



BAGONG PILIPINAS

# TVET SKILLS INSIGHTS REPORT | 2025

THREADS OF HERITAGE: SKILLS, DEMANDS,  
AND OPPORTUNITIES IN PHILIPPINE  
TRADITIONAL EMBROIDERY

## I. Background

Embroidery in the Philippines is a centuries-old craft introduced during the Spanish colonial era, where nuns in convent schools taught young women intricate needlework. Over time, this skill spread beyond religious institutions, providing livelihood opportunities and flourishing across various regions. Today, the country is home to skilled embroiderers, each contributing to the preservation and evolution of this traditional art.

Notable embroidery hubs include **Lumban, Laguna**, famed for its intricate embellishments on the **barong Tagalog**; **Kalibo, Aklan**, and **Taal, Batangas**, where artisans meticulously embroider delicate **piña** and **jusi** fabrics; and the **Itneg of Abra**, known for their distinctive embroidery styles integrated into handwoven textiles. In Mindanao, the **Mandaya of Davao** and **T'boli of Lake Sebu** create intricate designs that reflect their deep cultural heritage, using embroidery to tell stories of nature, ancestry, and spirituality.

A hallmark of Philippine embroidery is the **calado** technique, a labor-intensive process of removing and reinforcing fabric threads to create elegant lace-like patterns. It is primarily used in embroidery in Lumban and Taal. Indigenous groups also incorporate embroidery into their textiles, such as the **T'boli's t'nalak**, the **Mandaya's dagmay**, and the **B'laan's mabal tabih**, each infused with cultural symbolism.

While modernization has changed consumer preferences, Filipino artisans and brands are championing efforts to preserve and innovate embroidery techniques. With the global rise of sustainable fashion and artisanal craftsmanship, Philippine embroidery is experiencing a resurgence, gaining recognition for its artistry, cultural depth, and timeless elegance.

Several designers, artisans, and communities continue the rich tradition of embroidery, much like Patis Tesoro, who is regarded as the Grand Dame of Philippine Fashion. Patis Tesoro has played a significant role in promoting local arts and crafts through her meticulous creation of one-of-a-kind textiles, clothing, home décor, and fine art, many of which have reached markets around the world. Through her landmark achievement in reviving the national textile piña, Patis Tesoro has emerged as a symbol of "Filipinism," which is defined as a unique form of nationalism rooted in the ideals of José Rizal. It seeks to unite Filipinos by drawing on a shared—though sometimes imagined—past, using powerful national symbols like the flag, anthem, and historic narratives of heroism and resistance.

Patis Tesoro carved her niche in the competitive world of apparel and non-apparel, a sector that spans everything from garments—excluding leather, footwear, and knits—to household and specialty textile items. Her creations stood out for their luxurious, high-end quality, anchored in a deep love for Filipiniana. According to her, she wants to be known in history for the Filipiniana, affirming her commitment not only to tradition but also to innovation. Her vision was clear: to make Filipino-made fashion modern, wearable, and relevant for the younger generation.

Tesoro's style makes use of a mixture of patterned fabrics with intricately embroidered *nipis* (which refers to "delicate textiles woven from abaca, pineapple, maguey, and raw silk), embellishments, beadwork, geometric designs, hand-painted decorations, and meticulous

patchwork. This style provides tactile depth, textures, and layers to the smooth surface of the fabric, patterned or otherwise.

Aside from being a renowned Filipiniana textile artist & dressmaker, Patis Tesoro is positioned as a living heritage brand, actively participating in the LOHAS (Lifestyles of Health and Sustainability) industry, specifically within the broader market of sustainable economies and eco-conscious lifestyles. Her brand is envisioned to have continued success as a powerful symbol of heritage, one that celebrates the distinct beauty of Filipino craftsmanship and culture through globally recognized high-end Filipiniana apparel and non-apparel products.

In recent years, the landscape had shifted. A new wave of local designers, inspired by Tesoro's trailblazing work, emerged, thus developing the market further.

## **II. Main Discussion**

### **Embroidery Industry Classification**

According to the Philippine Standard Industrial Classification (PSIC), embroidery activities can be classified under Division 14: Manufacture of Wearing Apparel, further into 1410 - Manufacture of wearing apparel, except fur apparel, since embroidery is involved in embellishing garments and other textile products. It can also be classified under Division 13: Manufacture of Textiles, further into 13950 - Manufacture of embroidered fabrics, and 1399 - Manufacture of other textiles, n.e.c.

For embroidery activities considered as artisanal or craft-based service, this can be classified under Division 74: Other Professional, Scientific and Technical Activities of the PSIC, particularly 7410 - Specialized design activities, since this class includes "fashion design related to textiles, wearing apparel, shoes, jewelry, furniture and other interior decoration and other fashion goods as well as other personal or household good."

### **Economic Contributions**

In a report by the Manufacturing Industries Service of the Bureau of Investments (BOI), it was reported that, based on the preliminary results of the 2022 Annual Survey of Philippine Business and Industry, there are 269 companies engaged in the different stages of textile manufacturing in the Philippines. More than 50% of the textile companies manufacture textile for industrial use. More than 15,000 workers are employed in the textile industry.

Meanwhile, the garment industry is highly concentrated in 3 regions, namely the National Capital Region, Region 3, and Region 4A. It is an emerging industry in Region 7, as Cebu is the primary producer of the best garment products in the Central Philippines. There are more than 70,000 workers and 999 establishments in this industry. In terms of domestic orientation, the Taytay Garment Industry provides a significant contribution to the industry with its 190 registered garment manufacturers, 29 registered ready-to-wear (RTW) retailers, and 4,000 market sellers. On the other hand, the Philippines also caters to global brands in major markets such as the USA, Europe, South Korea, and Japan.

