

SUBMISSION: REVIEW OF AUSTRALIA'S TCF INDUSTRY

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Declaration of Interest:

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SMALL IS BEAUTIFUL:

The local millinery industry is a small, but vibrant one. Australian talent is shown to advantage at international competitions in the UK, France and Italy. Our milliners clearly have business & design skills. The Melbourne Cup racing carnival is a national, and international, icon, and an important promotion for the local fashion industry.

Catering largely to our small national population, who purchase or order millinery primarily for special occasions such as racing events, weddings etc, the industry is for the most part made up of small operators, often sole traders. These artisans establish a base of regular clientele, & employ 1-2 employees at most, often part-time, as the business is strongly seasonal.

Despite the (currently) small market & the competitive nature of the industry, the better practitioners can demand very high prices for their work (\$1,000+) & a very healthy profit margin.

The racing industry, particularly the racing clubs, have begun strongly promoting the fashion side to racing events in recent years, supported by

leading department stores & fashion magazines. A younger generation of race-goers is being established.

The international millinery industry is a cohesive community, meeting at fairs & conventions, sharing suppliers & skills. The local industry is closely in touch with new materials, technologies, innovative marketing techniques & other international industry developments. The international trade journal, the Hat Magazine, based in London, exemplifies this global approach.

Milliners have learnt to be pragmatic & flexible, watching their overheads & combining their businesses with other employment.

Despite their cultural & economic contribution to the nation, government assistance or support is virtually unknown.

While local milliners regularly take their product overseas, it is either self-funded or sponsored by private organisations. A group of Melbourne milliners have made a number of trips to Dubai, for the Dubai Cup, self-financed. The Victorian Racing Club has sponsored an overseas promotion to UK, France & Germany for three Victorian milliners. Another Melbourne milliner has self-financed three trips to Louisville, US, for the Kentucky Derby, as well as two trips to UK to undertake further training. A Sydney milliner has taken her hats & those of two others to Ascot.

Access to government support through Austrade is largely denied due to minimum business turnover requirements (\$100,000 pa), despite the many export initiatives milliners have pursued on their own.

Anecdotal evidence suggests that the outbreak of equine influenza on the east coast last year saw turnover drop by 40% for many milliners over the spring season. Despite the heavy publicity, & support measures put in place for racing industry employees, I do not know of a single milliner, or millinery-related business, that received financial compensation as a result of this crisis.

Many milliners who were trained pre-1960's are now retiring. TAFE industry training courses are the only national avenue for millinery skills development & training, & are constantly under budgetary threat. Despite this, millinery is taught at Certificate 4 & Diploma level at a couple of colleges. Apart from this, training must be acquired overseas.

As with the rest of the TCF sector, the industry must compete with cheap overseas imports.

I would like to recommend that, given the nature of the industry & milliners businesses, that government recognise 'milliner collectives' for the purposes of export & international promotional purposes. Our businesses may be small, but there is an abundance of variety & talent.

A small number of like-minded milliners could then apply jointly for export assistance, combining their turnovers to meet minimum requirements. Promotional events overseas such as exhibitions & trade fairs could also be accessed by small groups.

I would also recommend promotion of the millinery industry as a whole, especially the custom or made-to-order segment, & the events that support it such as major & internationally famous racing meets. The reduced barriers to international trading have seen larger Australian fashion industry businesses (ie garment producers) competing successfully overseas.

Melbourne Cup is the race that stops the nation. Let's stop & remember the milliners! We're largely invisible & unacknowledged.

I would have liked to support this submission with statistical evidence (numbers of traders, median turnover etc), as well as case studies to document my contentions, but time does not permit. I would be happy to pursue further evidence if the opportunity arose.