Appendix A

Statistics in the UK Clothing Sector and the PRODCOM System

The majority of UK official industrial data are published using a system of categorisation based upon the Standard Industrial Classification (SIC). Unfortunately, for those users of statistics who are interested in plotting trends over time, the SIC is periodically revised – we have had a SIC (1968) and a SIC (1980), for example. We now have a third variant in existence – SIC (1992). The problem introduced by the change from one system to another is that the categories within each system frequently do not correspond with any degree of exactitude. It is, therefore, quite difficult to produce time series data which involves a change from one system to the next without encountering a break in the series.

At the present time, another significant change is taking place with the introduction of the PRODCOM system. This is a Europe-wide system of data collection based upon manufacturer product sales enquiries. PRODCOM is a European Community-wide initiative to harmonise the *collection and publication* of data about *products*. The great advantage of PRODCOM is that it will provide a definitive list of products (and data about them) which directly links to international trade data. It will, therefore, provide *direct compatibility* between production and trade data for the twelve EU Member States. It may be worthwhile to expand briefly upon the significance of this change.

In the past, UK production data were collected on an *industry* basis (and based on the relevant SIC at the time), whereas trade data were collected on a *commodity* basis (and based on another categorisation system, the Standard International Trade Classification (SITC). There was no guarantee that commodities would always be placed within what, on a common sense basis, would seem to be the appropriate industry. Additionally, some categories appearing separately in one system might be included as part of a wider category in the other, e.g. a male child's product in one might be hidden in men's wear in the other. Finally, it was possible for double counting to appear, e.g. if a firm

making knitted fabric also used it to make a shirt, the shirt would appear in the statistics of the knitting industry, which in the SIC is a separate category from clothing. If, however, the fabric were sold to a clothing manufacturer, it would appear twice – once as a product of knitting and once as a product of clothing.

The new PRODCOM system uses codes which are derived from the new SIC (1992). This means that while data contained in previous *Business Monitors* was grouped into SIC (1980) industries and product headings which were all UK specific, the new PRODCOM product list actually groups data by reference to SIC (1992) and makes them compatible to data from all other EU states. Finally, because the PRODCOM headings have been based on the trade nomenclature (CN) classifications, almost every PRODCOM product code links to one or more CN code. Therefore, production and trade data should in theory be capable of being matched up with few problems. The match, in practice, is not perfect either with the SITC, CN or the MFA categorisation system, but it is a substantial move in the direction of direct comparability.

The new SIC (1992) which defines clothing is 18 'Manufacturing of Wearing Apparel; Dressing and Dyeing of Fur'. This breaks down as follows:

18.1	Manufacture of leather clothes.
18.10	Excludes gloves and belts which go into 18.24/2 and sports gloves and headwear which go into 36.40).
18.2	Manufacture of other Wearing Apparel and Accessories.
18.21/0	Workwear (excludes footwear (19.30) and safety headgear (25.24; 28.75)).
18.22	Manufacture of other outerwear.
18.22/1	Men's outerwear.
18.22/2	Other women's outerwear (includes suits, ensembles, jackets, dresses, slacks, skirts etc.).
18.23	Underwear.
18.23/1	Men's underwear (includes shirts, t-shirts, briefs, pyjamas etc.).
18.23/2	Women's underwear (includes blouses, slips, lingerie, brassieres, nightdresses etc.).
18.24	Other wearing apparel.
18.24/1	Hats.
18.24/9	Other (includes babywear, tracksuits, swimwear, gloves, belts, ties etc.).
18.3	Fur.

Knitted and crocheted hosiery and other articles of apparel (pullovers, cardigans etc.) are classified in textiles in 17.7.

Readers who were familiar with SIC (1980) will immediately see that there are substantial differences between the two systems. In the 1980 system, the clothing and footwear industries were given the number 45. Footwear was 451, while the clothing, hats and gloves sector was given the number 453. (Hosiery and knitted goods were in textiles (43) – in 4363 and 4364.) It was, I believe, accepted practice to regard mainstream clothing industry as being best indicated by 453.

453 was broken down into:

4531 Weatherproof outerwear.
4532 Men's and boys' tailored outerwear.
4533 Women's and girls' tailored outerwear.
4534 Work clothing, men's and boys' jeans.
4535 Men's and boys' shirts, underwear and nightwear.
4536 Women's and girls' light outerwear, lingerie and infants' wear.
4537 Hats.
4538 Gloves.
4539 Miscellaneous dress industries.

How does the new SIC (1992) (and, by implication PRODCOM) match up to the old SIC (1980)? The following linking system has been supplied to us by CSO, Newport. This would imply that to get data under SIC (1992), which could be compared in a time series to data previously collected under 453 (SIC (80)), we should use 18.2 SIC (92). That does not seem to present too great a problem.

