7 UNITED KINGDOM

7.1 GENERAL ECONOMIC SITUATION

The growth rates of the Gross Domestic Product (GDP) in the UK have been higher in the 90s than in the rest of the EU, and the UK can be described as a booming" country. Development is comparable to that of the US. This must also to be seen against the backdrop of the UK´s painful restructuring process the decades before, that rendered obviously successful results in the end. Since 1995 the GDP growth rate has been constant on average 2.8%. This is more than in most of the other European countries.

The total expenditures of private households in the UK continuously increased in the last few years at constant price levels by 4% with 594,782 million £ in 2000 (Office of National Statistics- average 4 person household). The reason for this positive development is that the unemployment rate among the population has been very low: 2.1% in 2000 and in 2001. This performance is excellent compared to the double digit unemployment rates in other European countries. The UK is one of the three largest countries in the European Union, but has not entered the EU Monetary Union yet. Especially since the introduction of the € at beginning of 2002, the imports of clothing (and other goods) to the UK have been positively influenced by the strong position of the British £ against the €.

7.2 THE MARKET FOR OUTERWEAR

7.2.1 Market size

The UK is the second biggest market for clothing including outerwear in the EU after Germany. The total market continuously increased over the last years, demonstrating development opposite that of most of the countries analysed for this market survey.

Looking at the British women's wear market in 2000, it shrank temporarily by 12.9%, mainly due to the rapidly reduced local production, that went down to 3.01 billion £ (21%). A principal reason for this development is the changed sourcing strategy of Marks & Spencer where old ties were cut with local producers. Imports could not compensate for the dramatically reduced local production. Within a couple of months, even the total sales were affected. However, as interviews have proved, the year 2001 has been a good year again.

Imports have gained importance for the British ladies' wear market. As Table 7–1 indicates, the year 2000 was the key year for new suppliers from abroad with historically high imports of 6.95 billion £ (+7.6%) compared to 1999. While in 1997 the imports were as strong as the local production, only three years later the imports were more than doubly as high as the women's wear sourced from local producers. A similar development can be observed also for the men's wear market as can be seen on Table 7–2.

Table 7-1: Size of the British womenswear market, 1997–2000

in bn. £*	1997	1998	1999	2000	+/– from previous year
Import Market	5,84	5,76	6,46	6,95	+7,6%
Local Production	5,25	5,23	4,49	3,01	–21,0%
Exports	2,31	2,10	1,77	1,96	+10,7%
Total Market	**8,78**	**8,89**	**9,18**	**8,00**	**–12,9%**

Source: BATC, Overseas Trade Statistics
* 1.1.2002: 1£ = 1.61 Euro

The importance of the men's wear market has increased in the last few years. In 2000, growth is expressed in a plus of 6.2% with a total sales volume of billion 6.48 £, although the local UK production of men's wear decreased in the same period. Simultaneously, in 2000 the import of men's wear significantly increased by 10.7%.

In 2001 and 2002 the tendency of increasing imports has continued, and offers comparatively good sales opportunities for men's and ladies outerwear manufacturers wishing to increase sales in the British market. Exports of British men's wear has been decreasing over the last 4–5 years, whereas British ladies' wear exports have increased in 2000 for the first time since 1999. Nevertheless, specific figures for the outerwear market are not available. However, based on the research for this study, the developments for the outerwear market can generally be derived from the situation in the clothing market.

Table 7-2: Size of the British menswear market, 1997–2000

in billion £*	1997	1998	1999	2000	+/– from previous year
Import Market	4.25	4.49	4.78	5.29	+10.7%
Local Production	3.72	3.29	3.10	2.85	–8.1%
Exports	2.03	1.89	1.78	1.66	–6.7%
Total Market	**5.94**	**5.89**	**6.10**	**6.48**	**+6.2%**

Source: BATC, Overseas Trade Statistics
* 1.1.2002: 1£ = 1.61 Euro

7.2.2 Market characteristics

Based on desk-research and interviews, it can be stated that large parts of British consumers are very price sensitive. However, some consumers are also willing to buy higher priced and exclusive clothing. The good economic development in the UK in the past few years has led to an increase of the consumer segment with more purchasing power, e.g. the number of millionaires increased from 6,000 in the year 1990 to 47,000 in 2001. The tendency towards luxury is also emphasized by the strong brand awareness. In 2001, the average income of the British population increased by +4.2%, also due to a low inflation rate of 0.7%. TNS Fashion Trak observes that higher priced items had the best growth rates in sales in 2001. The 'luxury segment' (upper 20% of the most expensive garments sold in the market) grew by 9% in terms of sales amounts in the first half of 2001 in comparison to the same period in 2000. Most consumers with high income are normally in the age group between 50 and 60 and manufacturers offering highest quality garments meet a strong and ever growing market segment in the UK.

Good quality is also of increasingly relevance to the younger consumers. This is underlined by the fact that clothing brands are of same importance to the young as to elderly consumers, although the younger consumers often can not afford the branded items. Whenever their financial situation allows (often due to the wealth of their parents) the young like to buy brands (e.g. for jeans) and are eager to show their fashion awareness.

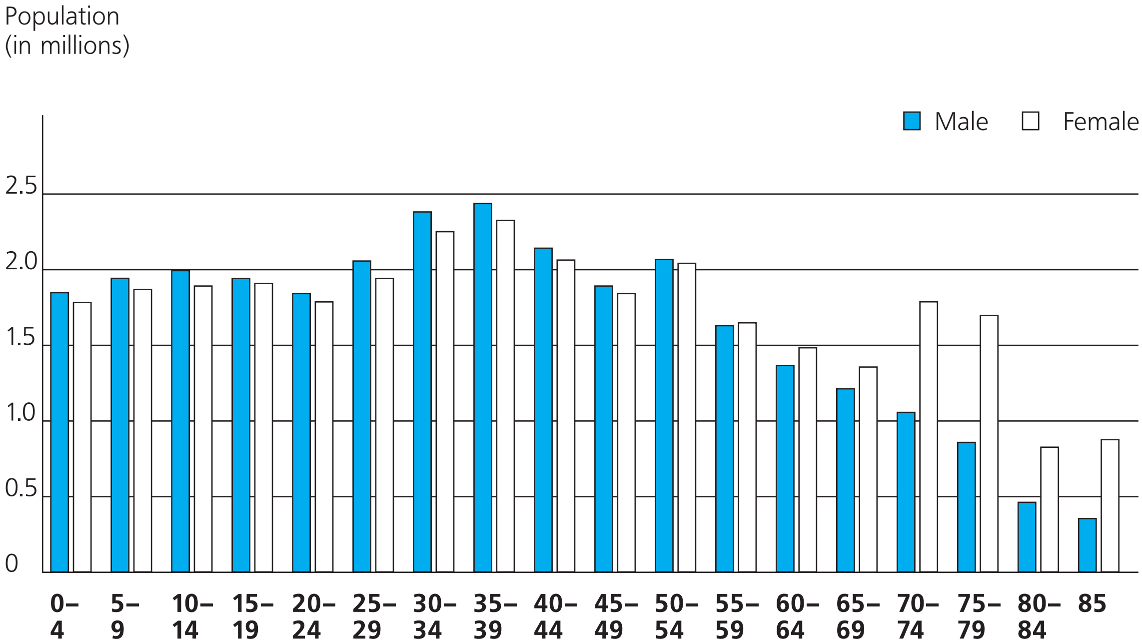
7.2.3 Demographic characteristics

The UK has a population of 59.5 million with only very slight increases in population projected for the next 10 years. The age structure indicates the most suitable consumer groups to address for the respective product segment. Market developments in terms of shifts in the age groups can be predicted. These demographic forecasts may give hints on how to address the age group concerning design and marketing. Also, the kinds of clothing requested may change in the future regarding general demand, quality, suitability, comfort standards, basic designs and colours.

The age groups between 30 and 39 have the highest shares in the British population today with 7.9% (30–34) and 8.1% (35–39) of total population. But the older age groups of 40 to 54 play also a significant role. In the future, the younger consumer segment will decrease more and more. The tendency of falling birth rates in the UK is a constant factor with direct effects on the age and therefore consumption structure of the population.

Manufacturers from abroad should not neglect the increasing 'age group' of > 35 up to 54 years of age. More details about the shares and developments of the age groups concerned can be taken from Figure 7–1.

Figure 7-1: Age structure of the British population by sex, 2000



Source: U.S. Bureau of the Census, International Data Base

Table 7–3 indicates the shares of the specific age groups in the total British population in 2000.

