Beyond Needles and Thread:

Changing Supply Chains in the UK

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Introduction To The UK clothing industry

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I. Introduction

The textiles and clothing sector remains one of the most significant in the UK, accounting for over 300,000 workers, equivalent to one in every 78 jobs in the UK economy[1]. However, at its pre World War II peak, the sectors collectively employed almost 1.5 million people.

During the 19th century the sector has undergone several dramatic periods of restructuring, resulting in significant transition from the labour intensive "craft" based industry of the first half of the century. By the 1970s, clothing manufacture was associated with large-scale production utilising *Fordist* production methods to secure economies of scale. Retailing was correspondingly standardised, and large multiple chains emerged in parallel with manufacturing conglomerates.

More recent changes have seen the consumer develop a greater preference for choice and value, while recession and changing economic priorities have resulted in maturity of the clothing market. Retailers have increasingly attempted to provide value by importing goods from lower cost manufacturing countries. However, this strategy has done little to provide the freedom of choice demanded by consumers. Although global production capacity is developing rapidly, the requirement for greater flexibility towards fluctuating demand has encouraged retailers to review their sourcing strategies in an attempt to stimulate sales and add value. At the same time it has been necessary to identify new approaches to cost-saving in order to compensate for the loss of scale economies that has arisen from the growth of more flexible production. The impact of these pressures has been pushed up the production channel and have now impacted at all stages of the apparel value chain.

This report identifies the historical and current developments that have occurred in the manufacture and retail of clothing in the UK and explores the impact of these changes on the sector and its workforce, within the context of the local, national and global economy.

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[1] Annual Employment Survey, Labour Market Trends, February 1999.

II. Profile of the Clothing Industry

In 1997, UK production of apparel (including knitted outerwear) was valued at £7,929 million, with production of textiles adding a further £8641 million. Apparel production includes a wide range of products, dominated by women's and girl's outerwear, which accounts for 29% of production value, followed by men's outerwear and underwear (see table 2.1).

II.1 Technology, R&D, and technological change

One of the most notable characteristics of the clothing sector is the extent to which parts of it have remained labour intensive. Although sewing machines have become increasingly sophisticated and are more frequently computer controlled, with integral accessories such as thread and fabric trimmers, the basic technique of handling fabric remains little changed. Those machines that have become automated have been developed to handle standardised products such as men’s shirts and jeans.

Other stages of the production process have addapted more easily to technological advances. These include pre-production processes (particularly pattern making, lay planning and cutting), stock handling systems for moving components through the production process and information management systems. Much of the developments are again targeted towards standardised products and large production runs. This restricts take-up among small firms and those operating flexible production systems. Obstacles include high investment costs and increased change-over when new styles are introduced.

Further new developments have occured in associated textile production and finishing and in information technology that aid quick response and added-value production. These will be discussed further in later chapters.

The textiles, clothing and leather products industries collectively spend £27 million (1996) per year on research and development. This is just 0.29% of the national total[2].

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[2] Office National Statistics: R&D in UK Businesses, 1996

II.2 The changing level and composition of output

II.2.a Output

Table 2.2 illustrates that, while apparel output per head has increased consistently, gross output declined in the mid 1980s, as large manufacturers, wholesalers and retailers have increased their overseas sourcing activities at the expense of domestic production. Although growth is evident since this period, the sector has struggled to regain the 1980s output level. Data from 1995 (table 2.2) suggests that net output per head is now falling, perhaps as a result of increased flexibility in manufacturing and the loss of the most economic, large scale production to lower labour cost countries.

In monetary terms, the relationship between added-value and output has also changed in recent years. In 1987, gross added-value represented 42% of gross output of clothing, rising to 45% by 1990 (see table 2.3). However, by 1995, the proportion of gross output accounted for by value-added was only 38%. At a time when adding-value has become apparent as a major issue for the sector, this apparent lack of success could be a result of increasing sourcing of finished goods or components or pressure on prices that has restricted the suppliers' capacity to add monetary value. These issues will be explored later.

II.2.b Output by men's and women's clothing

By product, gross output of women's wear increased steadily until a slump in 1991, from which a recovery has now taken place. Gross output of men's wear slumped in the early 1980s and failed to recover fully before a further decline in 1991. Recent figures suggest that the value of menswear production is now growing, albeit from a relatively low base (table 2.4).

