



## The Apparel Industry in Australia<sup>1</sup>

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### 1. Executive Summary

The Australian apparel market can be described as relatively small, competitive and well-served by domestic companies. Nonetheless, this market presents opportunities to Canadian business. Canada and Australia share similar cultures and lifestyle, for example, sports and the outdoors. This translates into similar fashion tastes and trends.

Facing increasing pressure from inexpensive imports, competitive department stores and decreasing prices, Australian retailers are looking for new ways to compete. Some have differentiated by specializing and offering only a particular type of product, such as sportswear. Others sell exclusive product that cannot be found elsewhere. Most have moved to the mid- to high-end of the market. The boutique culture continues strong with consumers.

Canadian firms have a strong reputation for quality and innovative design. They can take advantage of this highly fragmented industry. This can mean greater competition and easier access for new firms/brands. The favourable market presents opportunities in the mid- to high-end range where Canadian companies can fill a gap in the market or a retailer's portfolio, or embody a trend (i.e., "green fashion"). In addition, custom duties for clothing imported into Australia are scheduled to be reduced from 17.5% to 10% as of January 1, 2010.

A key point to bear in mind is the reversal of seasons: they are opposite to the Northern Hemisphere. As a result, fashion trends in Australia tend to lag by six months.

### 2. Market Entry

#### 2.1 Market size

The population of Australia is around 21 million people. The GDP of A\$1.09 trillion is forecast to grow by 2% in 2010<sup>2</sup>. Like Canada, Australia weathered the global financial crisis in a much better position than many other major economies due to its solid financial and banking systems. At the time of writing, the Australian dollar was strong against the Canadian dollar, with C\$1 buying A\$1.04.<sup>3</sup> Increased purchasing power from a high Australian dollar, strong consumer confidence and strong employment growth have all helped drive retail sales in recent years.<sup>4</sup>

In 2008, Australia imported more than C\$4.2 billion of apparel, a 13% increase over 2007. Over 60% of the imports came from China. In the same year, Australia imported over C\$5.3 million

<sup>1</sup> The Government of Canada has prepared this report based on secondary sources of information. Readers should take note that the Government of Canada does not guarantee the accuracy of any of the information contained in this report, nor does it necessarily endorse the organizations listed herein. Readers should independently verify the accuracy and reliability of the information.

<sup>2</sup> *Australia Country Report*. November 2009. Economist Intelligence Unit

<sup>3</sup> Daily Exchange Rate, Bank of Canada, December 2, 2009

<sup>4</sup> *Clothing Retailing in Australia*. October 16 2009. IBISWorld

worth of clothing from Canada, a 10% increase over 2007. “Woven apparel” made up the largest share.<sup>5</sup>

The size of Australia and the distance between major cities have created multiple small markets that vary in needs and preferences, based on climate and culture. The best selection of fashion and apparel can be found in the major urban centres where consumers are more likely and willing to buy better brands. As a result, most international brands are only found in the largest Australian cities and tourist areas such as the Gold Coast (which is a well known international tourist upmarket shopping destination).

## **2.2 Local Capabilities**

Australia is a competitive market. The strength and success of local brands and designers have been well able to compete successfully against high-profile imported and designer goods.

Internationally, Australia is best known for its beachwear, bushwear (e.g. outback, outdoor clothing), urbanwear and high fashion. Currently there are over 5,000 fashion labels in Australia<sup>6</sup> and more than 2,000 companies export fashion.<sup>7</sup>

## **2.3 International Competition**

China dominates the Australian import market due to its low cost. This has increased the pressure on local firms to compete on price. This has resulted not only in a contraction of the domestic industry but also in a new focus on specialization and innovation.

The international fashion and apparel industry presence in Australia is noticeably less than other western markets, such as Canada or Japan. For example, large international firms such as H&M, Zara, Top Shop or The Gap do not have stores in Australia. However, as economies begin to recover from the global financial crisis, The Gap, Abercrombie & Fitch, and Zara have expressed interest in the Australian marketplace.

## **2.4 Canadian Position**

Canadian fashion and apparel is regarded as having innovative design and quality. However, few designers and brands are well known in the Australian market. Interested firms will need to promote and communicate their unique points of difference.