Table 7-3 : Age structure of the British population in shares, 2000

Age	0-4	5-9	10-14	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69
%	6.0	6.5	6.6	6.2	5.9	6.8	7.9	8.1	7.0	6.3	6.8	5.5	4.8	4.3

Age	70-74	75-79	80-84	85+
%	3.9	3.4	2.1	1.9

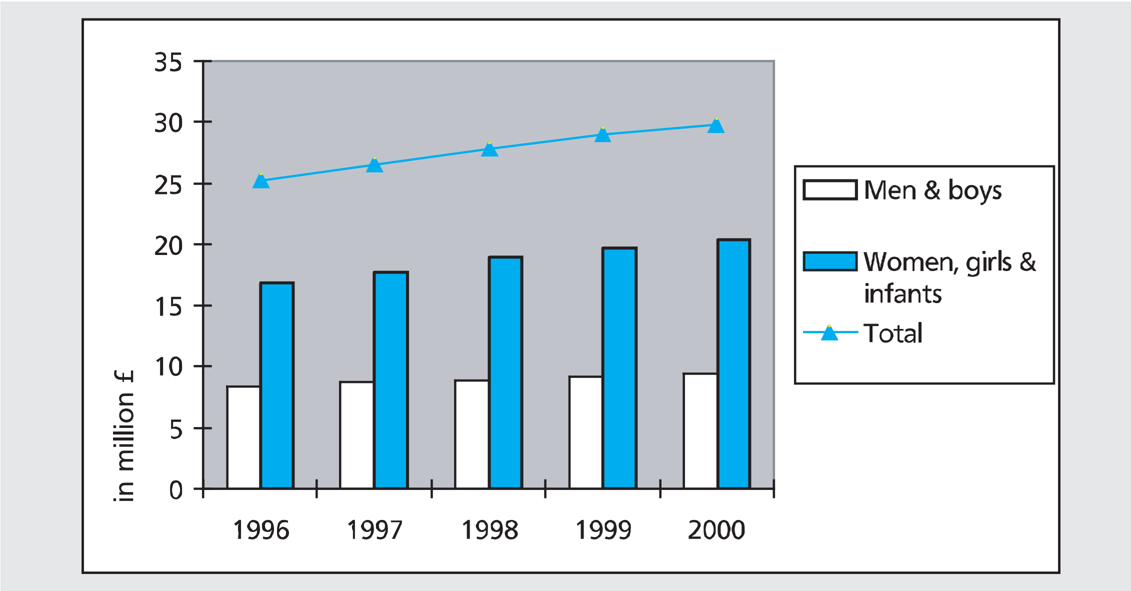
Source: U.S. Bureau of the Census, International Data Base.

7.2.4 Retail Sales by product category

The British market for outerwear shows significant differences between the segments of women's and men's wear. Whereas women's wear includes around 50% of outerwear, men's wear includes 81% of outerwear, mainly due to lower sales of underwear and accessories for men.

Figure 7-2: Clothing turnover by sex, 1996–2000

As indicated in Figure 7–2 the retail sales of clothing in the UK amounted to a total of app. 29.800 million £ (blue line in the graph) in 2000. The total clothing retail sales have risen on average yearly by 4.3% from £ 25.2 billion since 1996 to £ 29.8 billion in 2000.



Source: ONS Consumer Trends 2001

The market for women and girl's wear represents 68% of the total market and is therefore the larger sector for outer-wear.

The men's and boy's wear market stands for 32% of the British clothing market.

According to interviews made with importers in the UK, the men's wear market in 2001 and the first half of 2002 has picked up again. However, the sales for men's wear have been dominated by fierce price competition in the last few years.

Table 7-4: Shares of outerwear by sex, 2001

in % of total value	Men	Women
Formal Clothing	42	44
Coats	8	6
Suits/jackets	17	11
Trousers	9	4
Dresses/skirts	–	19
Shirts/blouses	8	4
Basic leisure wear	22	20
T-shirts	6	4
Tops/bodies	–	7
Shorts	1	1
Jeans trousers	9	4

in % of total value	Men	Women
Casual wear	30	31
Outdoor jackets	10	10
Shirts	6	5
Jumpers/cardigans	–	10
Pullovers	6	–
Trousers	8	6
Active sports wear	7	5
Track/jogging suits	4	2
Tops and shorts	1	1
Other	2	2
Sweaters/fleeces	6	4

Source: CBI Market Survey Outerwear 2001

Although formal wear is more and more substituted by casual wear like in other European countries, the UK is still the country with the highest market share of formal wear. As Table 7–4 shows, the share of formal clothing is at a comparatively high level of 44% for women and 42% for men. In this context, it should also be mentioned that in the segment of children's clothing formal wear is also strong because of the use of school uniforms in Great Britain. This has great after effects on the adult population. Dresses and skirts (19%) and formal jackets (11%) for women, and coats and shirts (8% each) for men are the product groups to be highlighted for the UK in comparison to other European countries. Casual wear and especially basic leisure wear have – compared to other European countries – lesser but increasing importance among the British consumers. According to the interviews conducted, designer (i.e. branded) casual clothing has become more and more popular. The most preferred clothing items are outdoor jackets (10% each) for men and women as well as trousers (8%) for men and cardigans/jumpers for women (10%).

7.2.5 Consumer behaviour

7.2.5.1 Consumer preferences

As can be seen from Table 7–5 multiple clothing chains and variety stores took 44.3% of womenswear and 34.5% of menswear sales by value in 2001.
Department stores and mail order operators each represented 10% of womenswear and approx. 8% of menswear value sales in 2001, which corresponds to around 7% and 6% by volume respectively. The mail order sector has held share as some multiple operators have entered the catalogue market.
Sports shops took some 3.6% of womenswear value sales in 2001; they are much less significant than in menswear, where they accounted for some 15% of sales.
Supermarkets have also become important womenswear outlets, taking an 11% share of sales by volume, but

accounting for only 3% by value. The reason here for this is that a high proportion of sales are of lower cost underwear and hosiery rather than outerwear.

Independents commonly sell upmarket branded clothing at higher price or more expensive own brands. In 2001, these outlets represented 8.5% of womenswear and 13.9% of menswear sales by value, for less than 5% and 7% in volume terms respectively.

Table 7-5: Market shares of clothing retail channels by sex, 2001

	Women		Men	
	% value	% volume	% value	% volume
National multiples	25.8	17.7	20.8	16.6
Variety stores	18.5	21.2	13.7	17.6
Department stores	10.9	6.9	8.9	6.8
Mail order	10.1	7.0	7.4	5.3
“Value” retailers	8.7	19.1	4.6	12.8
Independents	8.5	4.7	13.9	6.8
Sports Shops	3.6	1.9	15.1	9.6
Supermarkets	3.0	10.8	2.7	7.1
Market Stalls	1.6	2.9	1.6	4.9
Other	9.8	7.8	11.3	12.5
Total	100.0	100.0	100.0	100.0

Source: Taylor Nelson Sofres Fashion Trak, London

According to a research by the renowned ‘Taylor Nelson Sofres’ company, jeans and tracksuits are the most desired outerwear items. As in most of the other European markets, denim products had a ‘boom’ with an increase of more than 50% in the last 2–3 years, especially in the ladies outerwear market. Jeans can be taken as an example: They are not only fringed, but also marbled, “moustached”, sandblasted, destroyed, stonewashed etc. Kid’s jeans have been the most desired product in 2001 and 2002 – even at currently rising prices.

For children’s wear easy-to-wear-and-wash styles are in favour – wherever possible made out of cotton. Besides an increased demand for jersey tops, sweatshirts and other casual tops for girls, the sales development of trousers is as strong as in the jeans sector. For boys it can be assumed that the trend for sweatshirts and jogging bottoms will continue in the years to come.

Active sportswear has been in strong demand in the last 2–3 years, and clothing experts have underlined that this trend will last for another 3-4 years. (at least for those items with a sporty appeal which are especially preferred by teenagers.) However, interviews conducted indicate that brand awareness plays an important role and is focused not really on sport brands like Nike, Adidas, Reebok, but more on brands in general.

The trend to more casual clothing has implied a higher consumption in recent years and experts suppose that this general trend will continue at least until

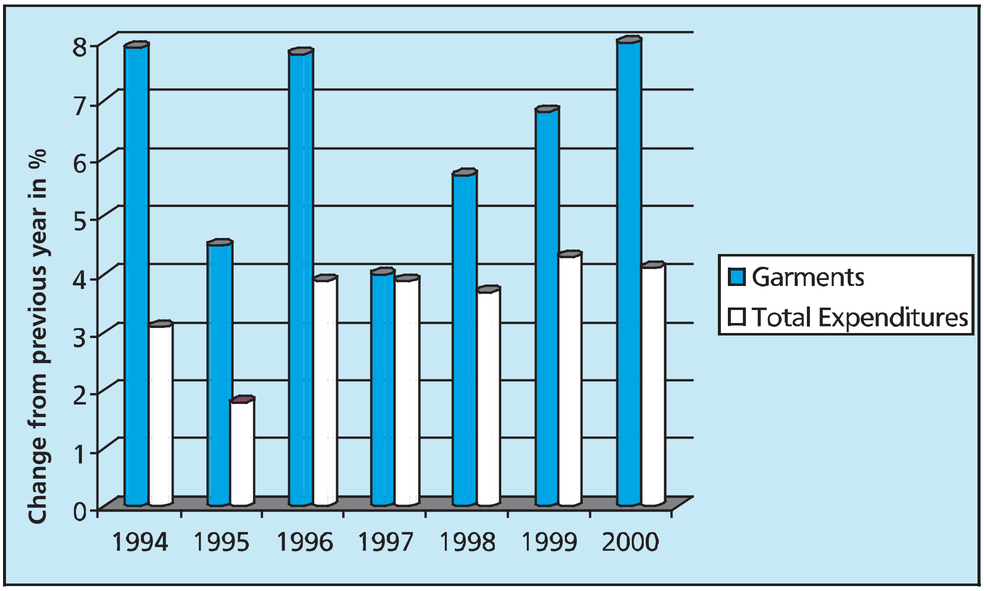
2004/2005. The increased ‘fashion awareness’ of the British men is visible all over, e.g.; as a consequence there is a growth for men style magazines in giving more space for fashion issues. A further development is the branded ‘smart casual clothing’ having replaced suits for work to a certain extent. This trend can be observed all over Europe and is generally positive for manufacturers from abroad offering casual wear, especially polo shirts, jeans, cotton shirts and trousers. Although casual clothing is cheaper than formal wear, men do not buy less but spend even more as they buy more items with a preference for branded items.