By sub-sector, the most consistent growth in per-head net output has been in men's outerwear, in spite of fluctuations in gross output. A recent dramatic fall in net output per head is noticeable in women's wear, especially outerwear, which has been most vulnerable to changes in requirements for flexibility and small scale production (see table 2.5)

II.3 Trade and market share

II.3.a Imports

One of the most significant influences on the apparel market is the level of import penetration. Imports of apparel were valued at £6,750 million in 1997[3]. Based on the level of UK production, and taking apparel exports into account, these figures indicate an import penetration level of 58% for all apparel, see table 2.6. First indications suggest that for the first half of 1998 import penetration fell slightly to 56%. Seasonal variations may account for this small variation.

Import penetration has grown most significantly from a low base in the 1960s and 1970s, when the majority of apparel imports were branded fashion goods imported from France, Italy and Germany. As demand for standardized products reached its peak in the 1980s, low cost imports began to increase. The import base for women's wear has historically been lower than that for men's wear, but shows a pronounced increase during the late 1980s. Throughout the 1990s, however, it is men's wear that has again shown the greatest increases in import penetration rates, especially in product areas such as knitted shirts and casual trousers that have become fashionable. Recent figures suggest that, while the balance of trade in men's wear becomes increasingly negative, that for women's wear has stabilized (table 2.7). This reflects (until the recent onset of unfavourable export conditions) both growth in overseas demand for UK exports and also a growing trend by retailers to maintain domestic supply for fashion sensitive products, facilitating quick response to minimize the risk of markdowns and missed sales opportunities.

Statistics do not yet fully reflect the difficult trading conditions known to be affecting the sector. High Sterling exchange rates have reduced exports and favor imports to the extent that dramatic rises in both the level of import penetration and the negative balance of trade could result.

The primary suppliers of imports are Hong Kong, India, China, Turkey and Bangladesh, with the latter two showing the fastest rates of growth. Imports from Greece and Portugal are significant and increasing. Major imports by product include knitted shirts (including T-shirts), woven shirts, blouses, knitwear and woven trousers. These are primarily standardized products with predictable seasonal demand levels. New sources of supply in Eastern Europe have rapidly been integrated into the global supply chain, and provide expertise in formal, structured garments that were previously sourced from domestic manufacturers.

[3] BATC Trendata, Q4/ 1996

Sourcing strategies for companies importing from China and Indonesia differ from those sourcing from Turkey, Morocco and Southern and Eastern Europe. Asian countries provide very low labor costs and are a source of long runs of standardized garments. Price differentials between UK and China outweigh the risks of ordering well before the season and holding goods in stock. Sourcing from southern and eastern Europe is more costly, but provides a quick response capacity for relatively small quantities.

II.3.b Outward Processing

Within the European Union, preferential trading arrangements have enabled manufacturers to take advantage of quotas enabling them to export European fabrics for assembly overseas, paying import duties only on the value-added during this process. Due to the direct import activity of retailers themselves, and the "made in UK" policy historically utilized by some chains, outward processing has not been as widely utilized by UK manufacturers as has been the case in other countries. However, other than Italy, outward processing from the UK has shown the most rapid growth in the EU, as shown in table 2.8.

Manufacturers are increasingly looking for overseas sourcing opportunities in response to pressure on prices. This policy reflects a change in retail strategy from "made in the UK" to "sourced in the UK" and greater emphasis on the provision of quality and value. It also illustrates the extent to which suppliers, particularly to the major chain stores, have accepted responsibility for managing stock for their customers through inventory control rather than through quick response manufacturing in response to sales information.

Since January 1999, liberalization of trade regulations will result in retailers being able to access OPT quotas in their own right for the first time. In addition, expansion of the EU free trade area to encompass North Africa and Central Europe will provide greater choice and capacity for outward processing companies.

II.3.c Retailers and overseas trade

It is retailers rather than manufacturers who have led the trend for overseas apparel sourcing. Historically most of apparel imports were of high value goods. These were traditionally sold through department stores and "madame" shops to a discerning public who required the individuality and quality associated with continental fashion houses. The rapid growth of variety chain stores, notably Marks and Spencer and British Home Stores, eroded this market by providing a high level of quality at a level of value that appealed to the British consumer, facilitated by mass production techniques. These stores, and others, marked their early success by promoting goods that were made in the UK, thus supporting domestic suppliers.