The Philippine Textile Research Institute (PTRI) of the Department of Science and Technology (DOST) also reported the export value of the garments and textile trade in the Philippines, with the following major export markets as of 2024:

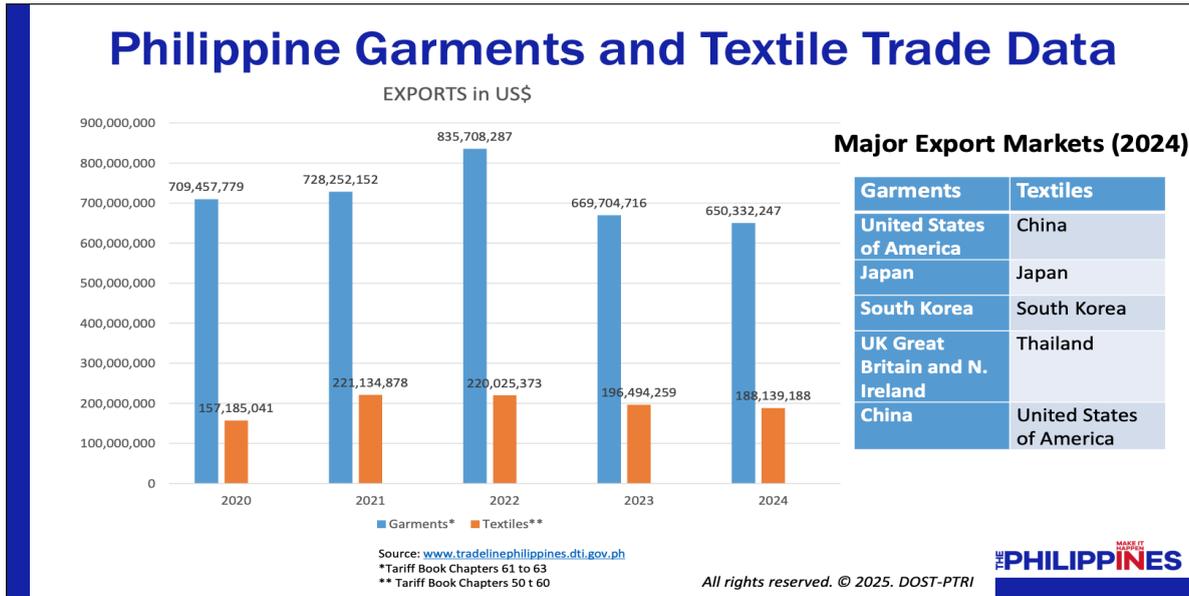
Table 1. List of Major Export Markets and Import Suppliers (2024)

Export Markets		Import Suppliers	
Garments	Textiles	Garments	Textiles
United States of America	China	China	China
Japan	Japan	Vietnam	Japan
South Korea	South Korea	Bangladesh	South Korea
UK Great Britain and N. Ireland	Thailand	Indonesia	Vietnam
China	United States of America	Cambodia	Taiwan

Source: DOST-PTRI

Based on the data provided below, garment exports have shown consistent growth, peaking in 2022 at \$835.7 million, before experiencing a slight decline. This suggests a resilient industry with strong global demand. Conversely, the textile sector has exhibited volatility, with significant fluctuations in export values. While it also peaked in 2022 at \$230 million, it saw a sharp drop in 2023, indicating potential challenges in the sector. The overall trend highlights the garment industry's strength and the need for focused strategies to stabilize and enhance the textile sector's performance.

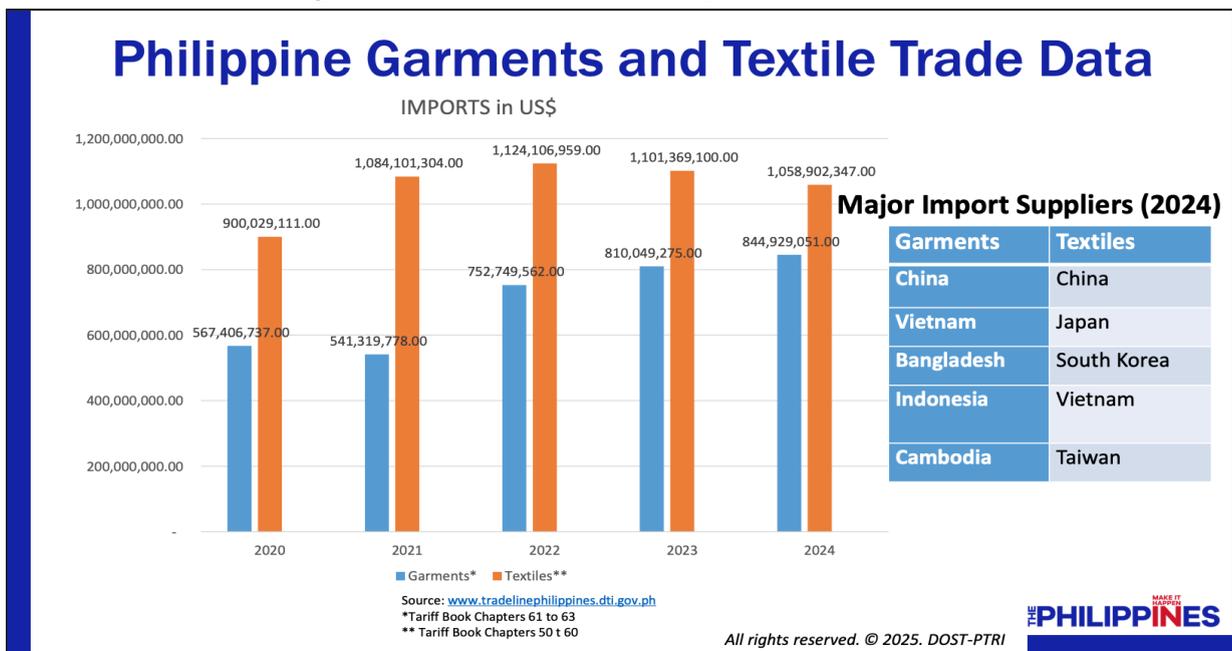
Figure 1. Garment vs. Textile Export Data in USD