7.2.5.2 Consumer expenditures

In comparison to other European countries, the share of clothing expenditures compared to the total consumption continuously climbed since the mid 90´s. The per capita consumption for clothing in the UK today ranks in the middle within the EU. Demographic figures support the thesis that outerwear expenditures will grow also in the near future. In 2000 the expenditures on clothing increased at constant prices over that in 1995 by 8.0% compared to a rise in total expenditures by 4.1%. More details about the developments from 1994 to 2000 can be taken from Figure 7–3.

Figure 7.3: Change of percentage of consumer expenditure on clothing and total household expenditures, 1994–2000

Figure 7-3: Comparison of household expenditure on clothing and total household expenditure, 1994–2000



Source: Office of National Statistics (ONS): Consumer Trends – seasonally adjusted – at constant prices of 1995 (Basis: average 4 persons household)

The 'record results' of the first three quarters in 2001 show a total increase in clothing consumption in 2001 at a historical level of +10% (at constant prices of 1995). Only the side effects of the terror attacks in the US in September 2001 have slightly decreased the consumers confidence in the last quarter of 2001. The good sales are also astonishing because of the problems with foot and mouth disease at the beginning of 2001, and less tourists shoppers in UK. The total consumer expenditures for clothing was 9.4 Million £ in 2000 for men and 20.4 Million £ for women (Taylor Nelson Sofres Fashion Trak).

Table 7–6 illustrates the household expenditures by age of head per household. The figures indicate that for men expenditures on clothing rise with age, but seem to be quite constant especially for 30 to 64 year old men and only fall again at a higher age. The expenditures for women's outerwear are not only higher in all age categories than for men, but also show a different life cycle pattern. In the time span of 20 years between the age of 30 and 49 the average weekly expenditures are £ 8.4. In the time span of only 15 life years of 50 to 64 years women expenditures show exactly the same level of 8.4 £ weekly. Assuming that the age of the head of household stands for the age of the female consumer it means that the 50 to 64 year old women is the age category with the highest expenditures for clothing. It can be assumed that the reason for this could be sales of luxury items for the wealthy clientele in shops like Burberry's, Barbour and Pringle.

Table 7-6: Weekly household expenditure by age of head of household, 2000

in £	Under 30	30–49	50–64	65–74	75+	Total	Percentage
Men's outerwear	5.20	6.00	4.40	2.70	1.00	4.50	32.6%
Women's outerwear	7.30	8.40	8.40	5.10	2.60	7.10	51.5%
Boys' outerwear	0.30	1.50	0.40	0.10	0.10	0.70	5.1%
Girls' outerwear	0.20	1.90	0.50	0.40	–	0.90	6.5%
Babies' outerwear	1.10	0.90	0.30	0.30	0.10	0.60	4.3%

Source: ONS Family Spending 2000 – based on weighted data and including children's expenditure

The expenditures for boys and girls clothing is highest in households where the head of household is between 30–49 years old. The numbers show that babies outerwear is bought mostly by younger families or single parents under 30 years old. The spending of households on clothing for the young and very young consumers (boys, girls and babies) represent only 15.9% of the total household budget for clothing.

The 'International Data Base Study' of the U.S. Bureau of Census predicts positive demographic effects on total consumer expenditures (incl. clothing) for another twenty years considering that the group with the main expenditure for women is between 50 and 64 years. These demographic effects have to be considered by the clothing manufacturers wishing to penetrate the British market e.g. in terms of styling and designing for the 'elder consumers', who are already spending relatively more for clothing and will increase spending in the future.

UK has been a price-oriented market in the past, but continues to be more and more of a market with consumers valuing quality. Sales 'difficulties' in the middle market segment are probably more of a management problem – e.g. at Marks & Spencer which has had serious marketing and sales problems in the last 2–3 years – than a general consumer trend.

The main factor in buying decisions of British consumers is the disposable income, which has continuously increased in recent years. Retailers with the appropriate marketing concept have shared in this positive development. As a consequence of the booming economy compared to other markets people are willing to spend more on higher priced items. On average, around 6% of total household expenditures are on clothing (ONS, Family Spending Survey) independent from total expenditures in the respective income classes. It can be concluded that the percentage of expenditures on clothing from total income is stable throughout all income classes.

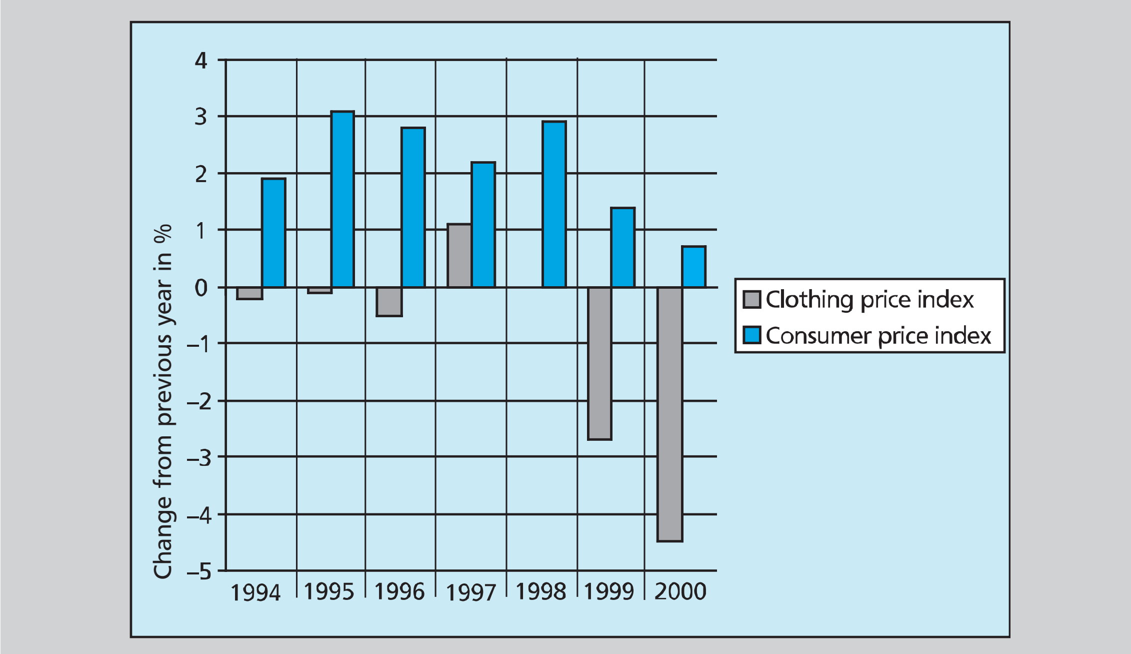
7.2.6 Price development of clothing

The general consumer prices of clothing have been declining since the mid nineties. The fierce price competition on the British clothing market has brought down prices for clothing year after year. In most outerwear sectors consumers buy more items, but the growth of the clothing market in value is lower due to price deflation.

The national statistics of ONS give a clear picture of the situation. Especially in the last three years from 1999 to 2001, the prices for clothing went down in the UK while the overall prices of consumer goods rose on average. In 2000 the general price inflation on consumer goods is indicated with +0.7%. However, the prices for garments have fallen and is represented by –4.5%. The figures for the first three quarters of the year 2001 indicate that this price decrease was not an exception. There was a total price inflation for 2001 of around +1.2%. The garment sector developed similar to the previous year, repeating deflation at a consumer price level, estimates based on the figures for the first three quarters. More details can be taken from Figure 7–4.

Figure 7-4: Price deflation of garments and price inflation for total expenditures (in %), 1994–2000

Figure 7-4: Inflation rate of clothing relative to national inflation rate, 1994–2000



Source: Office of National Statistics (ONS): Consumer Trends – deflators
* in 1998 the price deflation for clothing was 0.0%

7.3 IMPORTS

7.3.1 Total imports

While UK production has decreased, the imports of clothing increased in recent years. The strength of the British Pound has been given as the main motivation by the importers interviewed as to why the imports have been so attractive. As a logical consequence, the 'Overseas Trade Statistics' show that imports for ladies and men's clothing continuously increased over the last few years. Although the import level of women's wear is higher than for men's wear, imports of men's clothing seem to have grown stronger.

Looking at the total figures in Table 7–7 and Table 7–8 the import share of women's clothing in total imports is higher than that for men mainly due to a general higher consumption of women's clothing. The national clothing production companies have been reducing their output year after year and the imports are not only replacing the domestic, but there are also - with a tendency of lower prices - more clothing items sold in the UK than ever before. In terms of value, the UK is the second largest importer of outerwear within the EU. The UK imports amounted approx. 16% of total clothing imports to the European Union.
Table 7-7 illustrates the import developments of knitted outerwear from 1999 to 2001 for those outerwear items analysed for this marketing handbook. Although the consumption of women's wear is higher than that of men's wear the import figures show that the import of knitted outerwear (coats, suits, shirts/blouses) for men with 612.6 million € is nearly as high as for women with 689.8 million €. It should be noted that the imports of knitted outerwear for women and girls have decreased from

2000 to 2001 by 8%. The highest import increase for a specific product segment can be stated for 'Other Sportswear' with a plus of 21 % in 2001 compared to 2000 (HS Code 61.14).