A number of Canadian brands have entered the Australian market by opening their own retail stores. For example, Lululemon and Aldo have used this market entry strategy successfully and are growing.

Point Zero, Buffalo, Gildan, Arc’Teryx, Arianne Lingerie and Paula Lishman are also in the market via direct sales, distributors or agents.

Due to the dominant presence of low cost Asian providers, especially China, it is extremely hard for Canadian companies to compete on price. Successful Canadian firms compete in the mid- to high-end market.

## **2.5 Distinct Fashion Centres**

The main Australian fashion centres are located in the four largest capital cities: Sydney, Melbourne, Brisbane and Perth. Because Australian fashion is directly related to the Australian climate and lifestyle, styles of clothing, trends, and fashion events vary across the major cities and regions.<sup>8</sup> For example, Brisbane fashion focuses more on spring/summer and beachwear

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<sup>5</sup> “Australian Imports: Apparel.” *World Trade Atlas*. December 2009. (Includes imports categorized under HS Codes 61, 62, 4203, 4303).

<sup>6</sup> Ragtrader Fashion Directory 2009

<sup>7</sup> About Australia Fashion, Australian Government, Department of Foreign Affairs and Trade

<sup>8</sup> For more information on the fashion events, refer to section 5, Market Resources.

because of its warm climate, whereas Melbourne will stock both spring/summer and fall/winter fashion because of their hot summers and cooler winters.

As the Australian climate is temperate, this means that international spring/summer/fall apparel has the most success. Few areas make winter clothing necessary. For Canadian firms who specialize in winter clothing, there are possible niche opportunities in winter jackets or winter sportswear, as winter skiing holidays are popular with Australians.

It is also worth noting that there are fairly large distances between capital cities/fashion centres. This impacts directly on which freight options would be used between locations.

## **2.6 Buying Seasons**

In contrast to North America's four distinct buying seasons, Australia typically only has two buying seasons, spring/summer and fall/winter. Australia is sometimes referred to "trans-seasonal" because of its mild winters and because some consumers stretch their wardrobe across all seasons.

Australia's buying seasons are reverse to the Northern Hemisphere. For the spring/summer season, orders are typically placed in April/May. Fall/Winter or trans-seasonal orders are typically placed in September/October.

Buyers placing international orders will typically do so in line with the timings of the Northern Hemisphere; for example, they will buy Spring/Summer from international designers in October 2009, but will hold the merchandise until the Spring/Summer season of September 2010. In other words, fashion trends in Australia tend to be six months behind North America and Europe.

## **2.7 Pricing**

Australia has high retail prices for apparel and other consumer products as compared to Canada. These higher prices are reflective of the mark-up of the distribution chain which is influenced by the higher labour costs and smaller volumes. An order can range from 50 dozen per style, to 300 dozen per style over three colour ways.<sup>9</sup> The average retail mark-up is 100%. (See Section 4.4)

## **2.8 Market Trends**

Over the next decade, there is expected to be an increasing consumer interest in eco-friendly and green fashion and in sustainable products.<sup>10</sup>

## **2.9 Import Regulations**

Customs duties on clothing/apparel imported into Australia from Canada is currently 17.5%. Under the amended 1995 Customs Tariff Act, customs duties on textiles, clothing and footwear are scheduled for reduction on January 1, 2010 and January 1, 2015. From January 1, 2010, the customs duty on Schedule 3, Section XI – Textiles + Textile Articles (Chapter 61 & 62), which include clothing and finished textiles, will be reduced to 10% and will be further lowered to 5% on January 1, 2015.

By comparison, the custom duties on the same articles imported into Australia from the United States (with whom Australia has a Free Trade Agreement) will decrease from the current 15.5% to 8% on January 1, 2010. The US will be free from customs duties on clothing and textiles as of January 1, 2015.

