  
<https://www.globaldata.com/store/report/australia-apparel-market-trend-analysis/>

# Australia textile application - Home and hospitality

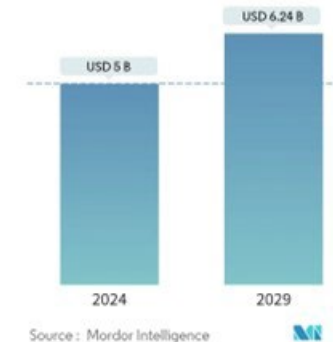
Australia home textiles market size is estimated at USD 5 billion in 2024 and is expected to reach USD 6,24 billion by 2029.

The online home textile market of Australia is growing, with more companies selling home textiles online, including retailers with physical stores.

Other trend in the home textile market is the demand for linen products, as it is considered more sustainable and biodegradable

The hotel textile segment is expected to grow due to the increasing demand for quality accommodation and the growing tourism industry worldwide.

**Australia Home Textiles Market**  
Market Size in USD Billion  
CAGR 4.56%



Study Period	2020 - 2029
Base Year For Estimation	2023
Market Size (2024)	USD 5.00 Billion
Market Size (2029)	USD 6.24 Billion
CAGR (2024 - 2029)	4.56 %
Market Concentration	Medium



<https://www.mordorintelligence.com/industry-reports/australia-home-textiles-market>

26) Hotel Textile Market Size 2023 - 2030 Global Industrial Analysis, Key Geographical Regions, Market Share, Top Key Players, Product Types and Forecast | LinkedIn

# Australia textile application – Athleisure and sportswear

The increasing number of people doing sports, the ageing population, the athleisure phenomenon have increase the demand for sport and activewear.

In the sports market, the sports clothing represents 55,1% in terms of revenue.

Over the past five years, the fitness and athletic clothing market in Australia revenue have grown being estimated to reach \$3,7bn in 2024.

The total number of sportswear companies in Australia is 18.168. New South Wales has 26% of the sportswear companies , followed by Victoria with 22% and Queensland 20%.



<https://www.ibisworld.com/au/industry/fitness-athletic-clothing-stores/5181/#IndustryStatisticsAndTrends>  
<https://bolddata.nl/en/companies/australia/sportswear-companies/>



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# Australia textile application – Workwear and PPE

Australia has stringent regulations and standards for personal protective equipment (PPE), which depends on the industry and the level of risk involved in specific work environments. The textile workwear and PPE needs in Australia covers different activities:

- Construction and building: high-visibility apparel, cloths protecting from extreme weather conditions and durable protective clothing.
- Healthcare and medical facilities: Scrubs, pants, jacket and lab coats, mask, and other garments used to maintain hygiene, prevent contamination, and protect against biological hazards.
- Hospitality and food services: aprons, chef coats, and headgear to protect against spills, burns, and other workplace hazards.
- Manufacturing industry: protective clothing, masks and gloves, to protect from chemicals, biological and mechanical hazards.
- Mining and resources industry: protective clothing, high-visibility gear, safety harnesses, and respiratory protection.
- Agriculture and farming industry: coveralls, gloves, hats and other garments to protect against various hazards, such as sharp objects, chemicals, extreme weather, and animal-related risks.

<https://homebosses.home.blog/2023/05/22/a-comprehensive-guide-to-workwear-safety-style-and-where-to-find-the-best-in-australia/>



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# Australia textile application – Geotextiles

Australia imports most of its geotextiles from India, Vietnam and China, and is the 3rd largest importer of geotextile in the World, in terms of shipments.

The top three product categories of geotextile imported to Australia are :

- HSN Code 5311 0015 (Woven fabrics of other vegetable textile fibres; woven fabrics of paper yarn/ coir including log form and geotextiles).
- HSN Code 5603 9400 (Nonwovens, whether or not impregnated, coated, covered or laminated/ Weighing more than 150 g/m2).
- HSN Code 5311 0019 (Woven fabrics of other vegetable textile fibres; woven fabrics of paper yarn/ others).