The total import of knitted products increased in terms of value from 1999 to 2001 by 20.8%. The percentage of knitted outerwear imported from countries outside the EU is around 75% (for men: 81.4%, for women: 73.2%, for both sexes: 74.9%).

Table 7-7: Imports of knitted outerwear by sex and product categories, 1999–2001

	1999 tons	1999 1000 €	2000 tons	2000 1000 €	2001 tons	2001 1000 €
For men or boys						
Coats, raincoats, anoraks etc. (61.01)	3 140	55 584	3 102	55 338	2 001	43 034
Suits, jackets, ensembles, trousers, shorts etc. (61.03)	9 371	133 513	9 863	146 048	8 840	166 408
Shirts (61.05)	23 595	363 764	23 802	367 144	41 902	403 150
Total	**36 105**	**552 862**	**36 767**	**568 531**	**52 743**	**612 592**
Total extra EU	**32 075**	**418 277**	**31 501**	**447 370**	**51 584**	**498 460**
For women or girls						
Coats, raincoats, anoraks etc. (61.02)	6 927	101 084	5 151	103 193	4 935	84 899
Suits, ensembles, jackets, dresses, skirts, trousers (6104)	20 397	424 328	21 087	475 642	24 599	451 713
Blouses and shirt blouses (6106)	5 937	127 397	7 068	164 416	10 994	153 203
Total	**33 261**	**652 809**	**33 305**	**743 251**	**45 463**	**689 816**
Total extra EU	**26 341**	**438 219**	**27 532**	**531 319**	**42 905**	**505 146**
For both sexes						
T-shirts, singlets etc. (61.09)	61 853	968 630	80 539	1 025 848	131 812	1 204 848
Jerseys, pullovers, cardigans, waistcoats etc. (61.10)	79 939	1 511 788	79 909	1 699 627	114 834	1 532 412
Babies garments (61.11)	8 459	197 290	10 800	265 765	11 586	282 027
Impregnated clothing (61.13)	345	7 385	496	12 672	561	12 476
Total	**150 596**	**2 685 093**	**171 744**	**3 003 913**	**258 794**	**3 031 763**
Total extra EU	**111 011**	**1 874 552**	**128 157**	**2 364 418**	**206 343**	**2 461 586**

	1999 tons	1000 €	2000 tons	1000 €	2001 tons	1000 €
Active Sportswear						
Track suits, ski suits and swimwear (61.12)	4 618	106 736	4 105	121 560	15 624	146 653
Other sportswear (61.14)	2 186	53 535	2 353	66 633	3 532	80 731
Total	**6 804**	**160 271**	**6 458**	**188 192**	**19 155**	**227 384**
Total extra EU	**5 144**	**106 524**	**4 993**	**140 015**	**15 361**	**169 649**

Source: Eurostat Luxemburg March 2002, year 2001 based on January to August 2001

Table 7-8 shows the imports of woven outerwear into the UK. From 1999 to 2001 the total imports of woven outerwear for women in value terms increased at a greater rate than for men. The imports of woven men's wear increased from € 2,146 million in 1999 to € 2,533 million in 2000 and stagnated in 2001 at € 2,506 million.

The import volume of woven men's wear has reduced from 206 million tons in 1999 to 132 million tons in 2001. This figure indicates that the import prices for woven men's wear increased significantly, although it is known that there is general price deflation in the UK clothing sector. This contradiction can be explained by the fact that men's wear, and in particular woven wear, played an important role in the last seasons, resulting in partial price increases.

The decrease in imports in 2001 compared to 2000 is valid for all outerwear product categories for men in value terms, except for shirts which increased by 11.9 million € to 710.6 million €.

The woven women's wear imports increased continuously from 1999 to 2001 and amounted to € 2,669 million in 2001. Whereas ladies suits, ensembles, jackets, dresses, skirts and trousers (HS Code 62.04) and blouses (HS Code 62.06) were imported more in 2001, coats, capes, anoraks and windbreakers (HS Code 62.02) suffered a decrease of 11%. (value terms)

The strong increase of women and girls outerwear imports into the UK can be underlined by the following figure: +36.7% in three years from 1999 to 2001 (value terms). Similar to men's wear, 77.7% of all ladies outerwear imports come from non-EU countries. More details can be taken from Table 7–8.

The clothing exporter selling to the UK can easily select 'his specific product group' from the import Table 7–7 and Table 7–8 in which he is working (HS Code indicated in column 1) and analyse the specific import developments in terms of value and volume from 1999 to 2001.

Table 7-8: Imports of woven outerwear by sex and product categories, 1999–2001

	1999 tons	1999 1000 €	2000 tons	2000 1000 €	2001 tons	2001 1000 €
For men or boys						
Coats, anoraks, windcheaters etc. (62.01)	17 164	343 458	16 411	351 852	11 966	320 553
Suits, jackets, ensembles, trousers, shorts etc. (62.03)	121 875	1 209 307	121 164	1 482 582	84 605	1 475 147
Shirts (62.05)	66 935	593 132	54 837	698 689	35 937	710 615
Total	**205 973**	**2 145 897**	**192 412**	**2 533 123**	**132 509**	**2 506 316**
Total extra EU	**144 018**	**1 387 229**	**89 547**	**1 760 280**	**94 726**	**1 776 459**
For women or girls						
Coats, capes, anoraks, windjackets etc. (62.02)	13 286	291 900	14 767	338 322	11 597	301 502
Suits, ensembles, jackets, dresses, skirts, trousers (62.04)	83 443	1 748 685	120 467	2 207 454	171 249	2 572 380
Blouses and shirt blouses (62.06)	52 826	472 200	25 719	523 387	39 253	560 705
Total	**149 555**	**2 512 785**	**160 953**	**3 069 163**	**222 099**	**3 434 586**
Total extra EU	**117 642**	**1 750 425**	**109 061**	**2 319 306**	**163 681**	**2 668 812**
For both sexes						
Babies garments (62.09)	4 606	85 915	4 118	110 042	5 003	124 579
Other incl. Impregnated (62.10)	–	261 943	–	–	–	–
Total	**4 606**	**347 858**	**4 118**	**110 042**	**5 003**	**124 579**
Total extra EU	**3 515**	**279 037**	**3 532**	**89 597**	**4 518**	**107 199**

Source: Eurostat Luxemburg March 2002, year 2001 based on January to August 2001

7.3.2 Outward Processing Trade (OPT)

Unfortunately, there is practically no information available about the OPT business in the UK. Some figures indicate that there is actually quite a substantial subcontracting business e.g. with Maghreb countries and Eastern Europe. Morocco for example, carries out 27% of it's outerwear clothing exports to the UK via OPT business in 1999; in Romania, the percentage was 46%. Therefore, in Romania OPT business represents nearly half of its total woven exports to the UK. A large part of the woven imports from Poland, Sri Lanka and Hungary are also made in cut-and-sew work.

The cut-and-sew business has decreased with countries like Poland, Slovenia and Serbia for the last few years, but showed increases with trading partners like China, Sri Lanka and Indonesia. It must to be noted that the methods of import depends heavily on the quota restrictions and tariffs. Imports, especially on OPT basis, also imply that the buyer has built up a network of producers in a specific country that have to be controlled intensively to safeguard the requested quality standards and reliability.

7.3.3 Largest suppliers of outerwear

UK domestic clothing production has declined, whereas imports have increased. This development has opened and will open good sales opportunities to manufacturers; especially those from developing countries. Table 7–9 gives a good survey on the performance of the 15 leading clothing suppliers to the UK. The share of clothing imports from non-EU countries is 76%. EUROSTAT states that in 2001 € 10.4 billion of outerwear was imported to the UK: € 7.9 billion outerwear from outside the EU and € 2.5 billion outerwear from EU countries. Approximately half of the clothing imports originate from developing countries. While the imports from outside EU increased by 27% in 2000 and in the year 2001 by 8.1% the imports from EU countries declined significantly by 6.5% in 2000 and by 4.2% in 2001.

The main import countries from developing or emerging markets are China (1,441 million €), Turkey (945 million €), Hong Kong (764 million €), Bangladesh (557 million €), Indonesia (409 million €) and India (379 million €). Four out of the countries mentioned increased their exports to the UK; only Hong Kong reduced it by 15.5%.

Among the 'winner countries' Turkey has an excellent performance with +36.5 %, the highest increase among the 20 leading clothing suppliers to the UK. The second best performing country is Romania with an increase of + 29.2% followed by India with + 23.2% and Bangladesh with +19.3%. The "loser" countries are Germany (18.8%), South Korea (18.2%), Hong Kong (15.5%), Ireland with 10.0%, Malaysia (5.7%) and Mauritius (5.6%) (value terms 2001 compared to 2000). All those countries with highly increasing production costs have lost shares in the British clothing market.