If we had, for example, produced a run of data for men's and boys' tailored outerwear (SIC (80) 4532), and we wished to continue this series under SIC (92), things would look more difficult. Other men's outerwear (18.22/1) seems to be the nearest category. We could add up 4531, 4532 and 4534 and call this the equal of 18.22/1, the present author supposes, but 4531 also appears in 18.22/2 while 4532 appears in 18.21, as does 4534. It is currently not possible to estimate what proportion of each SIC (1980) is related to each SIC (1992). There seems, therefore, to be no easy way to achieve a 'watertight' match at the sub-industry level.

Finally, it should be noted that CSO does publish an index to the SIC (1992), which details the links between the SIC (1980) and the SIC (1992). This is available from HMSO.

SIC (92)	SIC (80)
18.21	4532 4533 4534 4536
18.22/1	4531 4532 4534
18.22/2	4363 4531 4533 4536
18.23/1	4363 4535 4539
18.23/2	4363 4536 4539
18.24/1	4363 4537 4560
18.24/2	4310 4322 4363 4395 4531 4535 4536 4538 4539

Appendix B

Employment and Output Statistics

Output data: manufacturing of wearing apparel (SIC Division 18)

Base year 1995 = 100

Year	Index figure
1978	108.9
1979	110.9
1980	99.9
1981	92.6
1982	93.4
1983	96.5
1984	102.3
1985	109.4
1986	109.7
1987	110.7
1988	109
1989	105.3
1990	106.2
1991	95.9
1992	98.5
1993	98.2
1994	102.7
1995	100
1996	102.1
1997	92.7
1998	82.9

Source: Private correspondence with ONS.

Notes: The research required to generate this table was carried out by Nicola Robinson and funded by MMU, Hollings Faculty.

Employment data: manufacture of clothing

Year	September figures (000s)
1978	294,157
1979	292,905
1980	258,074
1981	228,486
1982	216,913
1983	213,380
1984	214,380
1985	220,131
1986	215,214
1987	216,874
1988	216,501
1989	206,940
1990	187,210
1991	156,771
1992	147,044
1993	154,823
1994	149,056
1995	144,575
1996	140,674
1997	134,037
1998	123,841
1998 (Dec)	118,547
2000 (March)	104,300
2001 (Nov)	95,000

Source: Private correspondence with ONS. Latest figure from Labour Market Trends.

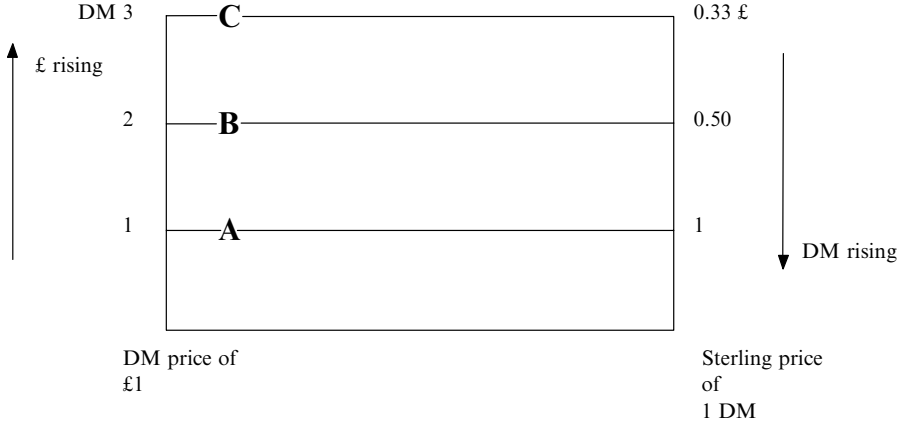
Notes: The research required to generate this table was carried out by Nicola Robinson and funded by MMU, Hollings Faculty.

Notes on sampling procedure

It is important to realise that both sets of data are produced from samples. The primary data source for the output data is the Monthly Production Inquiry of Manufacturing Industries. This is taken from a sample of approximately 6% of the businesses in the sector covered. Large companies remain in the sample, but smaller ones are rotated. The data covers only output physically produced in the UK (i.e. it does not include OPT data – see Chapter 8). The employment data is derived from the Annual Employment Survey which covers approximately 30% of the work sites in the UK. It is important to realise that the employment figures – although appearing very precise – are not based on a head count or a procedure similar to the Census of Population. The sample of firms supplying data is not constant over time and the figures from each size band which supplies data are weighted according to the importance of the size band they represent.

Appendix C

A Model of Exchange Rate Fluctuations



Notes: (1) DM represents German currency; £ represents UK currency.

(2) On the left scale at A it costs 1 DM to buy £1. At point C it costs 3 DM so that each DM is buying fewer £s. Therefore, the DM is falling and the £ rising.

(3) On the right scale at A it costs £1 to buy 1 DM. At point C it costs 33p. This means that at C it costs less to buy each DM and that each £1 spent purchased more DMs. Therefore, the £ is rising and the DM is falling.

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