The customs duty decrease is expected to increase import competition, thereby putting pressure on domestic manufacturers. To mitigate negative impacts, the Australian Government announced during the May 2009 Federal Budget, "that it will drive innovation and renewal in the Australian Textile Clothing and Footwear (TCF) industries by investing \$401 million in a retargeted TCF

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<sup>9</sup> Australia – A guide to the market, 2009

<sup>10</sup> IBIS World Press Release Aug. 19, 2009

innovation package from 2009-10 to 2015-16.” (For more information on this and other related programs please visit the following website:  
<http://www.ausindustry.gov.au/Manufacturing/TextilesClothingandFootwearTCF/Pages/Textiles.ClothingandFootwearPrograms.aspx>)

### 3. Retail Channels

The retail sector in Australia is dominated by major retail groups, department stores and discount stores with the following major players:

#### Department Stores

- Myer (66 stores)
- David Jones (39)
- Harris Scarfe (38)

#### Discount Department Stores

- Target (283 stores)
- Kmart (170)
- Big W (158)
- Best & Less (164)

#### Major Retail Groups (Apparel)

- The Just Group
- Ascendia Retail
- Specialty Fashion Group
- Sussan Corporation

Other players in the retail sector include specialty or independent boutiques, independent retail chains (typically only a single brand/chain), and international brands with a retail store presence in Australia.

#### *Movement in the Retail Sector*

A number of major Australian retailers have recently announced initial public offerings (IPOs). Myer, a department store has recently listed on the Australian Stock Exchange (ASX), as did Kathmandu (an outdoor clothing & equipment retailer). There is also speculation that Rebel Sport, Retail Apparel Group and Ascendia Group (which owns sportswear and urbanwear retail chains) are considering IPOs.

#### *Retail Experience*

The retail experience in Australia (e.g., online shopping, store experiences, number of international brands, customer service) is not as developed as in other Western countries. This may result from the relative size of the Australian market, the geographic distance from other markets, the number and strength of Australian designers, and/or the needs and preferences of Australian consumers. The retail industry, however, has recognized the need for Australian “retail reinvention”. The Westfield Group, Australia’s largest shopping centre owner, organizes an annual World Retail Study Tour and hosts breakfast seminars on various retail topics that are very well attended.

Online retailing has been identified as a key growth area with large potential in Australia, as elsewhere. Many retailers are only beginning to establish a sophisticated online retail presence for their brands. IBIS World has stated that online retail would post an average yearly sales growth of 4.3% per annum over the next five years to 2014, to a total of A\$15.8 billion in 2008-09.<sup>11</sup>

#### 3.1 Department Stores

The department stores are a dominant player in the Australian retail industry and compete strongly with independent retailers. In the past year, the department store sector is anticipated to attain revenues of A\$19.95 billion.<sup>12</sup> Previous figures released by IBIS World show that department stores account for about 40% of total clothing sales.

<sup>11</sup> IBIS World Press Release April 23, 2009

<sup>12</sup> IBIS World Press Release Aug 19, 2009

## *Myer*

Myer, the largest department store in Australia, positions itself as a mid-range fashion provider, although it also carries high-end fashion labels. In November 2009, Myer conducted an A\$2 billion initial public offering, the largest Australia has seen in over two years. They have also recently announced expansion plans to open 14 new stores by 2014, bringing the national store count to 80.

Womenswear and accessories continue to drive financial growth at Myer. Womenswear is made up of contemporary designers (international and Australian), national brands and private brands. The international brand/designer space in Myer is competitive due to high sales of Australian brands. The company looks for international brands that will be recognised by their customers, a brand that fits well within their portfolio (so as not to cannibalize other international products) and offers value for money. Each international brand must have a point of difference, and be sustainable and able to refresh product often. International brands are only sold in a few Myer stores with the best selection in the flagship stores in Sydney and Melbourne.

The womenswear buyer for Myer attends all four major fashion shows (New York, London, Paris, and Milan) as well as the Coterie Trade Show in New York.

## *David Jones*

David Jones (DJs) is positioned as the leading high-end fashion provider and a strong supporter of local fashion labels. There is a strong rivalry between Myer and David Jones, especially for high-end and international fashion labels.

The international brand/designer space in David Jones is even more competitive than Myer. DJs only stocks international brands that are well known and established. They are not keen on brands that are new or emerging. As a result, they are reluctant to take risks on “trendy” international brands. Their clientele is very brand focussed, and is willing to spend money on designer clothes. DJs’ flagship stores in Sydney and Melbourne carry the largest selection of international brands, with selection decreasing the further the stores are from the urban city centres.

The buyer for DJs attends all four major fashion shows (New York, London, Paris, and Milan).

### **3.2 Discount Department Stores**

#### *Target Australia*

This company has no affiliation with the Target Corporation US.