Looking at the country shares in total import, China maintains the major part with 13.9% of total imports. Turkey also plays a significant role with 946 million € and a share of 9 %. The main developing import countries are China (13.9%), Hong Kong (7.3% under the assumption that > 80% of the garments exported ex Hong Kong are produced in China), Bangladesh (5.3%), Indonesia (3.9%), and India (3.6%). These countries alone stand for more than a third of the total clothing imports.

Table 7-9: Largest supplying countries of outerwear, 1999–2001

Position	Country	1999 in 1000 €	Change from 1999	2000 in 1000 €	Change from 2000	2001 in 1000 €
1	China	1 069 661	13.9%	1 218 582	18.3%	1 441 067
2	Turkey	468 321	48.0%	692 908	36.5%	945 675
3	Hong Kong	740 555	22.0%	903 768	–15.5%	763 975
4	Bangladesh	315 492	48.0%	466 975	19.3%	557 147
5	Italy	480 903	–2.7%	467 935	8.5%	507 801
6	Fr Germany	534 466	–2.3%	521 981	–18.8%	423 783
7	Indonesia	292 509	35.4%	396 061	3.3%	409 328
8	India	248 821	23.7%	307 912	23.2%	379 244
9	Morocco	289 391	28.5%	371 727	1.4%	377 080
10	France	327 012	10.0%	359 624	3.7%	373 038
11	Belgium	334 009	12.2%	374 833	–2.4%	366 016
12	Romania	164 560	49.4%	245 896	29.2%	317 643
13	Sri Lanka	267 157	26.9%	339 142	–13.0%	294 970
14	Portugal	338 210	–20.4%	269 366	1.4%	273 246
15	Netherlands	385 678	–40.5%	229 616	–3.8%	220 982
16	Mauritius	186 729	16.0%	216 550	–5.6%	204 389
17	Thailand	118 905	34.8%	160 300	2.4%	164 080
18	Ireland	152 958	10.6%	169 117	–10.0%	152 188
19	South Korea	135 365	32.3%	179 108	–18.2%	146 428
20	Malaysia	116 290	18.6%	137 976	–5.7%	130 070
	EU	2 803 312	–6.5%	2 621 820	–4.2%	2 511 161
	Extra EU	5 757 581	27.1%	7 320 217	8.1%	7 914 160

Source: Eurostat Luxemburg March 2002, year 2001 based on January to August 2001 including

7.4 TRADE STRUCTURE

7.4.1 Developments in the retail trade

Looking at the basic structures in the British retail trade, the major statement is that the retailers have gone through a tremendous process of concentration in recent years. 10 (ten) companies control more than 40% of the retail trade. The British retail structure is dominated by clothing multiples with a market share of around 25%. The biggest players in this segment are e.g. the 'Arcadia Group' or 'Next'. The department and variety stores also play a dominant role with a market share of 25% among which Marks & Spencer (M&S) is the most important variety chain in the UK. As in other EU countries, with the exploding importance of the (clothing) chains, the role of the independent retailers (boutiques etc.) has gone back to a market share of about 10%. The mail-order houses represent app. 10% of the clothing retail market.

The better management of the 'supply chain' of retailers has changed the whole retail structure in the UK and Europe. This is even more true for Great Britain, where the degree of concentration at retail level is even higher than in other European countries. With a close look at 'price retailers' in the UK it can be clearly observed that they are optimising their supply chain. Buyers in the purchasing departments are not only buyers but also product and brand managers. Also, low stock keeping and concentration of the purchasing power on few big suppliers are characteristics of the UK retail market. Along with this development, the competition among the clothing suppliers from non-EU countries has also increased and demands with regard to service, reliability and keeping of high quality standards have to be fulfilled by companies that wish to remain on the 'supplier's lists'.

A further strong development in the British retail trade – apart from price orientation – is the emphasis on more service and attractive shop interiors. Consumers are not only prepared to invest in the product, but also accept higher prices for the distracting experience of shopping. Buying of clothing becomes a special and joyful 'event' achieved through a variety of entertaining and extensive store environments.

Formerly known as discount retailers, companies like Matalan have initiated new fashion designs, sub-brands and manage – in comparison to Marks & Spencer's – clearly positioned product lines. In general, buying clothing for little money has been "de-stigmatised" through the higher qualities and branding strategies of the retailers. BHS (British Home Stores) variety store started in the middle price segment and has moved more to an image as a discounter with relatively large reductions in price. The strategy of BHS targets clothing for adults and a special range for kids. All these 'discount retailers' follow the trend of the consumers looking for more for less money; this means more choice, more 'adventure', more service and more efficiency.

According to Marks & Spencer, the market has polarised into three segments: 1. Premium Fashion Brands, 2. fast 'One way Fashion and 3. 'Commoditisation' of basic products under the assumption that they will be regarded as simple commodity items which are sold only via low price. The retail specialists of Credit Suisse First Boston state (Mr. Tony Shiret, November 2001), that the crisis at Marks & Spencer has increased the destabilisation of the British clothing market. The increase of the clothing market has been 3% in 2001 and will be only 2–4% in 2002. Previously, increases of +6% annually had been expected.

According to a study by Verdict Research, London of 2001 'Forecasts Clothing & Footwear to 2006' competition for the middle market segment will increase even more. According to this analysis, the expenditures for clothing in the UK in 2006 will increase only by 8.8%. The best sales chances are predicted for the super markets, as the British consumer by 2006 will spend 3 Billion £ in this kind of retail outlet. These discounters will be among the winners as well; they will increase their market share by an increase in turn-over by 27 % until 2006. The upper market segment will grow by 16 % from 2001 to 2006.

7.4.2 Leading retailers

Table 7–10 gives a good survey on leading clothing shops/chains in the UK. Beside the clothing chains of the powerful ARCADIA Group, (sales volume £ 1.95 Billion in 2000) there are other clothing multiples like NEXT with 327 outlets and a sales volume of £1.59 Billion. Other important clothing multiples are BHS, ALEXON and RIVER ISLAND at the higher end of the market. C&A, one of the largest clothing retailers in Europe, tried to survive in Great Britain after experiencing serious marketing and sales problems, but finally failed with large losses, gave up its stores and drew back totally in 2001. In the meantime, C&A e.g. in Germany has modernised its sales strategy and has improved its previously poor image tremendously.

Looking at the sales figures of other important clothing stores, shops like MATALAN chain (96 outlets – discount strategy), MacKays (271), ETAM (212), New Look (452 – discount strategy), ALEXON (659), MONSOON (189) follow the company NEXT at a large distance. Woolworth is the second largest store chain for children's wear after M&S. ADAMS is the leading clothing chain only dealing in children's wear.

Table 7-10: Leading clothing retailers by turnover, 2001

Company	Description	Sales (£bn.)
Marks & Spencer	High street department store	4.58
Arcadia Group	Clothing multiple	1.95
Next	High street clothing multiple	1.59
GUS	Mail order	1.50
Debenhams	Department store	0.90
BHS	Clothing chain	0.82
Littlewoods	High street department store + Mail order	0.70
Asda (George)	Supermarket	0.60
Tesco	Supermarket	0.60
Matalan	Discount clothing chain	0.59
House of Frazer	Department store	0.57
John Lewis	Department store	0.47
Primark	Discount clothing chain	0.43
Burberry	Luxury department store and brand	0.43
New Look	Discount clothing chain	0.42
N Brown	Mail order	0.40
Mothercare	Department store for babies & children	0.33
River Island	High street clothing chain	0.29
Alexon	Clothing chain	0.22
Adams	Clothing chain for childrenswear	0.20

Source: "UK Clothing Retailers and Global Sourcing" by Peter Gibbon

The department store Marks & Spencer has the highest sales of clothing with 4.58 billion £. The second largest department-store that also has an important clothing department is DEBENHAMS, (clothing sales 900 million £) ranking among the five largest clothing retailers in the UK. They have 91 stores in the UK and have been very successful by running an own 'retail brand strategy' with more than 50 own brands!. The Home Shopping Catalogue 'Debenhams Direct' has been launched successfully and the number of catalogues has been increased to 300.000 in 20001 (www.Debenhams.com). Other department stores are LITTLEWOODS (clothing sales 0.7 Billion £), HOUSE OF FRASER (0.57 Billion £) and JOHN LEWIS (0.47 Billion £). MOTHERCARE is the largest department store for babies and children selling clothing for 0.33 Billion £ annually.

Among the mail-order houses GUS (clothing sales 1.5 Billion £) and N BROWN (clothing sales 0.4 Billion £) are leading. The well known ASDA (George) and the expansive TESCO are the two largest supermarkets ranking in position 8 (eight) and 9 (nine) among all clothing retailers in UK.

7.4.2.1 Retailers

7.4.2.1.1 Independent specialised retailers

The market share of independent clothing retailers has been quite stable over the past three years. The market shares for women's wear and men's wear differ significantly. In Great Britain only 8.5% of the women's wear and 13.9% of men's wear is sold through independent shops. The shrinking process of the smaller independent retailers (preliminary) has come to a stand still and the market has stabilized at a low level. More than 90 % of the independent retailers do not buy/import from overseas clothing suppliers but source abroad through their buying associations.