Source: DOST-PTRI

On the other hand, textile imports, starting at \$900 million in 2020 and reaching \$1.05 billion by 2024, consistently exceeded garment imports, which began at \$567.4 million and ended at \$844.9 million in the same period. This highlights a potential gap in domestic textile manufacturing. While Garment imports experienced fluctuations, dipping to \$541.3 million in 2021 before peaking at \$810 million in 2023, the overall trend underscores a rising import dependency. This necessitates strategic interventions to strengthen local production and reduce reliance on foreign suppliers.

Figure 2. Garment vs. Textile Import Data in USD



Source: DOST-PTRI

With the data provided, it can be seen that the Philippine Garments sector initially showed a positive net export from 2020 to 2022, peaking at \$186.9 million in 2021. However, this trend reversed in 2023 and 2024, resulting in a negative net export of -\$194.5 million by 2024. In contrast, the Textile sector consistently exhibited a substantial trade deficit, with a negative net export ranging from -\$742.8 million in 2020 to -\$904.6 million in 2023. This data underscores the Philippines' heavy reliance on textile imports and the shifting trade dynamics within the Garments sector, highlighting the need for strategic interventions to balance trade and enhance domestic production.

### **Challenges and Opportunities of Traditional Embroidery**

Traditional Philippine embroidery is a treasured craft that blends cultural heritage with fine artistry. It plays a significant role in both artisanal communities and the haute couture scene. However, this industry faces several pressing challenges.

Despite its cultural value, interest from the general public and especially the youth is dwindling, raising concerns about the continuity of this skill. This poses an issue to a potential skills gap as seasoned artisans age, since the intricate art of hand embroidery struggles to captivate younger generations. Traditional embroidery products also often lack visibility in broader markets, restricting their commercial potential. Additionally, there is a growing risk of traditional designs being copied by fast-fashion brands, diluting their authenticity and threatening the livelihood of artisans. With a narrower target market, employment opportunities in embroidery become more limited and are often deprioritized in favor of more scalable or in-demand jobs. Furthermore, in attempting to increase productivity in embroidery through industrialization, it runs the risk of losing some creativity. In the same vein, in keeping the quality of the embroidered product through the meticulous processes and intricate materials, the customer base becomes more limited as the products become accessible only to a niche, high-end market.

Nevertheless, opportunities abound. Collaborations between traditional artisans and modern fashion designers can elevate embroidery into high fashion while preserving its cultural essence. Digital marketing and e-commerce platforms provide a global stage for Filipino artisans, increasing exposure and demand. Moreover, educational initiatives and curriculum integration can help revive interest among younger generations, ensuring that this intricate skill is passed on.

With the right support and innovation, Philippine embroidery can thrive—not only as a cultural legacy but as a vibrant contributor to contemporary fashion.

### **Job Classification and Employment**

Based on the Philippine Standard Occupation Classification (PSOC), embroidery falls under Craft and Related Trade Workers, specifically Handicraft Workers. According to the PSOC, handicraft workers use both artistic and manual skills to create, repair, and decorate a wide range of items, including musical instruments, jewelry, ceramics, and household goods. Embroidery is one of the key specializations as it involves applying traditional patterns and techniques to produce embroidered garments and household articles. More specifically,

embroidery can be further classified under 7318 - Handicraft Workers in Textile, Leather and Related Materials, as one of the tasks is “lace-making and weaving, knitting, or embroidering various garments and articles for household use.” It can also be classified under 7533 - Sewing, Embroidery and Related Workers, wherein one of the tasks is “embroidering ornamental designs on cloth by hand or machine using needle and colored threads.” Embroiderer (multi-head machine) and hand embroiderer are examples in this classification. Embroidery can also be classified under 815 - Textile, Fur and Leather Products Machine Operators, particularly for the embroidery of ornamental designs on garments or other materials, but it should be noted that workers in this classification use machinery to embroider.

According to the 2022 ASPBI, there are 64,633 workers in the Manufacture of wearing apparel, except fur apparel industry group. This represents 5.41% of the total employment in the manufacturing sector. The Philippine Statistics Authority’s Integrated Survey on Labor and Employment (ISLE) 2017/2018 reported that there are 7,677 vacancies under Sewing, embroidery and related workers. The average monthly wage rate for these workers as of August 2018 is Php 10,661.00.

