InterTradeIreland

TRADE & BUSINESS DEVELOPMENT BODY

CLOTHING & FOOTWEAR

An Ireland retail perspective

NOVEMBER 2000

Apparel sector averaging double digit growth.

Go forth and multiply – impact of UK multiples.

Consumers dress down.

Putting fabrics first.

Designed at home, sourced world-wide.

Contents

This publication has been produced by:
InterTradeIreland, Enterprise Ireland, LEDU and IDB for Northern Ireland.

Topline Summary

Market size

The retail clothing market in Ireland was worth IR£3.4bn in 1999, or £2.7bn sterling at retail prices, and has grown by 59% since 1995. The Republic's clothing market has almost doubled in size within that period (+75%), while NI has grown 27%.

The high growth in the clothing market can be explained by the increasing amounts of imports (+45% in 5 years) coupled with the UK multiples continued expansion in the Irish market.

Northern Ireland accounts for Stg£0.7bn at retail prices or 26% of the total market, against IR£2.5bn in the Republic.

The market is forecast to grow by 19% end of 2001 with the market in the Republic projecting 20% growth against 16% in Northern Ireland.

Segmentation

The largest segment of the Irish apparel market is ladieswear which accounts for almost IR£1.1bn in 1999, or 33% of total sales. Within ladieswear a number of significant sub segments exist including knitwear, casualwear, tailoring, teen high fashion and outsize. These are addressed in the relevant sections.

Menswear is worth IR£756m or 22% of the market. Footwear accounts for a further 18% or IR£619m, and childrenswear, lingerie and accessories follow with 14%, 8% and 5% respectively.

Product trends

In general terms, Irish fashion has integrated with European and international trends. It has become increasingly difficult to define an Irish look, beyond the obvious stereotypes of Aran sweaters and tweeds.

In the last 3-4 seasons the directional trends have been less structured – in other words soft tailoring, casual, layering, uncoordinated clothing has displaced the tailored co-ordinated look. This trend is true of womenswear, menswear and childrenswear.

Manufacturing

Irish manufacturers share of the home market is estimated to be between 10-12% in 1999/2000 or between IR£350-400m at retail prices, with the balance of supply being imported. According to LEDU and Enterprise Ireland, there are an estimated 350 firms (north and south) involved in the sector, and the majority are small family owned and managed business.

Despite the buoyant market conditions, design capability, skills shortages and escalating labour costs remain key barriers to the development of the clothing sector on both sides of the border.

‘Quality and value for money (not price) are the main criteria we use in selecting suppliers.

Dunnes Buyer

Retailing

The UK multiples have a 65% share of the NI retail clothing market and further scope for expansion is thought to be limited. By contrast the UK multiple share of the Republic’s clothing market is much smaller at 30%, with the balance of trade being shared between Irish multiples (Dunnes, Sasha, etc) and independent retailers.

Advertising and marketing

Irish clothing retailers are the biggest spenders on advertising. Total expenditure grossed over IR£5m in 1999.

Key channels include the women’s fashion magazine press and some limited TV advertising by both multiples and larger independents to promote special events.

Web site development by both manufacturers and retailers is still in its infancy.

By comparison with European/American brands, Irish brand support at the point of sale (display, merchandising units and promotional brochures) is limited or non-existent.

Future opportunities

The outlook for clothing retailing in Ireland remains positive with 19% growth projected to 2001. The best prospects are in ladieswear, childrenswear and accessories.

During the research period the following opportunities were identified.

- Knitwear – both contemporary and traditional design influenced styles have further development potential in both fabric and format.
- Special occasion wear – for the 25-50 year old age group in contemporary ranges and more expensive fabrics. Brands should be aimed at the independent middle market retailer.
- Strongly branded Irish based menswear or womenswear lines have potential provided they are manufactured competitively and are well supported from a design, marketing and distribution perspective.
- Mid to high end children’s brands.
- Classic bags, leather goods and accessories/luggage which can draw on equestrian/traditional heritage.
- Other accessories such as silk/hand-printed scarves, specialist hosiery, and better end lingerie/nightwear lend themselves to the Irish supply base capability.
- Functional clothing such as wax jackets, fleeces, fisherman’s smocks, hats and shawls have in-built credibility with a made in Ireland label and have export as well as domestic market appeal.

Market Size

The Irish Clothing market has grown by 59% since 1995, and PwC estimate that the all Ireland Clothing market was worth IR£3.4bn in 1999 or Stg£2.7bn at retail prices.

Northern Ireland accounts for Stg£0.7bn or 25% of the total market, against IR£2.5 in the Republic.