Target’s positioning strategy is at the middle market below Myer and David Jones, but above other discount department stores. They aim to provide on-trend fashion at prices that are 20-30% less than competitors. As part of this positioning strategy, they have introduced collections from designers such as Stella McCartney, Josh Goot, Yeojin Bae, Gail Sorronda and Zac Posen. With H&M, Zara and Top Shop absent from the market, Target seems to be filling the void of “cheap and trendy”.

Their 283 stores are split between 167 Target stores (located in cities and major regional centres) which are larger and offer the full range, and 116 Target Country stores (located in smaller regional centres) which offer a limited range.

#### *Kmart and Big W*

Kmart and Big W are the two major discount department stores that are positioned as everyday value, and generally focus on low-cost merchandise. As such, both have product sourcing offices in Asia (Kmart in Hong Kong, Shanghai and Delhi, BigW/Woolworths Limited in Hong Kong) to source products directly from that region.

For Big W, while their focus is on low-cost merchandise, they also position themselves as offering the “brands you know and trust”. This can include brands by well known designers in the Australian market. As an example, Big W recently announced the launch of a collection by Australian designer Peter Morrissey.

#### Major Retail Groups and Retail Chains

There are a number of major retail groups in Australia, each of which own a number of retail chains within their portfolio. Many of these groups and chains are Australian owned. Figures released by IBIS World show that franchised and chain stores account for about 40% of total clothing sales. Table 1 lists the major retail groups and their associated retail chains.

**Table 1:**

<b>Major Retail Groups (Apparel)</b>	
Just Group	<ul style="list-style-type: none"> <li>• Dotti 14 stores (womenswear)</li> <li>• Jacqui E 81 stores, (womenswear)</li> <li>• Jay Jays 220 stores (mens and womenswear)</li> <li>• Just Jeans 213 stores (womenswear)</li> <li>• Peter Alexander 9 stores (sleepwear)</li> <li>• Portmans 107 stores, (womenswear)</li> <li>• Smiggle (stationery)</li> </ul> <p>(Note: Most brands also have a presence in NZ, plus Jay Jays is also in South Africa)</p>
Ascendia Retail	<ul style="list-style-type: none"> <li>• Amart All Sports 80 stores (sportswear)</li> <li>• Glue Store 16 stores, NSW, VIC, (womens and mens wear)</li> <li>• Rebel Sport 56 stores, including 1 outlet (sportswear)</li> </ul>
Specialty Fashion Group	<ul style="list-style-type: none"> <li>• Autograph 126 stores, (womenswear – plus sizes)</li> <li>• City Chic 41 stores, (womenswear – plus sizes)</li> <li>• Crossroads 113 stores (womenswear)</li> <li>• Katies 154 stores, (womenswear)</li> <li>• Millers 352 stores, (womenswear)</li> <li>• Queenspark 17 stores (womenswear)</li> </ul>
Sussan Group	<ul style="list-style-type: none"> <li>• Sussan 195 stores, (womenswear)</li> <li>• Sportsgirl 108 stores (womenswear)</li> <li>• Suzanne Grae 208 stores, (womenswear)</li> </ul>
General Pants Group	<ul style="list-style-type: none"> <li>• General Pants Co 36 stores, (mens and womenswear)</li> <li>• Jetty Surf 20 stores, (mens and womenswear)</li> <li>• Surf Dive n Ski 14 stores, NSW (mens and womenswear)</li> </ul>
Apparel Group	<ul style="list-style-type: none"> <li>• SABA 44 stores, including concessions (mens and womenswear)</li> <li>• Sportscraft 99 stores, including concessions (mens and womenswear)</li> </ul>
Webster holdings	<ul style="list-style-type: none"> <li>• Jigsaw 30 stores, including concessions (womenswear)</li> <li>• David Lawrence 100 stores, including concessions (mens and womenswear)</li> <li>• Marcs 38 stores, including concessions, outlets, mostly in NSW, VIC, QLD (mens and womenswear)</li> </ul>
Cue	<ul style="list-style-type: none"> <li>• Cue Design 144 stores including concessions (womenswear)</li> <li>• Veronika Maine 17 stores (womenswear)</li> </ul>

**Source:** Inside Retailing Directory 2009

For the majority of these retail chains, most products are sold under the label/brand of the retail chain. Ascendia Retail and General Pants Group are the exception: their stores sell a variety of different brands. For example, Glue Store claims to be a branded fashion retailer selling the world’s best brands and Surf Dive n Ski carries a variety of well known surf brands.