### **Training and Career Pathways**

In the Philippines, the Training Regulations on Hand Embroidery NC II involve the conduct of preparatory activities, perform embroidery, and market embroidery products. The equivalent jobs for this program are embroiderers and embroidery product marketers. Based on TESDA’s consultation with Patis Tesoro last March 2025, master embroiderers must also be skilled, artistic, and creative. Patis Tesoro’s boutique and workshop are located in San Pablo, Laguna, which is in the same province as Lumban, where her embroiderers are usually from. Patis Tesoro’s team of around 20 employees possesses essential manufacturing skills, including tailoring, sewing, both machine and hand embroidery, hand painting, and beading. She also works with a trusted network of suppliers who source handwoven textiles from various parts of the Philippines, many of which are further embellished by hand according to her specific designs.

As previously mentioned, Lumban is known for the calado technique, but it is also widely used in the Philippines. It is an intricate art form that demands mastery of diverse stitches, careful fabric selection, and precise techniques for delicate thread manipulation. It stands out as a craft both unique and exceptional. Each stitch in calado embroidery narrates a story, while every pattern showcases the nation’s soul and artistic expertise. The meticulous process of removing and re-weaving threads requires exceptional skill and attention to detail, highlighting the artisan’s mastery. These intricate steps, including delicate thread manipulation, are time-intensive, often spanning weeks or months to complete. For instance, crafting a single embroidery piece may necessitate up to six months, underscoring the dedication and skill essential to this art form.

In Taal, Batangas, embroidery offers various career opportunities, from independent artisans running their own shops to professionals creating intricate pieces for ceremonial use. Traditionally, both men and women have engaged in embroidery, with skilled artisans

working in commercial or official workshops, often under male supervision. These professionals undergo long apprenticeships and are typically regulated by craft guilds.

While some embroiders pursue needlework as a full-time profession, others treat it as a secondary occupation. To support their craft, business management seminars have been identified as an effective way to help embroiderers enhance their skills and expand their market reach.

In the global aspect, specifically in India, embroiderers must complete class 8 and must have at least 1 year of experience in embroidery in order for them to enroll in the National Skills Qualification Framework (NSQF)\* level 5 Master Hand Embroider (Hand Crafted Textiles). The required personal competencies include having an artistic bent of mind, having good eye-to-hand coordination, liking creating things, and having good communication skills.

Their places of work include Fashion Designers, Self Help Groups and NGOs retained by designers or fashion houses, and embroidery training centers. In terms of entrepreneurship, embroiderers can have their own setup and take orders for embroidery after a few years of experience.

The expected growth path starts with being a hand embroiderer, to a senior hand embroiderer, and to an entrepreneur OR embroidery designer.

Meanwhile, in the United Kingdom, professional embroiderers specialize in intricate stitching, using traditional techniques to create detailed designs on clothing, accessories, and home décor. They blend sewing skills with modern software to craft embellishments. In terms of employment, embroiderers may work for fashion brands, retailers, design firms, or as independent artists.

Key skills include sewing by hand and by machine, computer design, attention to detail, working well using hands, creativity and design flair, can work alone or in a team, and patience, and can remain calm under pressure. If the embroiderers deal with the public, they also need customer service skills. Those who design bespoke pieces need to be effective communicators to be able to explain creative ideas to customers. Self-employed embroiderers need business skills to market their products and services, deal with finances, and develop their business.

In order to become an embroiderer in the UK through universities, one can start by getting a degree in fashion or fashion and textiles, and specialize in hand embroidery during the course. There are also specialist degree courses available that require a foundation studies diploma in art and design 2 to 3 A levels for a degree. For the college pathway, aspiring embroiderers can take college courses, such as Level 2 Certificate in Fashion and Textiles and Level 3 Certificate in Fashion and Textiles, to develop their textile skills. Another pathway is through the apprenticeship scheme, wherein the range of available apprenticeships in different areas depends on the local job market.

### III. Value Chain

In the consultation with Patis Tesoro, it was noted that the value chain for the traditional embroidery done currently is as follows:

1. Design
2. Sourcing of Materials
3. Embroidery
  - a. Modern
  - b. Traditional
4. Marketing

On the other hand, when hand embroidery was conducted in the past, it began with the **magdidibuho** (designer), who stamped patterns onto the fabric. The **magbuburda** (embroiderer) then stitches these designs, while the **magkakalado** specializes in the cut-openwork section.

Three artisans assist in this delicate process:

- The **magbabakbak** pulls threads from the fabric.
- The **maglalala** weaves the remaining threads using embroidery stitches.
- The **magmumunggo** embroiders the gathered threads.

Sometimes, one person performs all three tasks.

Once the **calado** (open-work design) is complete, the fabric goes to the **magaagohero**, who embroiders the edges. The **maglalaba** then washes it, and the cloth is stretched on a wooden frame to dry under the sun. After drying, it is folded and delivered to the **cabecilla** for sale.

Other sources even state that different types of needlework were typically handled by separate artisans—one may focus on scallop embroidery, another on hemstitching, while others specialize in buttonholes or drawn thread work. This division of labor requires a well-organized system for distributing materials to each worker. Contractors and subcontractors managed this coordination to ensure a smooth workflow. Depending on the complexity, completing a single garment can take anywhere from 3 to 6 months, and in some cases, up to 9 to 12 months.