1. Source: Market Opportunities Report (ABT/IDB/IFI)
2. CSO household consumption figures estimate the ROI clothing and footwear market was worth IR£2,054m in 1997.
3. PwC's latest market size estimates are based on in-depth analysis of available statistics, a review of the current manufacturing/supply base and face to face retail interviews throughout the country.
4. Stg£1 = IR£1.2775
5. Figures have been rounded up

Market Size

	1994[1]		**1997**[2]		**1999**[3]		**% 5 year change**
	£m	IR£m	£m	IR£m	£m	IR£m	
NI	559	714	629	804	712	910	27
ROI	1130	1444	1618	2067	1978	2527	75
Total	**1689**	**2158**	**2247**	**2871**	**2690**	**3437**	**59**

Trade sources have suggested that the market size figures for 1995 (Market Opportunities Ireland) may have been slightly low. This, coupled with the rise in imports since 1998 and the ever increasing multiple presence in the all Ireland market, has affected the growth and value of the Irish clothing market.

The ROI clothing market has grown at a staggering rate of 75%, while the NI market grew by 27% between 1994–1999.

The NI market is growing at a steady 6% per annum, while the ROI market is booming with an average growth of 15% per year in the past five years.

In recent years the growth of the Celtic Tiger and the increasing presence of multiples has contributed to the high ROI growth. The following table highlights import and export figures for the ROI market. Regional figures for NI are not published separately and are included within the UK statistics.

Imports to the Republic grew by 45% between 1994-1999 to IR£1.04bn. The largest growth was experienced in men's and ladieswear sectors, followed by lingerie.

Exports from the ROI declined by 17% to IR£0.3bn during the same period. Almost half of exports from the ROI are to Great Britain, 15% are to Northern Ireland and 11% to Germany.

In value terms ladieswear is the most important export from ROI at almost £77m in 1999 and has grown by 44% since 1994. Exports of accessories and hosiery items increased by almost 56% between 1994 and 1999.

Northern Ireland's Strategy 2010 report estimates the NI apparel sector to be worth £540m of which up to £80m is sold in the home market, and £460m is exported, mainly to Britain.

Ireland based manufacturers (including NI) account for 10-12% of the all Ireland market (IR£350-£400m at retail prices). The largest proportion is in the ladies wear sector.

Factors affecting growth

The clothing industry is influenced by a variety of factors. Recent growth in the Irish market can be largely attributed to the health of the economy, changes in the distribution structure (entry of UK multiples) and the heightened consumer interest in the clothing sector as a result of media, youth culture and international designer influences.

The health of the economy

The Republic of Ireland has experienced a sustained period of exceptional economic growth in the last five years with annual GDP growth of up to 8%. Despite recent EU Central Bank concerns about inflation levels, a soft landing for the Irish economy is predicted with further GDP growth of 7% in 2000. Significant numbers of expatriates are returning to Ireland to experience the new prosperity and are increasing the numbers of households. Further detailed analysis of Ireland's economic performance is available at www.esri.ie.

ROI Import/Export Statistics 1994-99 (IR£000s)

	1994	1995	1996	1997	1998	1999	6 year change (1994-99)
Imports							
Menswear	137,462	139,081	174,221	188,421	201,279	219,490	60
Ladieswear	156,691	165,496	197,399	223,774	238,149	257,657	64
Footwear	194,010	156,176	169,670	164,635	178,986	190,415	(2)
Accessories & hosiery	61,708	56,235	71,935	81,803	89,658	82,117	33
Lingerie	30,478	29,415	32,124	35,120	45,600	47,077	54
Other	22,194	18,185	19,400	21,678	25,170	27,952	26
Knitted Goods[1]	118,540	116,709	137,296	162,713	239,689	221,100	87
Total	**721,083**	**681,297**	**802,045**	**878,144**	**1,018,531**	**1,045,808**	**45**
Exports							
Menswear	67,911	69,270	75,843	68,927	65,349	58,487	(14)
Ladieswear	53,318	53,928	71,506	82,344	84,341	76,974	44
Footwear	63,535	27,892	26,999	20,492	16,451	19,500	(69)
Accessories & hosiery	36,435	32,038	37,963	41,728	48,221	56,765	56
Lingerie	29,257	28,535	28,887	24,577	29,421	25,645	(12)
Other	3,155	1,633	2,334	2,380	3,429	4,240	34
Knitted Goods[1]	127,776	127,499	111,034	104,605	107,893	74,906	(41)
Total	**381,387**	**340,795**	**354,566**	**345,053**	**355,105**	**316,517**	**(17)**