There are also other specialty retail chains that are not part of these groups, but are significant in that they have over 50 stores, including:

- Cotton On 450 stores (estimated), (mens, womens, and kids/babywear)
- Country Road 53 stores, (mens and womenswear)
- Colorado 103 stores, (mens and womenswear)
- Jeanswest 185 stores, plus stores in China and NZ (mens and womenswear)
- Witchery 100 stores, 34 concessions, 6 outlets (mens and womenswear)
- Supre 143 stores, (womenswear)
- Valleygirl 62 stores, (womenswear)

Most retail groups have buyers within each of the individual specialty chains that will source the products and/or materials for clothing carried within their stores.

Many of the retail chain stores are located in major shopping centres or shopping districts. Growth is through new store openings and acquisitions. Expansion through new stores often coincides with the opening of new shopping centres.

### 3.3 Specialty or Independent Boutiques

Outside all of the retail chains and major retail groups, there are a variety of specialty stores and boutiques, typically independently owned and with only a few locations. Figures released by IBIS World show that this type of store accounts for about 20% of total clothing sales.

The boutique culture persists in Australia, particularly in the women's apparel industry. In response to growing competition, many retailers have opted for specialization, thus many existing or new stores appear to sell one particular type of clothing or exclusive product that cannot be found in other retail outlets.

The ways in which products/stock is sourced can vary depending on their target market and size. Product sourcing for these stores can vary from purchasing directly, or purchasing through a buying group, fashion agent or wholesalers.

For mid- to high-end fashion, it is common for stores to purchase small volumes directly from overseas designers. These stores are also quite selective when choosing new labels and often interested in obtaining a level of exclusivity. They look for products that will differentiate them from the department store and chain store offerings.

Boutiques present a key area of opportunity for Canadian designers and brands as they are more willing to introduce new, emerging or unknown designers in their stores.

### 3.4 Outdoor Adventure Apparel Retailers

Outdoor adventure apparel is an important sub-sector of Australia's apparel industry. It is typically sold through retail stores that specialise in outdoor adventure clothing and equipment. There are a number of Australian/New Zealand companies in the market including Kathmandu, Snowgum, Paddy Palin, Mountain Designs and Anaconda. These chains will typically have a buying department within their head office that will source products directly.

Due to Canada and Australia's similar interest in sports and outdoor activities, this sub-sector presents an opportunity for Canadian brands to enter the market with unique and high-quality products.

**Table 2:**

<b>Outdoor Adventure Stores</b>	
Kathmandu	41 stores in Australia, 30 stores in NZ, and 6 in the UK. Head offices in Christchurch, NZ, and Melbourne, Australia
Snowgum	33 stores in Australia, 2 in NZ
Paddy Palin	13 stores in Australia
Mountain Designs	34 stores in Australia, 5 in NZ
Anaconda Group	16 stores in Australia, parent company is Spotlight Group

### 3.5 Location of Retailers

In Australia, most major stores are in shopping centres (malls) and main-street shopping districts.

In the central business district of major capital cities, a number of small shopping centres or arcades often converge onto a main shopping street (for example, Pitt St in Sydney, Bourke St in Melbourne, Queen St in Brisbane). Major capital cities have fashion high streets, such as Chapel

St in Melbourne or Oxford St in Sydney. Many regional towns and suburbs within major cities are also likely to have clothing retail stores located on the main streets.

Westfield Group is the largest shopping centre owner in Australia. It has 44 centres across Australia (including locations in all major cities and key regional markets).

Outlet stores are often consolidated in shopping centres such as Direct Factory Outlet (DFO), which operates 10 centres.

Although online retail is not currently a leading distribution channel in Australia, it has been identified as an important growth sector.

#### 4. Distribution Channels

##### 4.1 Direct Sourcing

Major retailers typically have designated buyers within their organisation, and many of these retailers source product directly from designers.

