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3 March 2003

The Commissioner  
Textile, Clothing, Footwear and Leather Inquiry  
Productivity Commission  
PO Box 80  
BELCONNEN  
ACT 2616

To the Commissioner

Apparel production in Australia is moving offshore due to reduced tariffs and lower labour costs overseas. Labour costs in Australia are unlikely to reduce. In this climate Australian apparel manufacturers cannot compete on the basis of price but it can compete on the basis of higher quality apparel and quicker response to market needs.

### **How do we do that?**

We believe that the Australian Apparel Industry is interested in improving their fit, made to measure capability and stock efficiencies. This will allow the Australian apparel industry to achieve a sustainable competitive advantage.

Using a similar approach the French navy have identified the following benefits:

The French Navy is in charge of issuing garments to 65,000 men and women (among them 18,000 are conscripted new recruits) per annum. The Clothing Bureau of the Navy manages a US\$ 40,000,000 budget per annum and garments stocks of US\$ 65,000,000 worth. Since February 1996 they have been using an anthropometrical database as a reference for determining its order plans. The Commissionnaire-en-chef de 1ere classe, chief of the Clothing Bureau, Michel Diebold says, 'We invested US\$ 260,000 initially [in the database] and then less than US\$ 200 000...we hope to save at short term from five to six months of garment stocks and to avoid unsold stock holdings. Such savings represent several million dollars.' He further comments that benefits are 'right issue of garment sizes and, above all, the capacity to manage stocks according to the population to clothe and not to the past years consumption.' <http://www.symcad.com/eng/ukpress.htm>, date 18/10/00

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## Potential

The following achievements could be expected:

- Better fit of clothing;
- Quicker response to individual customer needs;
- Less stock – reduced by half – including less unsold stock;
- Reduced returns;
- Warehouse and shop efficiencies;
- Reduced stock and measurement errors.

## How?

Surveys of body size of inhabitants of various countries are conducted regularly in order to provide standardisation data for a range of industries and to monitor physical status that is an indicator of the health of a population. In the United States the National Centre conducts such surveys For Health Statistics (Frisancho 1990). There occur intergenerational changes in human body size and shape often called “secular trends”. These require periodic updates of established body size standards. Secular changes affect distribution of clothing sizes in the population. They may also render some combinations of various body measurements, as defined for particular size grades, obsolete.

A representative survey of body size and shape of Australian population has never yet been conducted, nor any updates of existing standards made based on actual surveys of Australians. In 1926-28 Berlei Ltd. conducted a survey of 26 characteristics of 5000 Australian women. Unfortunately subject selection was not random and age representation biased. The survey is obviously outdated now. Recently the National Heart Foundation of Australia and the Australian Bureau of Statistics conducted surveys of several thousand women, but only heights and weights (self reported) were investigated. The Standards Australia publications regarding body size and proportions are based on 1959 American data. It is a common perception in the clothing industry that existing standards lead to production of ill-fitting clothing and hence wastage and customer dissatisfaction. The project will reduce production wastage resulting from manufacturing of ill-fitting garments and sizes that are poorly represented in the population. It will also make Australian industry more competitive as lower production costs will be reflected in lower prices while better fit of garments will increase their quality and customer satisfaction. Clothing styles can be developed more efficiently in Australia, local production can be of higher quality, while clothing for import to Australia can also be better manufactured if current sizing standards applicable to Australian market are available. This may enhance

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international collaboration and enable at very least pre-production activities to remain in Australia.

There is no longer any reason to assume that data from American surveys or surveys conducted in other First World countries are directly applicable to the present-day Australian population with its unique history of ethnic composition and lifestyles that influence child growth patterns and adult body size and proportions.

SHARP Dummies suggests provision be made in planning for the future for the support of research and development in the Australian Apparel Industry in the areas of anthropometric up-dates of data and standards and the provision of support for Australian pre-production facilities via translation of that data into immediately useful products such as mannequins and blocks.

Delivering fit and efficiencies to the Australian Apparel Industry will improve their sustainable competitive advantage by increasing their ability to produce higher quality and better fitting apparel and respond quickly to customer demand.

Yours faithfully

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