Menswear production succumbed most easily to mass production, due to standardization, particularly of shirts, hosiery and underwear. Having established a market for standardized products, imports from more distant, lower labor cost countries became feasible. Although some chains maintained their made in UK policies, others such as C&A and Burtons began to actively import, taking advantage of trade relations with countries within the British Commonwealth of Nations[4]. By the mid 1980s, several retailers ran their own overseas buying offices to manage procurement, logistics and quality.

These developments occurred in spite of protection from imports under the Multi Fiber Arrangement (MFA) that imposed quota restrictions on imports of clothing from participating countries. Quota hopping through complex import routes and sourcing from countries excluded from the MFA enabled apparel imports to grow steadily.

II.3.d Exports

While representing only a fraction of the value of imports, UK exports of textiles and clothing have been buoyant, until the recent rise in Sterling exchange rates that has been damaging to exporters. Total apparel exports in 1996 were worth £3,319 million. By 1997 apparel exports had fallen by 5% to £3,140 million[5]. This represents a deficit in the balance of trade of £3,607 million (up 24% on the previous year). The top markets for UK products are in the EU, although the USA is among the most buoyant. The UK's reluctance to join the Single European Currency could further damage export opportunities in Europe.

II.4 Comparisons with textiles

Growth in production has been slower in textiles (11% at current prices) than in clothing manufacture (14% between 1992 to 1997). However, the value of production in textiles continued to increase until 1997, even though that for clothing had apparently stabilised by that time. Some textiles sub-sectors show marked growth in output, others (notably textile finishing) have declined rapidly.

[4] Economist Intelligence Unit: Sector Report, 1991.

[5] Drapers Record 31.5.1997

The most notable difference in performance between the textiles and clothing sectors is the more rapid growth in value-added per head in textiles. This is a result of the economies of labour and porduct developments achievable in textiles through R&D and investment in new technology. Clothing manufacture remains a labour intensive sector, a situation exacerbated by the recent tendency for smaller production runs that defy traditional economies of scale and automation.

Import penetration in textiles is similar to that reported in apparel (55%). Imports are drawn from a variety of sources, and some sourcing is dictated by circumstances such as location of garment manufacture (for imported or outward processed goods), availability of OPT (which requires the use of EU sourced fabrics) or technical innovations. However, textiles manufacturers in developing countries are reputed by buyers to be less risk averse and more open to technological innovations than their UK counterparts. Price, although significant is only one of a number of sourcing influences on the sector.

II.5 Trends in the Labour Market

II.5.a Employment

The apparel industry employs a total of 160,000 people in approximately 6000 firms; a further 170,000 are employed in textiles and knitted outerwear manufacture. Between 1970 and 1980, almost 25% of jobs in the apparel sectors were lost and employment declined by a further 25% between 1980 and 1990 (table 2.8).

The Annual Employment Survey suggests that employment in textiles fell by 17,000 jobs (9%) between June 1997 and September 1998[6]. The clothing industry lost approximately 13,000 jobs in the same period. These figures substantiate claims by the Transport and General Workers Union that textiles and clothing is currently losing 500 jobs per week and suggest that (following a later onset of decline) textiles is particularly vulnerable to job losses.

Table 2.10 shows that it is men's wear that has born the majority of job losses. Current employment is only 30% of the men's wear total in 1960. Women's and girls'

[6] Labour Market Trends, various 1998

wear has increased in significance as a source of employment from 39% of the total to 51%.

II.5.b Earnings

Earnings within the clothing sector are relatively low compared to both the national average and the average for all manufacturing industries. For male workers average hourly earnings equate to 69% of the equivalent in all manufacturing industries. Female workers' earnings compare more favourably to the national averages, representing 83% of average manufacturing hourly (see table 2.11).

Hourly earnings for female workers are only 75% of the equivalent for men. The difference attributable to the tendency for women to occupy relatively low skilled, low waged manual jobs, such as inspecting and making-up. In garment manufacture men are more likely to be employed as cutters and pressers that attract higher hourly wages.