Source: CSO Business Monitor

1 Knitted Goods include T-Shirts, Jumpers and other knitted apparel

* Figures rounded up where appropriate

Northern Ireland's economic performance is more closely related to that of Great Britain, and in recent years the relative political stability has improved business confidence in the region. Between 1999/2000 the economy grew at 2.1% and this is expected to grow to 2.8% in the current year. In-depth analysis on Northern Ireland's economic performance and outlook is available at www.pwcglobal.com or www.nisra.gov.uk

Changes in the distribution structure

The major change in the Republic has been the arrival of specialist UK multiple chains in ladieswear, menswear and footwear to join established department stores such as Marks and Spencer. Examples include Jigsaw, Warehouse and Principles. UK multiples have focused on key cities such as Dublin, Belfast, Londonderry, Cork and Galway. Their expansion into regional towns in Northern Ireland such as Ballymena and Lisburn is at a more advanced stage than in the Republic where independents and Irish Multiples still command 70% share between them.

Market Size By Retail Outlet

Category	NI Share (%)	ROI Share (%)
UK Multiples	65	30
Irish Multiples	12	28
Independents	23	42

Source : PwC Estimates

Independent retailers have reacted to the Multiples by 'trading up' through refurbishment programmes and by increasing the floor space available to branded offers. This has offered a 'new look' to many established shops who have diversified in product offering or focus. Family owned department stores in Ireland are also undergoing a major revamp and allocating more space to individual brands and concessions. In-store customer services have improved and offers include finance, banking & mortgage facilities, restaurants, beauty & hair salons and mail order catalogues.

Up and coming European brands such as Mango, Hennes & Mauritz (H&M), Kookai and French Connection now have growing presence in the Irish clothing market either as independent retailers or within department stores.

The growing interest in fashion ranges by the consumer has also been fuelled by the arrival of TV shopping channels such as QVC and internet based clothing outlets. UK examples include Shopsmart and Dressmart and on-line shopping television programmes with growing popularity such as 'She's Gotta Have It' are helping the average consumer become more fashion conscious. Arnotts are also developing a strategy to sell online and deliver goods countrywide to consumers on a same day or next day basis.

'The best of the Irish are very good, just behind the Germans.

Houstons, John Houston

Irish designer influence

Department stores such as Brown Thomas and subsidiary A-Wear, Arnotts, Clerys, Debenhams and independents such as Menarys and Houstons are all taking advantage of working with quality designers to promote certain ranges of clothing.

This highlights the growing sophistication of the middle market Irish consumer.

Designers working with retailers include Jasper Conran, Lulu Guinness and Phillip Tracey, who have produced ranges for Debenhams and John Rocha, Louise Kennedy, Marc O'Neill, Quin and Donnelly, Michelle O'Doherty, and Paul Costelloe, who supply ranges on an exclusive basis to selected retailers throughout Ireland.

This trend is visible in both the multiple and independent sectors of the market and, although it is focused on womenswear, some menswear and childrenswear collections are also available.

Market Segmentation

The clothing market in Ireland divides into the following key segments: menswear, ladieswear, footwear, childrenswear, lingerie and accessories & hosiery.

Based on discussions with key clothing retailers at the time of this review, the table below highlights how the Irish market is segmented.

Market Segmentation

Key segments	NI		ROI		Total		% of market
	£Stgm	IR£m	£Stgm	IR£m	£Stgm	IR£m	
Menswear	156	199	435	557	591	756	22%
Ladieswear	235	300	653	834	888	1,134	33%
Childrenswear	100	128	277	353	377	481	14%
Footwear	128	164	356	455	484	619	18%
Lingerie	57	73	158	202	215	275	8%
Accessories & hosiery	36	46	99	126	135	172	5%
Total	**712**	**910**	**1,978**	**2,527**	**2,690**	**3,437**	**100**

Based on 1999 figures
Source: PwC estimates
Stg£1 = £1.2775
Figures have been rounded up

Ladieswear is the largest segment of the clothing market accounting for one third of the total market, Menswear follows with 22% of the marketshare. Other key segments are footwear and childrenswear, accounting for 18% and 14% respectively.

The lingerie and accessory segments have increased in recent years and are expected to continue to rise in the next 2-3 years.

The largest growth in sales over the next 2-3 years is forecast to be in the ladieswear segment, which has grown by 65% in the last 6 years and further growth of 10-12% annually is projected for 2000-2001.

A woman needs to be able to go to work, do some shopping and pick up the kids, without changing clothes. With the new unstructured look she can do it all in one outfit.