Market share:	8.5% (womenswear), 13.9% (menswear) in 2001
Trend:	slightly decreasing

7.4.2.1.2 Clothing multiples

The ARCADIA Group Plc. Is also undergoing a restructuring process. The ARCADIA Group (formerly known as Burton Group) with a market share of 10% and clothing sales of around 2.0 billion £ now ranks second with 2.200 outlets of several clothing chains with different names. In 2000, Arcadia cut 450 of its stores and 3,500 jobs. Having already sold a few of its formerly 14 fashion stores, Arcadia wants to concentrate further on its six top performing brands, including Top Shop, Top Man and Dorothy Perkins. The aim is to reduce space by closing down stores to save rental costs and to keep sales stable.

The re-shaping of the group entails a £ 35 Million deal to sell Warehouse, Principles, as well as the catalogue business Hawkshead and Racing Green retail chains to a management buyout team. Remaining companies are Wallis, Miss Selfridge, Outfit and the well known Burton Menswear and Evans. The Arcadia Group buys separately for each of its companies and each product group and there are buyers responsible for each product segment.

Those luxury shops that have traditional brands like BURBERRY'S, BARBOUR and PRINGLE play an important role for consumers older than 45 who have the appropriate income to buy quality collections. Burberry has been successful by re-launching their traditional labels and combine higher quality with higher prices. Burberry's consumer-oriented and elaborate marketing led to a 25% sales increase in the first quarter of 2001 compared to 2000. Similar developments can be detected for the retailers Daks, Aquascutum, Mulberry, Holland and Holland and Jaeger who combined classic brands with current market trends.

The more sophisticated taste of consumers and strong brand awareness is reflected by the trend for the more upmarket retailers such as the department store SELFRIDGES and the clothing chain HOUSE OF FRASER. Luxury shops like CARDINGTON, LIBERTY and HARVEY NICHOLS with the Hong Kong-based owner Dickson Concepts are considering expansions and refurbishments of their shops because of good profits. Cardington purchased the couture houses Hardy Amies and Norman Hartnell, Liberty re-launches its Regent Street store not only for Londoners but also for shopping tourists. Harvey Nichols will open more shops around the UK in addition the ones in London and Leeds.

Market share:	25.8% (womenswear), 20.8% (menswear) in 2001
Trend:	slightly increasing

7.4.2.1.3 Department stores

Among the clothing retailers, the department store MARKS & SPENCER in particular (M&S) suffered from fiercer competition and profits that turned into losses at the end of the nineties. However, with sales of around 4.6 billion £, M&S is still the largest British clothing retailer with a share of 11.4% in the total clothing market. With its middle priced items and its 294 stores, M&S, at least in the past, was sometimes viewed as old-fashioned or at least not very consumer oriented and unfocused areas in its outlets. On one hand it did not offer very cheap clothing to convince through price, and on the other hand, it did not offer highest quality. On the other hand also the buying relations to domestic suppliers proved to be too unsuccessful. The manufacturer William Baird, for instance, supplied 7% of M&S clothing. Despite long-term partnerships with William Baird, M&S decided to stop purchases and M&S now buys from outside the country and therefore follows the purchasing strategy of its competitors. In other European countries like France and Germany, M&S had to exit its retail engagement. M&S also terminated the US activities by end of 2001.

The activities are now concentrated only in Great Britain and it seems that the new efforts will prove to be successful. A journalist specialised on the UK retail market suggests that the key for the better performance of M&S in 2001 was the better fashion, better prices and a faster flow of goods. An M&S employee stated that the "perfect"-campaign, which mediates the message of giving the "ideal standard" design M&S, achieved more sales – not only in the womenswear segment, but also in the menswear segment. Moreover, there is a programme for general refurbishment of the stores and the outlets are updated and rearranged across the country.

Among all department-stores JOHN LEWIS has gained most market shares with + 1.5% in 1999 and still + 0.8% in 2000. The share of JOHN LEWIS in 2000 was 16.3%, DEBENHAMS with 13.4%, HOSE OF FRASER with 8.1%, ALLDERS with 4.9% and SELFRIDGES with 3.7%.

MARKS & SPENCER still keeps the no. 1 position with 33.1% (Verdict Research Ltd., London 2001).

Market share: 10.9% (womenswear), 8.9% (menswear) in 2001
Trend: constant to slightly increasing

7.4.2.1.4 Mail-order houses

The major currently active clothing mail order business companies are the British owned companies GREAT UNIVERSAL STORES (GUS) and LITTLEWOODS Home Shopping in co-operation with Arcadia and Empire Stores (French PRP). In this segment, customers can order within given bank credits from the mail-order companies.

The mail-order house N BROWN sells its products through a direct mailing marketing strategy. The German OTTO GROUP owns the mail order companies GRATTAN and FREEMANS. An employee of Freemans has given the information that the whole process of buying from foreign suppliers in mail-order business depends on the publishing of the catalogues; on top of this, manufacturers from abroad have to recognize that the lead times are quite long. The products have to be photographed and there is more preparation the necessary high street stores, for example, have to face.

Market share: 10.1% (womenswear), 8.1% (menswear) in 2001
Trend: slightly increasing

7.4.2.1.5 Textile discounters

Based on interviews with experts and importers in the UK it can be predicted that the battle in the mainstream market of middle priced clothing will continue. The pull out of C&A from the British market has implied a fight among the retailers to gain the consumers who previously bought from C&A. It is reported that mainly the discounters and the so called 'value for money chains' like PEACKOCKS and MATALAN will profit from the pulling out of C&A, but BHS which covers the middle priced clothing, and Next have taken advantage.

Therefore the "value" retailers like PEACOCKS and MATALAN and other discounters gained shares in terms of value in the past years and have a market share in clothing of 8.7% for women and 4.6% for men. However, MATALAN has changed its image from a 'cheap' discounter to a chain offering very low prices and new fashion designs.

Market share: 8.7% (womenswear), 4.6% (menswear) in 2001
Trend: strongly increasing

7.4.2.1.6 Grocery super- and hypermarkets

In the supermarket segment the supermarket ASDA, (Wal-Mart) with half of supermarket clothing sales, runs its clothing under the label GEORGE. The supermarket TESCO also sells some clothing.

Market share: 3.0% (womenswear), 2.7% (menswear) in 2001
Trend: strongly increasing

7.4.2.2 Sales Intermediaries

7.4.2.2.1 Clothing Manufacturers

In addition to retailers and wholesalers that import clothing to the UK, in some cases UK manufacturers partly outsource their production activities to manufacturers abroad. UK clothing manufacturers (mainly brands) have started outsourcing with the strong increase of production costs in the UK, mainly in Eastern Europe and Northern Africa. Many products (e.g. most of the knitted outerwear) are bought from Asia and Turkey on a 'finished product' basis (f.o.b. business).

British clothing 'manufacturers' are more management and marketing units than producers. They mainly concentrate on the design and on questions of current fashion as well as on marketing and sales. The brands sell their products to selected distribution channels that correspond with their marketing strategy. In any case, practically all British clothing brands source products abroad in the one or the other way and offer various sales opportunities for clothing manufacturers from abroad.

7.4.2.2.2 Central Buying Associations

Co-ordinated buying through central buying associations is a way for smaller UK retailers to gain more purchasing power. Since the clothing market in the UK is highly concentrated, with only a few big players who mainly buy directly from clothing manufacturers and there is little market share for small independent shops; the importance of central buying associations in the UK is low.

In Great Britain, importers/wholesalers have often taken over the 'buying function' for smaller retailers, as the latter mentioned do not have the know-how and the means to import on their own goods.

7.4.2.2.3 Sales Agents

There are different methods of indirect distribution from abroad to the various clothing retailers in Great Britain. One option is that local 'agents' identify the clothing suppliers abroad, but the UK retailer is still the one who negotiates with their in-house buying team and organises all the logistics including shipping etc. Most often British retailers use several ways of indirect contacts. Roughly speaking, half of these agents or wholesalers are located in the UK and half are located outside the UK. Agents are used by retailers to identify appropriate suppliers, to outsource the complete handling and control including communication with the supplier, the safeguarding of quality standards (especially for women's wear), the complete logistics including the import procedures, the production abroad according to ecological and social standards (code of conduct) etc.

A further option for the clothing manufacturer from abroad is selling through regional agents in Great Britain. The condition is whether or not the manufacturer disposes of a clear marketing strategy with a market oriented collection for the British market. The basis is an elaborated 'Business Plan'. The manufacturer from abroad should consider, that the area of 'Greater London' is highly competitive and it might be more advantageous to 'start' with the market entry in areas like Manchester, the North West or even Ireland.

7.4.2.2.4 Importers/wholesalers

For most suppliers to the UK market indirect selling is the first way to go for, although UK wholesalers are infrequently mentioned and are rarely visible, searching for them in the Internet proves to be very difficult. Some experts have stated that clothing wholesalers do not play an important role in the UK. Some British retailers do buy with the help of intermediary companies, and these wholesalers might even be outside the UK.

The principles and possibilities of indirect selling to the UK might be illustrated as follows: If the manufacturers clothing e.g. is sold at the shops of Marks & Spencer in the UK, the import may be done through a company somewhere in Europe and not necessarily in the UK. This can be confusing for clothing manufacturers from abroad when trying to get in contact with a buyer who only buys "within Europe". Nevertheless, selling clothing to the UK also means working, in general, with manufacturers in Europe that export to the British market.