Given these value chain models, the jobs and skills involved in the embroidery industry are as follows:

Table 2. Job/Skill Requirements per Value Chain Component in the Traditional Embroidery Industry

Value Chain	Job/Skill Requirements	Description
Design	Magdidibuho (Designer)	Designs and stamps patterns onto fabric for embroidery

Sourcing of Materials	Supplier/Material Sourcing Specialist	Procures fabrics and materials, ensuring the availability of appropriate textiles for embroidery
Embroidery	Magbuburda (Embroiderer)	Stitches the designs onto fabric according to the stamped patterns
	Magkabalado (Specialist in Cut-Openwork Section)	Specializes in the intricate cut-openwork or calado design section of the embroidery
	Magbabakbak (Thread Puller)	Pulls threads from the fabric to create gaps for the calado design
	Maglalala (Thread Weaver)	Weaves the remaining threads using embroidery stitches to complete the calado
	Magmumunggo (Gathering Thread Embroiderer)	Embroiders the gathered threads to finish the calado pattern
	Magaagohero (Edge Embroiderer)	Embroiders the edges of the fabric once the calado is complete
	Maglalaba (Washer)	Washes the fabric to remove any residue before drying
	Drying and Folding Worker	Stretches the cloth on a wooden frame to dry under the sun and folds it once dried
Marketing	Cabecilla (Seller/Distributor)	Coordinates the sale of the completed garment, ensuring it reaches customers or markets
	Marketing/Sales Specialist	Promotes and sells the products, either through retail channels or online, creating awareness and demand

It should be noted once again that the Magbabakbak (Thread Puller), Maglalala (Thread Weaver), and the Magmumunggo (Gathering Thread Embroiderer) can be just one person.

The table below shows the mapping of the job/skills in each value chain component of traditional embroidery and their equivalent TVET program, if applicable.

Table 3. Mapping of the Traditional Embroidery Jobs/Skills and their Equivalent TVET Program

Value Chain	Job/Skill Requirements	Equivalent TVET Program
Design	Magdidibuho (Designer)	Fashion Design (Apparel) NC III
Sourcing of Materials	Supplier/Material Sourcing Specialist	No Equivalent TVET Program
Embroidery	Magbuburda (Embroiderer)	Hand Embroidery NC II
	Magkabalado (Specialist in Cut-Openwork Section)	No Equivalent TVET Program
	Magbabakbak (Thread Puller)	No Equivalent TVET Program
	Maglalala (Thread Weaver)	No Equivalent TVET Program
	Magmumunggo (Gathering Thread Embroiderer)	No Equivalent TVET Program
	Magaagohero (Edge Embroiderer)	No Equivalent TVET Program
	Maglalaba (Washer)	No Equivalent TVET Program
	Drying and Folding Worker	No Equivalent TVET Program
Marketing	Cabecilla (Seller/Distributor)	Salesmanship Level II
	Marketing/Sales Specialist	Hand Embroidery NC II
		Salesmanship Level II

Based on this mapping, there are no equivalent TVET programs that tackle the calado or the traditional style of embroidery. The existing TR on Hand Embroidery NC II does not specify the traditional technique taught, such as the calado, and makes use of the sewing machine to conduct the embroidery. However, there are elements in the TR that tackle competencies related to traditional embroidery, such as elements in conducting preparatory activities and performing embroidery. The TR also already contains competencies in marketing embroidered products, which addresses the marketing value chain component of traditional embroidery. With the traditional nature of this skill, it should also be noted that the TR contains a common competency on Enhance Creative and Artistic Skills and Cultural Awareness.

As for the Maglalaba (Washer) and Drying and Folding Worker, there are existing TRs that contain competencies on washing clothes/linen, such as Domestic Work NC II and Housekeeping NC II. However, the washing of the embroidered fabric might need a more specialized program due to the intricacies and possible fragility of the embroidery, depending on the finished work.

#### IV. TVET Capacity and Analysis

The following tables show data on the TVET capacity and infrastructure in the garment industry.

**Table 4. Number of Enrolled, Graduates, Assessed and Certified in Related Qualification, and by Year: CY 2022-2024**

*Data Source: Enrolled and Graduates - TESDA ICTO, Assessed and Certified - TESDA - Certification Office*

*Processed by: TESDA - Planning Office*

*Note/s: 1. The number of graduates have spillover from its previous year*

*2. The number of enrolled and graduates only includes With Training Regulation (WTR) only*

*3. The number of enrolled and graduates is as of December of each Year*

*4. The Salesmanship Level II was developed only on 2023, while the Hand Embroidery NC II was promulgated only last May 2024*

TESDA Sector	Training Qualification	2022				2023				2024			
		Enrolled	Graduates	Assessed	Certified	Enrolled	Graduates	Assessed	Certified	Enrolled	Graduates	Assessed	Certified
Garments	Dressmaking II	9,126	9,046	9,532	8,320	9,554	8,417	9,737	8,456	9,444	9,782	11,467	9,918
Garments	Fashion Design (Apparel) NC III	0	0	0	0	0	0	31	31	0	0	44	33
Garments	Tailoring II	529	578	700	535	666	602	625	509	601	684	946	828
Creative	Hand Embroidery NC II	0	0	0	0	0	0	0	0	0	0	0	0
Wholesale and Retail Trading	Salesmanship Level II	0	0			0	0			0	0	0	0
<b>Total</b>		<b>9,655</b>	<b>9,624</b>	<b>10,232</b>	<b>8,855</b>	<b>10,220</b>	<b>9,019</b>	<b>10,393</b>	<b>8,996</b>	<b>10,045</b>	<b>10,466</b>	<b>12,457</b>	<b>10,779</b>