Comparing the index of average earnings shows that earnings in clothing have increased at a similar rate to that of the economy as a whole since 1993. However, prior to 1992 clothing sector wages were shrinking compared to those for other industries.

II.5.c Employment by region

The principal regions for clothing manufacture are The East Midlands, The North West, London and Scotland. In these areas textiles and clothing represents more than 10% of manufacturing employment and inspite of the evident decline, these regions remain heavily dependent upon the sector. Table 2.12 illustrates the distribution of employment across regions.

II.5.d Brief comparisons with textiles

One of the most significant differences between textiles and clothing is the extent to which the textiles sector has been able to replace labour intensive activities with new technology. Employment in textiles has, therefore fallen even more dramatically than that in clothing. However, following a period of intense competition that has encouraged textiles companies to invest, more recent changes have involved companies migrating overseas to provide local sources of upstream supply to their core customers (garment manufacturers). The pace of decline in textiles has therefore accelerated.

Unlike clothing, the textile sector employs more men than women (table 2.13) and a higher proportion of full time workers. This is partly attributable to the greater investment in training by both companies and individuals, and the requirement to ensure that expensive equipment is utilised to capacity. Similarly, average earnings in textiles exceed those in clothing manufacture.

Regionally, the textiles sector shares some major concentrations in the East Midlands, North West and Scotland. Yorkshire and Northern Ireland are also major producers. London, however, has only a small textiles sector, specialising instead in clothing manufacture.

II.6 Trends in Industry Structure

II.6.a Numbers

The number of enterprises within the sector has fallen since the 1950s, as companies underwent a period of acquisitions and mergers, and the level of imported goods began to rise. At this time the average size of enterprises within the sector exceeded 60 employees. However, in the mid 1980s, a new wave of small enterprises was established, creating a mass of over 9000 businesses with an average size of just 25 employees.

Since then, the size of firms has remained relatively stable, although their numbers have been in decline until 1994 (table 2.14).

II.6.b Size distribution

The sector is dominated by small firms, with at least 95% of enterprises employing fewer than 100 workers, and 81% employing fewer than 25 staff, as shown in table 2.15. However, homeworking is also an important component and in some regions characterized by small subcontracting firms could boost employment figures in these local industry concentrations by as much as 50-100% at peak times.[7]

II.6.c Employment distribution by size of firm

As a result of take-overs and mergers, a concentration of the largest and smallest firms emerged post war. Between 1950 and 1980, the share of employment increased in both the largest and smallest firms in the industry. Firms employing more than 1000 accounted for 6% of jobs in 1950, 18% in 1960 and 29% in 1980. The corresponding figures for firms employing fewer than 100 employees are 29%, 34% and 35%.

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[7] Anabelle Jackson and Associates, Report on the Structure of the Birmingham Clothing Industry, 1996.

II.6.d Capital investment

The clothing sector is regarded as a low capital investment sector. On average, enterprises spent £13500 on capital investment in 1995. Data suggests that this figure had increased since the early 1990s. Capital investment accounts for just 1.8% of gross output for the sector and equates to expenditure of just £600 per person employed.

II.6.e Brief comparisons with textiles

The textiles sector is represented by fewer enterprises, although these tend to be of larger average size (currently 30 employees). As figure 2.16 shows 53% of textiles workers work in companies employing 200 or more. This compares to just 40% in apparel manufacture.

Capital investment in the textile sector is much higher. One average firms invested £50,000 in 1995 (3.3% of gross output and equivalent to £1780 per employee, almost three times as much as apparel companies). The high investment costs of the textile sector have posed a barrier to entry for small entrepreneurial businesses, and the sector has not been affected by the start up of small businesses as the clothing sector.