Selling to wholesalers can be more profitable, because desperately trying to sell directly to the retailers may not work and might result in no orders at all, as many British retailers 'source' through those wholesale and import units. The main function of wholesalers cannot be described merely as 'buying and selling and gaining a high margin'. As a wholesaler from Liverpool stated, the wholesaler e.g. also makes sure that the brand labels are attached to each delivered product, and that the manufacturer is informed which quality and ecological standards have to be fulfilled. The wholesalers also knows most of the details about the retailer's needs. Other tasks and functions of the wholesaler within the sourcing process include the know-how about the standards of the designs and as well as knowledge of the technical aspects of the products to be produced.

The British wholesaler normally also advises the manufacturer to put the appropriate label on the product, as the concept of own 'Retail Brands' has become of crucial importance to the retailers in the UK offering them more independence from the clothing manufacturers and running an own 'brand concept' with presumably better margins. The British wholesaler normally is fully involved in these processes to guarantee the 'right product at the right time in the right place'.

7.5 UK FASHION TRADE FAIRS

The UK has achieved a better image for clothing design in the last few years and is competing with France and Italy. With London as a major fashion centre in Europe, the United Kingdom has gained more importance as a 'Fashion Country'; additionally, a great deal of support from the British government has been an encouraging factor. 'London Design' is said to have a very modern or even avant-garde style and influences the European 'fashion scene' to a certain extent.

As a consequence also the importance of the British clothing, trade fairs have increased in recent years. According to interviews conducted, London offers the clothing fairs with major importance in UK. There have been many clothing fairs in Great Britain in the last 5 (five) years, and the British clothing fair market is extremely fragmented. Today it is still highly recommended to check exact dates and venues of the smaller British fairs beforehand, as the 'fair scene' keeps on changing its names and locations.

The main trade fair for clothing in Great Britain is the London Fashion Week. Three more fairs take place parallel to the London Fashion Week: Pure and 40° taking place twice a year (February and August). At Pure contemporary and classic collections are shown and 40° is a trade fair for youth fashion, sportswear and lifestyle brands. Other trade shows in Harrogate (PRIMA – Lingerie and Swimwear) are targeting more the northern part of the country, including Scotland, and therefore have more regional importance. An exception is the Premier Childrenswear in Birmingham, which has found its niche in the kid's wear segment.

The exhibitions Premier Kids, 40°, Pure are organised by EMAP. The London Fashion Week is organised by the British Fashion Council.

There are also some smaller specialised fairs like the 'London Design Week', 'London Corporate Wear Week', 'Retail Solutions' in Birmingham or Harrogate Bridal Exhibition which might be of interest for manufacturers from abroad specialised in the respective product groups presented during the fair. In any case, brief research about the importance and the concept of the fair to be attended is essential. Table 7–11 gives a brief survey on the major British clothing fairs with names, venues and dates.

Table 7-11: Overview of UK Fashion Trade Fairs

Trade Fair	Products	Location	Dates
London Fashion Week	designer wear	London	February and August
Pure	directional and contemporary womenswear; modern and classic collections	London	February and August
40°	sportswear and lifestyle brands	London	February and August
Premier Kids	jeans, sportswear, young fashion, streetwear	Birmingham	January and July
PRIMA Harrogate	women's wear, lingerie and swimwear	Harrogate	February and August
Moda UK	ladies' wear	Birmingham	February and August

Source: Textilwirtschaft Frankfurt/Main, Fair Guide 2002

7.6 LIST OF MAJOR BUYERS OF LADIES, MEN'S AND CHILDREN'S WEAR IN GREAT BRITAIN

Clothing Chain Stores

Amber Day Holding PLC
'What Everyone Wants' chain
296 Springfield Road
GB Glasgow G40 3HZ
Tel. +44 – 141 – 556 7111
Fax. +44 – 141 – 554 2503

Product range: Ladies, men's, children's wear

Price segment: Middle level

Number of outlets: 40

Arcadia Holding plc (Burton Group Ltd.)
214 Oxford Street
GB – London W1N 9DF
Tel. +44 – 207 – 636 8040
Fax. +44 – 207 – 927 7651
www.arcadiagroup.co.uk

Product range: Ladies, men's, children's wear

Price segment: Middle level

Number of outlets: 2000 + mail-order business

Bon Marché Ltd.
School Lane, Kirkheaton
GB – Huddersfield HD5 OJS
Tel. +44 – 1484 – 513688
Fax. +44 – 1484 – 513424
www.bonmarche.co.uk

Product range: Ladies's wear

Price segment: Lower level

Number of outlets: 180

Ciro Citterio Menswear plc
70 Church Road, Aston
GB – Birmingham B6 5TY
Tel. +44 – 121 – 328 0633
Fax. +44 – 121 – 327 1317
www.cirocitterio.co.uk

Product range: Men's Wear

Price segment: middle to upper

Number of outlets: 175

Ethel Austin Ltd.
School Lane, Knowsley Industrial Estate
GB – Knowsley, Merseys L34 9GH
Tel. +44 – 151 – 546 7621
Fax. +44 – 151 – 549 1380

Product range: Ladies, men's, children's wear

Price segment: Middle level

Number of outlets: 200

Greenwoods (Mens Wear) Ltd.
White Cross, Guiseley
GB – Leeds, W. Yorks LS20 8ND
Tel. +44 – 1943 – 876100
Fax. +44 – 1943 – 870122
www.greenwoodsmenswear.ltd.uk

Product range: Men's Wear

Price segment: Upper level

Number of outlets: 150

Leon Allan Mans Shops plc
70 Church Road
GB – Aston, Birmingham B6 5TY
Tel. +44 – 121 – 328 0633
Fax. +44 – 121 – 328 3442

Product range: Men's wear

Price segment: Middle level

Number of outlets: 40

QS Familywear plc.
121 Gardener Road, Portslade
GB – Brighton BN1 IQS
Tel. +44 – 1273 – 874444
Fax. +44 – 1273 – 874433
www.qsgroup.co.uk

Product range: Ladies, men's, children's wear

Price segment: Lower level (value for money)

Number of outlets: 115

River Island Clothing Co.
Chelsea House, West Gate
GB – London W5 1DR
Tel. +44 – 181 – 998 8822
Fax. +44 – 181 – 997 3953
www.riverisland.com

Product range: Ladies' and men's wear

Price segment: Middle to upper level

Number of outlets: 200

Salisbury's Ltd.
Eccleshall Road South
GB – Sheffield S11 9PX – South Yorkshire
Tel. +44 – 114 – 262 0062
Fax. +44 – 114 – 262 0000

Product range: Ladies' and men's wear

Price segment: Middle level

Number of outlets: 350

Sears Holding Ltd.
40 Duke Street
GB – London W1A 2 HP
Tel. +44 – 207 – 408 1180
Fax. +44 – 207 – 408 1027
www.riverisland.com

Product range: Ladies, men's and kid's wear

Price segment: from lower to upper level

Number of outlets: > 500

Note: Department store, clothing chain and mail-order house (own several chains)

TOP MAN
70 Berners Street
Colegrave House
GB – London W1P 3AE
Tel. +44 – 207 – 636 8040
Fax. +44 – 207 – 291 2434
www.topman.co.uk

Product range: Men's wear

Price segment: Lower to middle

Number of outlets: 200

Note: Belongs to ARCADIA Group

TOP SHOP
70 Berners Street
Colegrave House
GB – London W1P 3AE
Tel. +44 – 207 – 636 8040
Fax. +44 – 207 – 291 2434
www.topshop.co.uk

Product range: Ladies' wear

Price segment: Middle level

Number of outlets: 270

Note: Belongs to ARCADIA Group

Wallis Fashion Group Ltd.
Garrick Road, Hendon
GB London NW9 6QA
Tel. +44 – 181 – 202 8252
Fax. +44 – 181 – 202 5825
www.aracadiagroup.co.uk
(no own website)

Product range: Ladies' wear

Price segment: Lower to middle level

Number of outlets: 190

Note: belongs to ARCADIA Group

Warehouse Ltd.
361/373 City Road
GB – London EC1V 1LR
Tel. +44 – 207 – 278 3491
Fax. +44 – 207 – 833 0183

Product range: Ladies' wear

Price segment: Middle level

Number of outlets: 95 + mail-order

Department Stores

Allders Department Stores Ltd.
Rothschild House – The Whitgift Cenre
P.O.Box 359
GB – Croydon, Surrey CR9 1NN
Tel. +44 – 181 – 256 7700
Fax. +44 – 181 – 256 7911
www.allders.com

Product range: Ladies wear

Price segment: Lower to middle level

Number of outlets: 11

Debenhams Ltd.
1 Welbeck Street
GB – London W1A 1DF
Tel. +44 – 207 – 408 4444
Fax. +44 – 207 – 408 4444
www.debenhams.com

Product range: Ladies', men's and kid's wear

Price segment: Middle level

Number of outlets: 97

House of Fraser Ltd.
1 Howick Place
GB – London SW1P 1BH
Tel. +44 – 207 – 963 2000
Fax. +44 – 207 – 828 8885
www.houseoffraser.co.uk

Product range: Ladies' and men's wear

Price segment: Upper level (brand orientation)

Number of outlets: 51 (under 16 names)