##### 4.2 Major Wholesalers and Distributors

The major wholesaler/distributor apparel groups in Australia include Pacific Brands, The Pacific Apparel Solutions Group, Gazal Corporation, Mercury Brands (formerly Austin Group) and True Alliance. A number of these are vertically integrated, that is, they are involved in multiple channels (eg. design, manufacturing, importing and/or retail channels).

Many brands are sold in major department stores, while some have their own retail store presence. Details of each of these wholesalers/distributors are outlined in Table 3.

**Table 3:**

<b>Major Wholesalers/Distributors</b>		
Pacific Brands	Large wholesaler and manufacturer of brands across a range of categories, although recently has moved some of its manufacturing offshore.	Examples of Brands: <ul style="list-style-type: none"> <li>Underwear: Bonds, Berlei, Holeproof, Rio</li> <li>Hosiery: Razzamatazz, Voodoo, Kayser, Platinum</li> <li>Outerwear (including workwear, school wear, B2B contract uniform business, sports brands)</li> <li>Home comfort: Sheridan, Tontine, Sleepmaker</li> <li>Footwear: Volley, Hush puppies, Clarks, Grosby, Dunlop, Freeman, Naturalizer</li> </ul>
The Pacific Apparel Solutions (PAS) Group	One of the largest wholesale apparel companies in Australia.	Examples of Brands: Yarra Trail, Breakaway, Designworks, The Hopkins Group, Review, Capelle, Fiorelli and Metalicus.
Gazal Corporation (GZL)	Large publicly listed branded apparel companies in Australia. GZL primarily owns the brands that it manufactures, markets and distributes.	Brands: <ul style="list-style-type: none"> <li>Outerwear: Trent Nathan, Bisley, Bracks, Fred Bracks, Paramount, Midford</li> <li>Intimate Apparel: Lovable, Crystelle, VanHeusen, Calvin Klein, HoldMeTight, Davenport, Body (Nancy Ganz)</li> <li>Retail: Calvin Klein, Brands United, Trade Secret</li> </ul>
Mercury Brands (Rebranded from Austin Group in July 2008)	Apparel designer, importer and wholesaler. Over 20 brands across women's men's and children's wear.	Brands: <ul style="list-style-type: none"> <li>Childrens: Milly, No Fear, Paperdolls, Jimmie Jams, Billiecart, Leroy</li> <li>Mens: No Fear, Wesc, Crusty Demons, Kangol</li> <li>Womens: Rochford, Purr, French Kitty, Itsu, Contempo, Voodoo Dolls, BB Dakota, JL, Kangol</li> </ul>
True Alliance	Large distributor of sport and fashion brands in Australia and New Zealand	Brands: Ben Sherman, Chantelle, Lacoste, The North Face, Passionata, Reebok, Rockport, Royal elastics, Simple Shoes, Speedo, Teva, and UGG brands

### 4.3 Fashion Agents

For fashion labels, there are a large number of fashion agents in Australia. However, as many agents are state based, more than one agent may be required in order to get national coverage.

The good agents are sought after and can be selective about the labels they represent. Differentiation is important, as many agents will be unwilling to take on a new label that is too similar to their current portfolio.

### 4.4 Mark-Ups in the Distribution Channel

It is important to be aware of the mark-ups within the distribution channels and the pressure on pricing. The Chamber of Commerce & Industry of Western Australia has published a general guide to the Australian market which includes an estimate of the mark-ups within the distribution channel. See Table 4.

**Table 4:**

Estimated Mark-Ups within the Distribution Channel	
Overseas buying agents	Between 3-6% FOB
Importers/Wholesalers of volume-selling consumer products	40-80% on landed/duty paid price (depending on the product)
Discount department stores	35-40% on the sell price
Department stores	40-75% on the sell price
Small retail outlets	50-100% on the sell price
Supermarket chains	15-35% on the sell price

**Source:** Australia: A guide to the market 2009, Chamber of Commerce & Industry of Western Australia, page 39

## 5. Market Resources

Table 5 lists the key associations, organisations and relevant websites for the fashion industry and retail sector in Australia.

Main associations related to the apparel industry are national, often with their offices in Melbourne (which is known as the fashion capital of Australia). Emerging more recently as a fashion centre, Perth, Western Australia (WA), has specific associations to promote the WA fashion industry, including the West Australian Fashion Industry Association and Fashion Agents Association of Western Australia.