**Table 5. Number of Enrolled and Graduates in Related Qualification, by Region, and by Year: CY 2022-2024**

Data Source: Enrolled and Graduates - TESDA ICTO

Processed by: TESDA - Planning Office

"Note/s: 1. The number of graduates have spillover from its previous year

2. The number of enrolled and graduates only includes With Training Regulation (WTR) only

3. The number of enrolled and graduates is as of December of each Year

Region	Training Qualification	2022		2023		2024	
		Enrolled	Graduates	Enrolled	Graduates	Enrolled	Graduates
Bangsamoro Autonomous Region In Muslim Mindanao (BARMM)	Dressmaking II	2,097	1,541	1,479	1,668	2,166	1,971
<b>Bangsamoro Autonomous Region In Muslim Mindanao (BARMM) Total</b>		<b>2,097</b>	<b>1,541</b>	<b>1,479</b>	<b>1,668</b>	<b>2,166</b>	<b>1,971</b>
Cordillera Administrative Region (CAR)	Dressmaking II	144	195	93	106	139	135
Cordillera Administrative Region (CAR)	Tailoring II	31	42	47	47	98	90
<b>Cordillera Administrative Region (CAR) Total</b>		<b>175</b>	<b>237</b>	<b>140</b>	<b>153</b>	<b>237</b>	<b>225</b>
National Capital Region (NCR)	Dressmaking II	476	283	666	381	530	573
National Capital Region (NCR)	Tailoring II	0	0	0	6	0	0
<b>National Capital Region (NCR) Total</b>		<b>476</b>	<b>283</b>	<b>666</b>	<b>387</b>	<b>530</b>	<b>573</b>
Negros Island Region	Dressmaking II	0	0	0	0	279	227
Negros Island Region	Tailoring II	0	0	0	0	25	25
<b>Negros Island Region Total</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>304</b>	<b>252</b>

Region	Training Qualification	2022		2023		2024	
		Enrolled	Graduates	Enrolled	Graduates	Enrolled	Graduates
<b>Region I - Ilocos</b>	<b>Dressmaking II</b>	<b>236</b>	<b>293</b>	<b>415</b>	<b>422</b>	<b>570</b>	<b>637</b>
<b>Region I - Ilocos Total</b>		<b>236</b>	<b>293</b>	<b>415</b>	<b>422</b>	<b>570</b>	<b>637</b>
Region II - Cagayan Valley	Dressmaking II	492	550	597	547	604	482
Region II - Cagayan Valley	Tailoring II	11	35	132	101	85	68
<b>Region II - Cagayan Valley Total</b>		<b>503</b>	<b>585</b>	<b>729</b>	<b>648</b>	<b>689</b>	<b>550</b>
Region III - Central Luzon	Dressmaking II	902	1,081	1,024	846	928	1,175
Region III - Central Luzon	Tailoring II	25	50	43	0	89	126
<b>Region III - Central Luzon Total</b>		<b>927</b>	<b>1,131</b>	<b>1,067</b>	<b>846</b>	<b>1,017</b>	<b>1,301</b>
Region IVA - CALABARZON	Dressmaking II	390	465	419	421	312	373
<b>Region IVA - CALABARZON Total</b>		<b>390</b>	<b>465</b>	<b>419</b>	<b>421</b>	<b>312</b>	<b>373</b>
Region IVB - MIMAROPA	Dressmaking II	168	139	50	70	187	179
<b>Region IVB - MIMAROPA Total</b>		<b>168</b>	<b>139</b>	<b>50</b>	<b>70</b>	<b>187</b>	<b>179</b>
Region IX - Zamboanga Peninsula	Dressmaking II	577	657	451	398	583	613
Region IX - Zamboanga Peninsula	Tailoring II	74	50	0	0	43	40
<b>Region IX - Zamboanga Peninsula Total</b>		<b>651</b>	<b>707</b>	<b>451</b>	<b>398</b>	<b>626</b>	<b>653</b>
Region V - Bicol	Dressmaking II	715	646	859	668	853	724
Region V - Bicol	Tailoring II	258	256	129	142	93	136

Region	Training Qualification	2022		2023		2024	
		Enrolled	Graduates	Enrolled	Graduates	Enrolled	Graduates
<b>Region V - Bicol Total</b>		<b>973</b>	<b>902</b>	<b>988</b>	<b>810</b>	<b>946</b>	<b>860</b>
Region VI - Western Visayas	Dressmaking II	306	304	403	388	254	335
Region VI - Western Visayas	Tailoring II	25	25	156	138	25	23
<b>Region VI - Western Visayas Total</b>		<b>331</b>	<b>329</b>	<b>559</b>	<b>526</b>	<b>279</b>	<b>358</b>
Region VII - Central Visayas	Dressmaking II	795	835	823	800	600	846
Region VII - Central Visayas	Tailoring II	65	90	69	68	14	14
<b>Region VII - Central Visayas Total</b>		<b>860</b>	<b>925</b>	<b>892</b>	<b>868</b>	<b>614</b>	<b>860</b>
Region VIII - Eastern Visayas	Dressmaking II	326	366	829	612	433	403
<b>Region VIII - Eastern Visayas Total</b>		<b>326</b>	<b>366</b>	<b>829</b>	<b>612</b>	<b>433</b>	<b>403</b>
Region X - Northern Mindanao	Dressmaking II	467	486	437	326	475	455
Region X - Northern Mindanao	Tailoring II	40	30	50	60	0	0
<b>Region X - Northern Mindanao Total</b>		<b>507</b>	<b>516</b>	<b>487</b>	<b>386</b>	<b>475</b>	<b>455</b>
Region XI - Davao	Dressmaking II	637	717	657	397	228	370
Region XI - Davao	Tailoring II	0	0	0	0	87	125
<b>Region XI - Davao Total</b>		<b>637</b>	<b>717</b>	<b>657</b>	<b>397</b>	<b>315</b>	<b>495</b>
Region XII - SOCCSKSARGEN	Dressmaking II	328	403	307	330	249	245
Region XII - SOCCSKSARGEN	Tailoring II	0	0	25	25	26	24