John Lewis Partnership Ltd.
207 Victoria Street
GB – London – SW1E 5NN
Tel. +44 – 207 – 828 1000
Fax. +44 – 207 – 592 6333
www.johnlewis.com

Product range: Sports and Leisurewear

Price segment: Lower to middle level

Number of outlets: 23 stores + supermarkets

Liberty + Co. Ltd.
21q Regent Street
GB – London W1R 6AH
Tel. +44 – 207 – 734 1234
Fax. +44 – 537 – 9876
www.liberty.co.uk

Product range: Ladies' and men's wear

Price segment: Upper level

Number of outlets: 5

Note: Department store + mailorder

Littlewoods Chain Stores + Mailorder Stores Ltd.
The J.M. Centre – 100-110 Old Hall Street
GB – Liverpool L70 1AB
Tel. +44 – 151 – 242 60000
Fax. +44 – 151 – 242 6385
www.littlewoods.co.uk

Product range: Ladies', men's and kid's wear

Price segment: Lower to middle

Number of outlets: 120 + 166 catalogue shops

Marks + Spencer Ltd.
47/67 Baker Street
GB – London W1A 1DN
Tel. +44 – 207 – 935 4422
Fax. +44 – 207 – 487 2679
www.marksandspencer.com

Product range: Ladies', men's and kid's wear

Price segment: Middle level

Number of outlets: 373 stores + 78 franchising partners

Next Retail Ltd.
Desford Road
GB – Enderby Leicester LE9 5AT
Tel. +44 – 116 – 286 6411
Fax. +44 – 116 – 284 8998
www.next.co.uk

Product range: Ladies', men's and kid's wear

Price segment: Middle level

Number of outlets: 330 stores + 43 franchising partners + home shopping

Woolworths + Co.Ltd.
242/246 Marylebone Road
GB – London NW1 6JL
Tel. +44 – 207 – 262 1222
Fax. +44 – 207 – 706 5416
www.woolworths.co.uk

Product range: Kid's wear

Price segment: lower to middle level

Number of outlets: 700

Manufacturers/Importer and Wholesalers/Importers:

J. Brownleader
26, Laycot Street – Islington
GB – London N1 1 SX
Tel: +44 – 207 – 354 2468
Fax. +44 – 207 – 354 2593

Campari UK Ltd.
International House
Priestly Way – Staples Corner
GB – London – NWW2 7AZ
Tel. +44 – 208 – 450 0081
Fax. +44 – 208 – 923 996

County Coats
61-75 Alie Street
GB – London E1 8EL
Tel. +44 – 207 – 709 9682
Fax. +44 – 207 – 702 2870

D. Conrad Int. Ltd.
Daisy Works
345, Stockport Road – Longsight
GB – Manchester M13 OLF
Tel. +44 – 161 – 274 3777
Fax. +44 – 161 – 274 4040

Horace Battin + Co. Ltd.
12, Sheep Street
GB – Wellingborough – Northants NN - 1BL
Tel. +44 – 933 – 22 3245
Fax. +44 – 933 – 44 2096

J.D.K. Ltd.
20, Pollard Street East
GB – Manchester M10 4ET
Tel. +44 – 161 – 273 7371
Fax. +44 – 161 – 273 3154

Jefferson Ltd.
34 – 42 Cleveland Street
GB – London W1N 8QQ
Tel. +44 – 207 – 580 9514
Fax. +44 – 207 – 636 2380

Jenice Ltd.
3947 Bethnal Green
GB – London E1 6LE
Tel. +44 – 207 – 377 0105
Fax. +44 – 207 – 247 3292

Liam David Ltd.
Coburg House 35 Sefton Street
GB – Liverpool L8 5SL
Tel. +44 – 151 – 706 0060
Fax. +44 – 151 – 706 0061
www.ldl.uk.com

Propeller UK Ltd.
A.M.C. House
12, Cumberland Avenue
GB – London NW 10 7RG
Tel. +44 – 208 – 838 0100
Fax. +44 – 208 – 838 0981

Sonetti Casuals
22, Westwood Park Trading Estate
Concord Road
GB – London W3 OTH
Tel. +44 – 208 – 993 0822
Fax. +44 – 208 – 993 8027

F. Thomas Ltd.
Midland Road – Higham Ferrers
GB – Northants NN10 8DN
Tel. +44 – 933 – 410 272
Fax. +44 – 933 – 319 157

Waddington M.C.A. Ltd.
131, Cottingham Road
GB – Hull HU 2DH
Tel. +44 – 482 – 443 101
Fax. +44 – 482 – 473 604

Westbridge International Ltd.
Holland Street – Hyson Green
GB – Nottingham NG7 5DS
Tel. +44 – 602 – 782 254
Fax. +44 – 602 – 420 547

Mail Order Companies

Empire Stores Ltd.
18, Canal Road
GB – Bradford D99 4XB – W. Yorks
Tel. +44 – 1274 – 72 9544
Fax. +44 – 1274 – 76 3816
www.empirestores.co.uk

Product range: Ladies', men's and kid's wear

Price level: Lower level

Freemans Ltd. (Otto Versand)
143, Clapham Road
GB - London SW88 OHR
Tel. +44 - 207 - 820 2000
Fax. +44 - 207 - 820 2769
www.freemans.com

Product range: Ladies', men's and kid's wear

Price level: Lower to middle level (value for money)

Grattan (Otto Versand)
Anchor House, Ingleby Road
Bradford, BD992XG
Tel.: 0127-4575511
Fax: 0127-4625591
www.grattan.co.uk

Product range: Ladies', men's and kid's wear

Price level: Lower to middle

Great Universal Stores Ltd. (GUS)
Devonshire Street North – Universal House
GB – Manchester M60 6EL
Tel. +44 – 161 – 273 8282
Fax. +44 – 161 – 277 4881
www.gusplc.com

Product range: Ladies', men's and kid's wear

Price level: from Lower to upper level

Note: 12 different mail-order lines

JD Williams + Co. Ltd.
53, Dale Street – P.O.B. 285
GB – Manchester M60 6ES
Tel. +44 – 870 – 160 61 00
www.jdwilliams.co.uk

Product range: Ladies', men's and kid's wear

Price level: Middle to lower level

Note: No.1 in UK with 20 catalogue brands

Jeans and Young Fashion Chains

Alexon plc.
40 – 48 Guildford Street
GB – Luton – Bds. LU1 2PB
Tel. +44 – 1582 – 72 31 31
Fax. +44 – 1582 – 399 864
www.caseys.com

Product range: Men's and ladies outer- and sportswear
Price segment: Middle level
Number of outlets: 357 stores + 988 concessions
Note: Manufacturer and retailer

Blacks Camping Ltd.
Unit 1, Parkers House – Regent Street
GB – Cambridge CB 2 1DB
Tel. +44 – 191 – 417 0414
Fax. +44 – 191 – 415 3418
www.adhoc.co.uk

Product range: sportswear

Price segment: Middle level

Number of outlets: 125

Cromwells Madhouse plc.
Fulton Road, Unit 3
Palace of Industry
GB – Wembley HA9 OTL – Middlesex
Tel. +44 – 181 – 903 5888
Fax. +44 – 181 – 903 0303
www.madhouse.co.uk

Product range: Ladies' and men's jeanswear

Price segment: Lower to middle level

Number of outlets: 55

Gilesports plc
Fortran Road, St. Mellons
GB – Cardiff CF3 OLT
Tel. +44 – 1222 – 77 44 00
Fax. +44 – 1222 – 77 44 01
www.gilesports.com

Product range: Sportswear

Price segment: Upper level (mainly brands)

Number of outlets: 50

Paco Life in Colours
Kirkshaws Road
GB – Coatbridge ML5 4RP
Tel. +44 – 1236 – 44 9066
Fax. +44 – 1236 – 44 9021

Product range: Sportswear

Price segment: Middle level

Number of outlets: 50

Sports Division
Marathon House
Brybridge Road
GB – Dundonald KA2 9BB
Tel. +44 – 1563 – 85 11 66
Fax. +44 – 1563 – 85 09 58

Product range: Sportswear

Price segment: Middle level

Number of outlets: 270

Note: Largest British retailer for sportswear

Buying Associations:

Greater Nottingham – Co-op Society Ltd.
Swiney Way, Taton
GB – Nottingham NG9 6GZ
Tel. +44 – 115 – 950 22 33
Fax. +44 – 115 – 946 3052
www.gnpartnership.co.uk

Note: Textile distribution centre

Co-operative Retail Services UK
29, Dantzic Street
GB – Manchester M4 4BA
Tel. +44 – 161 – 832 8152
Fax. +44 – 161 – 833 1816

Note: Central buying organisation for supermarkets, convenience shops and department stores

Co-operative Wholesale Society Ltd. (CWS)
Non Food Retail
New Century House – P.O.B. 53
GB – Manchester M60 4ES
Tel. +44 – 161 – 834 1212
Fax. +44 – 161 – 834 4507

Note: Purchasing dep. for menswear in Manchester; for womenswear purchasing dep. in Mensfield

Intersport G.B.
Tything Road
Arden Forest Industrial Estate
GB – Alcester B49 6EP – Warwicks
Tel. +44 – 1789 – 76 32 72
Fax. +44 – 1789 – 76 41 33
www.intersport.co.uk

Products: (Active) sports- and casual wear