Australia's premier and sole industry-only fashion event, the Rosemount Australian Fashion Week, is held annually in May in Sydney and is produced by IMG International. Fashion Exposed + *preview* is the largest fashion trade show in Australia and rotates annually between Melbourne and Sydney. The very successful L'Oréal Melbourne Fashion Festival (LMFF) is held in March annually and showcases Fall/Winter fashion that is available in stores.

Due to the success of the LMFF all four major cities, (i.e. Sydney, Melbourne, Brisbane, Perth), now host an annual "Spring Fashion Festival", but Melbourne is the only city to do two, a Spring/Summer in September and Fall/Winter in March.

**Table 5:**

<b>Useful Links</b>	<b>Website</b>
<b>Associations/Councils</b>	
The Council of Textile and Fashion Industries Australia <i>(peak industry representative body for the textile, clothing, footwear and fashion industries)</i>	<a href="http://www.tfia.com.au">www.tfia.com.au</a>
Australian Fashion Council	<a href="http://www.australianfashioncouncil.com">www.australianfashioncouncil.com</a>
Textile, Clothing and Footwear Union of Australia (TCF)	<a href="http://www.tcfua.org.au">www.tcfua.org.au</a>
West Australian Fashion Industry Association (WAFIA)	<a href="http://www.wafia.com.au">www.wafia.com.au</a>
Fashion Agents Association of Western Australia	<a href="http://www.fashionagentswa.com">www.fashionagentswa.com</a>
Design Institute of Australia	<a href="http://www.dia.org.au">www.dia.org.au</a>
Fashion Technicians Association Australia	<a href="http://www.ftaa.com.au">www.ftaa.com.au</a>
Australian Sporting Goods Association (ASGA)	<a href="http://www.asga.com.au">www.asga.com.au</a>
The Australian Centre for Retail Studies	<a href="http://www.buseco.monash.edu.au/centres/acr/index.html">www.buseco.monash.edu.au/centres/acr/index.html</a>
The Fashion Group International in Sydney	<a href="http://sydney.fgi.org">http://sydney.fgi.org</a>
<b>Industry News and Directories</b>	
Ragtrader	<a href="http://www.ragtrader.com.au">www.ragtrader.com.au</a>
Australasian Textiles & Fashion (ATF)	Magazine: <a href="http://www.atfmag.com">www.atfmag.com</a> Textiles Portal: <a href="http://www.textileb2bcentral.com">www.textileb2bcentral.com</a> Apparel Portal : <a href="http://www.apparelb2bcentral.com">www.apparelb2bcentral.com</a>
Stylefile (by Austrade) - Profile of Australian designers	<a href="http://www.stylefile.com.au">www.stylefile.com.au</a>
Fashion Rules – A guide to IP for Australia’s Clothing and Fashion Design Industry	<a href="http://www.ipfashionrules.gov.au">www.ipfashionrules.gov.au</a>
Inside Retailing	<a href="http://www.insideretailing.com.au">www.insideretailing.com.au</a>
<b>Major Australian Fashion Events</b>	
Fashion Exposed + <i>preview</i> , Australia’s premier fashion trade show, 14-16 February, Sydney	<a href="http://www.fashionexposed.com/">http://www.fashionexposed.com/</a>
L’Oréal Melbourne Fashion Festival, F/W 10, March 14-21, 2010 (Australia’s largest consumer and retail driven fashion event)	<a href="http://www.lmff.com.au">www.lmff.com.au</a>
Rosemount Australian Fashion Week, Spring/Summer 10/11, Sydney, May 3-7, 2010 (Australia’s premier and sole industry-only fashion event)	<a href="http://www.rafw.com.au">www.rafw.com.au</a>
Rosemount Sydney Fashion Festival (S/S consumer-driven fashion event), August 2010	<a href="http://rsff.com.au">http://rsff.com.au</a>
Melbourne Spring Fashion Week, September, 2010 (consumer-driven fashion event)	<a href="http://www.msfw.com.au">http://www.msfw.com.au</a>
Perth Fashion Festival, September, 2010 (consumer-driven fashion event)	
Mercedes-Benz Fashion Festival, Brisbane, September 2010 (consumer-driven fashion event)	<a href="http://www.mbff.com.au">http://www.mbff.com.au</a>