Region	Training Qualification	2022		2023		2024	
		Enrolled	Graduates	Enrolled	Graduates	Enrolled	Graduates
<b>Region XII - SOCCSKSARGEN Total</b>		<b>328</b>	<b>403</b>	<b>332</b>	<b>355</b>	<b>275</b>	<b>269</b>
Region XIII - CARAGA	Dressmaking II	70	85	45	37	54	39
Region XIII - CARAGA	Tailoring II	0	0	15	15	16	13
<b>Region XIII - CARAGA Total</b>		<b>70</b>	<b>85</b>	<b>60</b>	<b>52</b>	<b>70</b>	<b>52</b>
<b>Grand Total</b>		<b>9,655</b>	<b>9,624</b>	<b>10,220</b>	<b>9,019</b>	<b>10,045</b>	<b>10,466</b>

The TVET infrastructure is provided as well due to its impact on the efficiency of the TVET Capacity for the identified existing TVET programs.

**Table 6. Number of Registered Programs, Trainers, Assessment Centers, and Competency Assessors in the Garments Sector, and by Qualification: As of December 2024**

*Data Source: TESDA - Certification Office*

*Processed by: TESDA - Planning Office*

*Note/s: 1. The number of Registered Programs, NTTC Holders, Assessment Centers, and Competency Assessors are counted by Qualification*

TESDA Sector	Training Qualification	Registered Programs	Trainers	Assessment Centers	Competency Assessors
Garments	Dressmaking NC II	203	712	128	231
Garments	Fashion Design (Apparel) NC III	2	15	5	9
Garments	Tailoring NC II	40	131	33	41
Creative	Hand Embroidery NC II	0	0	0	0

Wholesale and Retail Trading	Salesmanship Level II	0	0		
<b>Total</b>		<b>245</b>	<b>858</b>	<b>166</b>	<b>281</b>

**Table 7. List of Area-Based and Demand Driven (ABDD) TVET Identified Skills Requirements for Embroidery by Region, by Province and by Sector**

*Data Source: R/PTESD Plan Action Programming (Main Reference): 2024-2026*

*Note/s: The data is updated by the regions as of March 2025*

Region	Province	Sector	Job/Skills Requirements	Identified Corresponding TVET Program
REGION IX	ZAMBOANGA DEL SUR	CREATIVE	EMBROIDER	EMBROIDERY LEVEL II
REGION XI	DAVAO DEL NORTE	GARMENTS	EMBROIDER	EMBROIDERY LEVEL II
REGION IV-B	MARINDUQUE	TOURISM (HOTEL AND RESTAURANT)	• ART AND CRAFTS -HANDICRAFT MAKER (FOR SOUVENIRS) DESIGNER	EMBROIDERY LEVEL II

**Table 8. List of Area-Based and Demand Driven (ABDD) TVET Identified Skills Requirements for Embroidery by Region, by Province and by Sector**

*Data Source: Granularized Area-Based and Demand Driven (ABDD) TVET*

*Note/s: The data is as of March 2025*

Region	Province	Sector	Job/Skills Requirements	Identified Corresponding TVET Program
REGION_I	LA UNION	GARMENTS	DRESSMAKER	EMBROIDERY LEVEL II
REGION_IVB	OCCIDENTAL MINDORO	CREATIVE SECTOR	ARTISAN, CRAFT ARTIST	HAND EMBROIDERY NC II

REGION_III	BATAAN	MANUFACTURING	EMBROIDERY OPERATOR	NO CORRESPONDING TVET PROGRAM
REGION_VI	AKLAN	GARMENTS	EMBROIDERY	EMBROIDERY LEVEL II
REGION_VI	AKLAN	CREATIVE SECTOR	HAND STRIPPING	HAND EMBROIDERY NC II
REGION_VI	AKLAN	CREATIVE SECTOR	KNOTTING	HAND EMBROIDERY NC II
REGION_VIII	SAMAR	CREATIVE SECTOR	DESIGNING, EMBROIDERY AND ASSEMBLING OF MAT PRODUCTS	NO CORRESPONDING TVET PROGRAM
REGION_IX	ZAMBOANGA DEL SUR	CREATIVE SECTOR	EMBROIDER	EMBROIDERY LEVEL II
CARAGA	AGUSAN DEL SUR	CREATIVE SECTOR	SUYAM EMBROIDERER	EMBROIDERY LEVEL II

Based on the data provided on both the TVET capacity and infrastructure, it can be seen that there is a significant absence of infrastructure on Hand Embroidery NC II, leading to no output at all. Analyzing this vis-a-vis the data from the area-based demand-driven (ABDD) TVET, it is evident that there is a rising demand for jobs and skills on embroidery from different regions in the Philippines, notably from those that are known for embroidery, such as Region 6 (Aklan) and 11 (Davao del Norte). Another observation is the requirement of the CARAGA Region, Agusan del Sur for Suyam Embroiderer. Suyam is a traditional embroidery style that features a variety of geometrical designs. Like the calado, suyam has cultural significance and contributions. It is also worth noting how most of the embroidery requirements are classified under the Creative Sector, signifying that this traditional craft is not only a form of livelihood but also a vital expression of Filipino culture, identity, and innovation within the growing creative economy.