II.7 The Changing Organisation of Work

The development of different production systems is explored more fully in section II. However, to give an overview, it is currently apparent that an increasing amount of production is being moved to overseas locations. For apparel workers this has meant loss of jobs and for companies a need to identify competitive advantages other than price and the economies of scale on which to trade. Those companies that remain in the UK have restructured to provide one of a range of competitive strengths. These include quick response or flexible manufacturing of very small volumes. Just in time manufacturing to reduce inventory or a range of specific services, such as design, logistics or reprocessing that fit into a global production channel. The implications for the organisation of work include:

- Greater emphasis on multi-skilling and flexibility;
- Peaks and troughs in employment on a sub-seasonal basis;
- A greater requirement for specialist skills, such as marketing, sourcing, production management, IT, logistics, rather than making-up;

II.8 The Regulatory Institutions of the Industry

II.8.a The industrial relations system

The UK clothing sector has a relatively low Trade Union Membership, around 33% (1990). The sector is currently represented by three main Trade Unions: the Transport and General Workers Union (TGWU), The General and Municipal Boiler Makers Union (GMB) and the Knitting, Footwear and Allied Trades Union (KFAT). The latter is the only dedicated union, the others representing workers in diverse sectors. Challenges to Unionisation include the migration of factories to non-traditional production areas in the 1950s, the preponderance of small firms, many of which operate informally and the high proportion of female and ethnic minority workers.

Employers in the sector are represented by the British Clothing Industry Association and the Knitting Industries Federation. These are united as the British Apparel and Textile Confederation which bargains on behalf of its membership, that represents a significant proportion of the industry's workforce, albeit concentrated in large firms.

The Employers Association and Trade Unions participate in collective bargaining arrangements, currently estimated to cover 40% of the textiles and clothing workforce. However, due to the structure of the sectors, clothing workers are under-represented. A survey in 1980 estimated that approximately 46% of clothing sector pay bargaining was covered by multi-firm arrangements, 14% was governed by the Wages Councils and 37% was workplace specific[8]

II.8.b Minimum wages

In April 1999, the Government introduced a National Minimum Wage, set at a hourly level of £3.60. Although this is well below the average hourly wage within the sector, some garment workers will be affected. The minimum wage is an average wage that is to include piece rates and incentive payments and is not sector specific.

The garment industry has a long tradition of Wage Legislation, however, and the sector's history of low pay regulated by Wages Councils has done little to improve its image. Wages Councils were established for the sector in the inter-war years, and in 1970 there were 15 specific Councils representing the sector. These comprised of employers, employees and academic and legal advisors. In 1980, seven of the existing Councils were amalgamated to form the Clothing Wages Council, which was charged with influencing piece rates, hours of work and minimum fallback rates to non-unionised companies in line

[8] SSRC: Workplace Industrial relations Survey, 1980

with collective bargaining agreements. Wages Council directives were often ignored by unscrupulous employers, as paying low wages is seen as a means of undercutting competitors to gain business (In 1976 40% of companies inspected were found to be underpaying). The Council has had no power to impose wage rates since 1991. Critics suggest that those companies determined to undercut wage directives will continue to do so, in some cases as a survival strategy.

II.8.c Other Governmental regulation

Various other legislation has come into force in 1999, in line with EU regulations. These include the Working Time Directive that limits overtime hours and legislation to ensure that part-time workers and casual staff are offered equal benefits (such as holiday and maternity leave) as their full time colleagues. This will undoubtedly have some effect on an industry dominated by female employees.

In addition, companies are also increasingly responsible for ensuring that their employees are entitled to work in the UK if they are not UK citizens. This legislation has had some effect in sectors of the industry that are dominated by ethnic minorities, in some cases leading to compulsory closure, and in some regions has created skills shortages because of a lack of legitimate workers.

Other legislation involves Value Added Tax, for which most firms must be registered. Tax avoidance is one of the most frequent reasons for small firm closure, and it is not uncommon in the garment industry for so-called Phoenix businesses to close when their tax burden becomes pressing, only to restart as a *new* business in neighbouring premises.

Tables: Section II

Table 2.1 UK Manufacturing Output of Apparel by Value

Women's and girls outerwear	29%
Men's and boys outerwear	16%
Underwear and lingerie	16%
Knitwear	13%
Hosiery	8%
Workwear	4%
Leather clothing	0 1
Other apparel and accessories [9]	13%

Table 2.2 Apparel Sector: Gross output (real values £ 1993)

	Gross output (£ million)	**Net output / head (£)**
1995	5925	14979
1994	5683	17160
1993	5312	14186
1991	5148	14475
1986	6057	12652
1981	5362	9746
1970	4916	7615
1963	4449	5920
1958	4349	4354
1950	5222	5247
1935	2539	3109
1924	1926	2665
1907	2180	2089