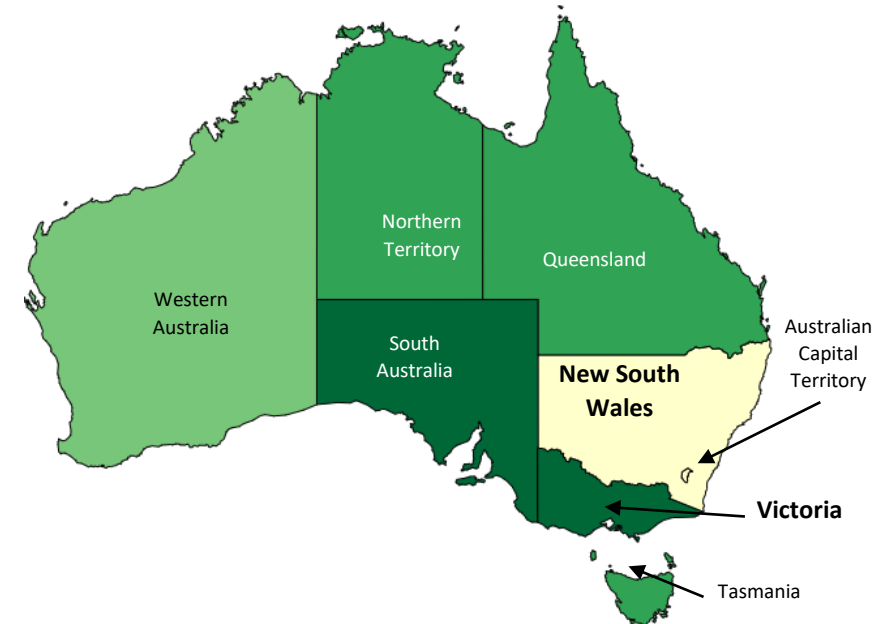
<https://www.grandviewresearch.com/industry-analysis/geotextiles-industry>  
<https://www.volza.com/p/geotextile/import/import-in-australia/>

# Australia textile market in territories/ states

The textiles and clothing sector major hubs are located in New South Wales and Victoria.

In terms of wool production, New South Wales produces the greatest volume of wool, followed by Victoria, Western Australia and South Australia.

Nevertheless, Victoria has the largest share of textile processing and manufacturing workforce and is Australia's largest wool exporter accounting for 51% of the nation's wool exports.



[https://ibsa.org.au/wp-content/uploads/2018/04/MST-2018-Skills-Forecast\\_draft-public.pdf](https://ibsa.org.au/wp-content/uploads/2018/04/MST-2018-Skills-Forecast_draft-public.pdf)  
<https://www.agriculture.gov.au/agriculture-land/farm-food-drought/meat-wool-dairy/wool>  
<https://www.aapathways.com.au/industries/textiles>

Australia market assessment report

# Australia textile trade fairs

## **Global Sourcing Expo Australia**

Happens twice a year with expos in both Sydney (the capital of New South Wales) and Melbourne (the capital of Victoria). The next edition will be from 12 to 14 June 2024, in Sydney (<https://globalsourcingexpo.com.au/>)

## **Australian Manufacturing Week**

Happens once a year and take place in Sydney or Melbourne. Nex edition will be from 17 to 19 April 2024, in Sidney (<https://australianmanufacturingweek.com.au/>)

## **Australasian Quilt Convention**

Happens once a year and take place in Melbourne. Next edition will be from 11 to 14 April 2024 (<https://aqc.com.au/>)

## **SpecTex**

Happens once a year, in Queensland. Next edition will be from 1 to 4 June 2024, in Brisbane Convention & Exhibition Centre (<https://www.specialisedtextiles.com.au/>)

## **AFAC Conference & Exhibition**

Happens once a year and take place in Sidney. Next edition will be from 3 to 6 September 2024 (<https://www.afaconference.com.au/the-exhibition>)

## **SUPER EXPO**

It takes place every three years at the Gold Coast Convention & Exhibition Center in Queensland. Next edition is scheduled to 2026, between June 10 and 12 (<https://www.specialisedtextiles.com.au/news-item/9517/superexpo2023-launches-member-registrations>)



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# Conclusions

The textiles and clothing industry operates across urban and regional areas of Australia with major hubs located in New South Wales and Victoria. So, an Australia business mission in the textile and clothing sector preferably would be focused on those states.

From the textile application sectors in Australia analysed, fashion, home and hospitality textiles and athleisure and sportswear seem to be the most interesting for the European companies.

Sustainability and online shopping are currently relevant trends in these textile application sectors.



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