On the other hand, there is a noticeable lack of requirement for embroiderers from Region 4A where Lumban and even Taal are located. This may be due to the predominance of informal, home-based, and project-based work that is not captured in regional and provincial skills mapping. Also, many artisans work directly with clients or through family-run enterprises, reducing the visibility of job postings and formal employment records.

In terms of other programs in the garments sector, such as Dressmaking NC II, Fashion Design (Apparel) NC III, and Tailoring NC II, the presented data show that there are existing TVET infrastructure and trained and certified individuals who can potentially be upskilled or cross-trained to specialize in traditional embroidery, thereby bridging the current gap in formal training for Hand Embroidery NC II.

## V. Conclusion and Recommendations

The Philippine embroidery tradition—particularly the high-art, heritage-informed style of artisans like Patis Tesoro—represents not only a rich cultural legacy but also an underutilized economic and creative opportunity. Characterized by intricate hand techniques, fine indigenous textiles, and couture-level finishing, this form of embroidery aligns well with PSIC Division 74: Other Professional, Scientific, and Technical Activities, which justifies its classification as a specialized and higher-order skill.

Despite this potential, the current TVET landscape reveals substantial gaps. There is a shortage of qualified trainers, a lack of infrastructure to support master-level craft training, and limited integration of learner-centered, project-based methodologies that are essential in teaching artisanal and creative professions. Furthermore, the market for traditional embroidery faces challenges related to high production costs, limited local demand, and the risk of cultural appropriation through mass-market replication.

Yet, opportunities abound. With global trends moving toward slow fashion, cultural sustainability, and heritage preservation, Philippine embroidery can be positioned as a premium, globally competitive niche, provided that training and workforce development systems are realigned to meet industry demands and preserve cultural authenticity. This also underscores the broader need to safeguard and invest in traditional cultural skills and practices—not only as forms of artistic expression, but as viable livelihood pathways that contribute to inclusive growth, national identity, and the creative economy.

With this, an urgent need arises and is thus recommended to formally recognize and institutionalize traditional cultural skills and practices, such as weaving, carving, embroidery, and other heritage crafts, as critical components of national identity, creative industry development, and inclusive economic growth. These crafts, often passed down through generations, are at risk of being lost due to waning interest among the youth, limited training pathways, and lack of formal recognition in national skills systems.

Specifically on the topic of traditional embroidery, TESDA is recommended to undertake the following actions:

1. Develop and Institutionalize a Masterclass Program in Traditional Embroidery
  - a. Anchor the program in the styles and techniques pioneered by heritage artisans like Patis Tesoro.
  - b. Include modules on heritage fabric handling (piña, jusi), haute couture finishing, design innovation, and storytelling through textiles.
  - c. Ensure the program is competency-based and includes an apprenticeship component under accredited master embroiderers.
  - d. Development of a competency standard on traditional embroidery, both for master trainers and potential workers, which will later serve as a reference for the development of a full-blown training regulation.
2. Apply Learner-Centered Approaches as Validated by SfP-Philippines
  - a. Integrate the “learning by doing” approach, where trainees engage in real product development tasks under the guidance of master trainers.

- b. Adopt methodologies that promote motivation, relevance, and transition-to-work, aligning with CEDEFOP-backed findings that show improved outcomes through learner-centered practices.
- 3. Create a National Registry and Capacity-Building Program for Master Trainers in collaboration with the National Commission for Culture and the Arts (NCCA)
  - a. Review and/or develop guidelines recognizing heritage artisans as trainers and assessors.
  - b. Identify artisans with heritage embroidery expertise and formalize them as trainers and assessors.
  - c. Provide upskilling programs on instructional design, learner-centered pedagogy, and entrepreneurship.
- 4. Establish a Center of Excellence for Filipino Heritage Embroidery and Textile Arts in collaboration with NCCA, the Philippine Textile Research Institute (PTRI) of the DOST, the Department of Trade and Industry (DTI), and the Department of Tourism
  - a. Located in cultural heritage hubs (e.g., Lumban, Taal), the center would serve as both a training facility and a product innovation incubator.
  - b. Offer national certifications, exhibitions, and residencies to attract both learners and fashion entrepreneurs.
  - c. Collaborate on the applied research and development for the textile industry sector and subsequent transfer of completed research, and delivery of corresponding training programs.
- 5. Promote Cross-Sector Partnerships in the Creative Economy
  - a. Collaborate with design schools, fashion collectives, export agencies, and tourism boards to expand job opportunities.
  - b. Support graduates through access to markets, trade events, and online platforms to sustain employment and entrepreneurship.
  - c. Implement Enterprise-Based Education and Training (EBET) to emphasize experiential learning, industry immersion, and foster entrepreneurship among trainees in the creative sector.
- 6. Strengthen the Infrastructure for Embroidery and Related TVET Programs
  - a. Map out training centers, facilities, equipment availability, and trainer qualifications.
  - b. Use findings to guide targeted investments in specialized embroidery labs, material libraries, and digital design tools.

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**Office of the Deputy Director General for Policies and Planning**  
Planning Office - Labor Market Information Division

TESDA Complex, East Service Road, South Superhighway, Taguig City, 1630  
[www.tesda.gov.ph](http://www.tesda.gov.ph) | (02) 8817-2675

**Contributors:**

Hannah Louise G. Legaspi  
Yancy D. Tolentino  
Michael William H. Del Rosario  
AED Katherine Amor A. Zarsadias