Source: Business Monitor, PA series, UK Census of Production, various

Table 2.3 Added-Value

	Added-Value	Added-Value per	Added-Value as %

[9] including infants' wear, hats, gloves, etc. Source: BATC Trendata 1995 / Taylor Nelson

		head	Gross Output
1995	2234	12300	38
1994	2353	13865	42
1993	2172	11829	41
1990	2515	12372	44
1987	2498	10835	42
1985	2399	10131	42
1981	2219	8025	42

Table 2.4 Gross output (£ million, 1993 prices)

SIC code	Men'swear	Women's and children'swear
1995	1646	3142
1994	1593	2818
1993	1556	2346
1991	1368	2269
1986	1447	3079
1981	1273	2733
1970	2322	2595
1963	2173	2276
1958	2174	2175

Source: Business Monitor, PA series, UK Census of Production, various

Table 2.5 Net output / head (£ 1993)

	mens outerwear	womens / childrens outerwear	mens shirts / underwear	womens / childrens light outerwear, lingerie & infantswear
SIC code	*18221*	*18222*	*18231*	*18232*

1995	19400	15696	12782	12440
1994	20165	19973	n/a	14149
1993	17388	14407	12066	13102
SIC code	*4532*	*4533*	*4535*	*4536*
1991	13488	15706	14168	13318
1986	11422	12942	11107	12433
1981	10030	10894	9841	10967
SIC code	*442*	*443*	*444*	*445*
1970	7343	8637	6696	7828
1963	5653	7123	5476	5738
1958	4911	6075	4413	5024

Table 2.6 Import penetration: apparel,

	1997 £ million	1998 first half £ million
Output	7,972	3,855
Exports	3,143	1,333
Imports	6,750	3,209
Apparent Consumption	11,579	5,731
Balance of trade	- 3,607	-1,876
Import penetration	58.3%	56.0%

BATC Trendata, 1998

Table 2.7 Import Penetration: Men’s wear and Women's wear

	Men’s wear	Women's wear	Total
1960	5%	9%	7%
1970	11%	6%	8%
1980	n/a	n/a	18%
1985	30%	25%	27%
1991	44%	42%	43%
1994	55%	42%	48%
1996	n/a	n/a	57%
1997	n/a	n/a	58%
1998*	n/a	n/a	56%

Source: UK Overseas Trade Statistics; UK Census of Production
**first half year*

Table 2.8 Index of Outward Processing Prior Authorization

	value (£ 1991)	Index 1991 = 100
1991	608539	100
1992	1569569	258
1993	5417145	890
1994	11500000	1889

Source: DTI Import License Branch (quoted in MMU, 1996)

Table 2.9 UK Textiles and Apparel Employment, 1985 to 1995

Employment	Clothing	All Textiles Sector (including clothing, knitwear, textiles)
1960	397	
1970	357	970
1975	341	874
1980	276	627
1982	222	222
1983	214	214
1984	228	228
1985	237	496
1986	235	235
1987	231	488
1988	234	487
1989	219	463
1990	203	427
1991	181	390
1992	174	174
1993	174	375
1994	167	358
1995	181	373
1996	171	372
1997	167	354
1998*	159	331

Standard Industry Classification of apparel and textiles changed in 1982. As a result, the employment breakdown between apparel and textiles has changed between 1980 and 1985.

* *estimate based on Annual Employment Survey (from Labour Market Trends) 1998. 1987 to 1997 based on ONS data cited in Business Monitor Annual Survey of Production, Summary Volume, various and BATC estimates cited in Trendata, various.*

Table 2.10 Employment in Men's and Women's wear

Employment	Women'swear	Men'swear	Other

1960	155	39%	172	43%	70	18%
1970	142	40%	148	41%	67	19%
1975	153	45%	135	40%	53	16%
1985	113	48%	76	32%	48	20%
1986	115	49%	79	34%	41	17%
1987	107	46%	83	36%	41	18%
1988	108	46%	83	35%	43	18%
1989	101	46%	80	37%	38	17%
1990	93	46%	74	36%	36	18%
1991	81	45%	66	36%	34	19%
1993	88	51%	51	29%	35	20%
1994	83	50%	49	29%	35	21%
1995	93	51%	50	28%	38	21%
1996	83	49%	50	29%	38	22%
1997	81	49%	50	30%	36	22%

Table 2.11 Textiles and Clothing Sector Earnings

	All Manufacturing		Clothing		Clothing As % of Manufacturing Wage	
	Male	Female	Male	Female	Male	Female
1970	179.22	286.05	143.64	80.87	80	94
1980	229.07	136.78	174.07	116.8	76	85
1985	252.26	149.15	185.36	125.46	73	84
1986	253.33	151.94	183.18	126.23	72	83
1987	263.86	157.04	185.75	128.61	70	82
1988	277.11	162.41	195.23	135.21	70	83
1989	284.23	166.62	194.18	139.31	68	84
1990	287.57	171.34	201.42	143.13	70	84
1991	274.75	164.81	190.3	134.24	69	81
1992	293.8	172.22	175.86	140.08	62	81
1993	281.5	172.91	188.12	140.6	67	81
1994	284.69	174.54	190.41	141.21	67	81
1995	296.27	183.94	201.69	150.72	68	82
1996	302.67	188.48	208.05	156.75	69	83

Source: New Earnings Survey.

Table 2.12 Employment by Region

Government Office Region	thousands	Percentage of total
North East	8.4	6%
North West	18.6	13%
Merseyside	2	1%
Yorkshire	12.9	9%
East Midlands	26.2	18%
West Midlands	13.1	9%
Eastern	5.4	4%
London	18.6	13%
South East	3.2	2%
South West	5.4	4%
Wales	6.8	5%
Scotland	13.5	9%
Northern Ireland	11	8%
UK Total	145.1	

Annual Employment Survey, 1997: Labour Market Trends, February 1998

Table 2.13 Male and Female Employment

	Male			Female		
GB thousands	Full Time	Part time	All	Full time	Part time	All
Clothing	31.8	1.9	33.7	77.7	22.6	100.4
% total	24%	1%	25%	58%	17%	75%
Textiles	90.5	2.3	92.9	64.9	11.5	76.4
% total	53%	1%	55%	38%	7%	45%
All industries	10246	1387	11634	6131	5080	11212
% total	45%	6%	51%	27%	22%	49%

Annual Employment Survey, 1997: Labour Market Trends, February 1998

Table 2.14 Apparel Manufacturing Enterprises and Average size

Year	**Number of enterprises**	**Average Firm Size**
1924	6320	64.6
1935	5844	75.8
1950	8989	44.5
1960	4921	63.1
1970	5595	63.8
1980	6736	41.1
1985	9252	25.6
1986	9647	24.4
1987	9233	25.0
1988	9098	25.7
1989	8927	24.5
1990	8390	24.2
1991	7841	23.1
1992	7283	23.8
1993	7499	24.5
1994	7917	21.4
1995	8399	21.6

Source: UK Census of Production, various years; Business Monitor, Size Analysis of UK Businesses, 1992 to 1995.

Notes: Data relates to woven clothing manufacturing only, eliminating knitwear which is included in the apparel figures of table 1.4. Data for 1960 refers to principal garment manufacturing subsectors only, i.e. manufacture of women's and girls tailored outerwear, men's tailored outerwear, women's and girls underwear, men's shirts and underwear.

Table 2.15 Size of UK apparel businesses (1995)

size of business (number employees)	1-9	10-19	20-49	50-99	100-199	200-499	500 +
% businesses	71	13	10	3	1	1	.4
% employed*	8.8	5.3	13	14.3	20.4	28.7	9.6

** distribution of employment extrapolated from 1994 Size Analysis of UK Businesses, Business Monitor*

Source Business Monitor: 1995 Size Analysis of UK Businesses

Table 2.16 Size of UK textile businesses (1995)

size of business (employees)	1-9	10-19	20-49	50-99	100-199	200-499	500+
% businesses	64	13	11	5	4	2	1
% employed*	4.5	3.3	9.5	12	17.8	25.9	26.2

** distribution of employment extrapolated from 1991 Size Analysis of UK Businesses, Business Monitor*

Source Business Monitor: 1995 Size Analysis of UK Businesses