Janice Watson, Carter, Belfast

Product trends

Clothing product trends are being driven by a number of important factors:

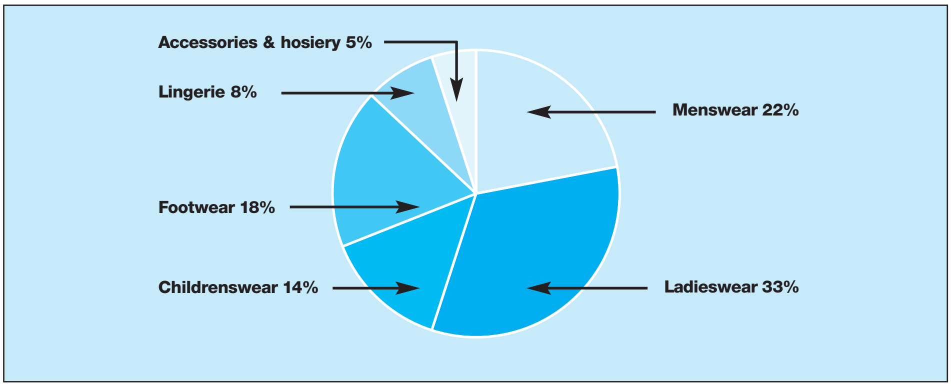
- **Higher disposable incomes:** The growth in imports and increasing number of multiples in the Irish market provide consumers with a wide range of apparel at lower prices. This enables a higher number of consumers to increase the number and value of their purchases.
- **Overseas manufacturing:** Irish suppliers have been forced to expand manufacturing operations to cheaper overseas locations such as Eastern Europe and the Far East in efforts to compete with other European Clothing manufacturers.
- **Designer fashion:** An increasing number of Irish customers in all segments of the market are becoming increasingly brand conscious, and higher priced brands such as John Rocha, Louise Kennedy, DKNY, Hugo Boss and Prada are performing well. These brands are more evident in the ladies wear and menswear segments of the market, although recently the childrenswear, lingerie and sportswear segments have seen an increase in the presence of designer brands.
- **Lifestyle trends:** Growth in the numbers of females in employment has led to an increase in popularity for trouser suits and mix and match items for the workplace. Office wear for both men and ladies has become less formal with smart casual designs such as cardigans, trousers and casual jackets now being acceptable in most workplaces.

- **Consumer confidence:** Economic prosperity, foreign travel and European influence has broadened Irish consumers' horizons, with the general trend in the workplace to dress down. Consumers are much more confident with wearing co-ordinated ranges of clothing to work rather than highly tailored suits. This trend is set to continue with many designers moving away from the tailored look and offering less structured smart/casual designs.

- **Retail Development:** UK Multiples have helped to grow the overall market for clothing and footwear in Ireland, and although many independents have been displaced by their arrival, those that survive have done so by improving their standards and moving more upmarket to differentiate themselves. A wider choice has been good news for the consumer.

Speciality stores such as Blarney Woollen Mills, Kilkenny, Avoca Handweavers, Carraig Donn and House of Ireland cater for the important ethnic tourist segment of the market.

Segmentation % by value (retail prices)



Source: PwC estimates 2000

Ladieswear

As more women enter the workforce, and many companies choose to 'dress down' in the office, a classic smart casual look with co-ordinated items of clothing has replaced the highly tailored suit and blouse. This look can be worn both in and out of the office.

Ladieswear has become less cluttered and more stylish with many designers now involved in alliances with high street retailers.

The top end of the Irish ladieswear market is dominated by leading European and American couture houses such as Armani, Calvin Klein, DKNY, Ralph Lauren, Joseph and Prada. John Rocha, Louise Kennedy, Paul Costelloe and Lainey Keogh have an international reputation and broad appeal.

German brands such as Gerry Weber, Bianca and Basler continue to have a strong presence in the local market. Dedicated boutiques for the above brands have opened in key locations in recent years.

Irish brands such as Regine, Libra, Michel Ambers, Traffic/Watercolours and Michael H are strong contenders for the middle market, and compete well with a range of German and other European brands.

The teen/fashion end of the Irish market is dominated by the UK multiples, in particular the Arcadia Group (Dorothy Perkins, Top Shop, etc), Kookai, Oasis, Miss Selfridge and Warehouse.

A-Wear and Sasha are examples of Irish retailers who have made significant in-roads in this segment of the market.

Layering of items such as tops, shirts, cardigans and jackets is very important and a style which has influenced many of the Irish designers including John Rocha and Quin & Donnelly.

'Individuality is now what women want – Individuality is the future.

Mrs Joan Dixon, Dixons, Coleraine

'Sporty look knitwear is on trend at the moment, but we have to buy abroad due to Irish supply limitations.

Blarney Woollen Mills

Knitwear

Knitwear is moving away from the traditional chunky designs to flattering modern cashmere/wool blend knits in a collection of feminine shades of pinks, blues and greens. Knitwear is fine and light, and can be worn in a layered look. The sporty look (knitwear with hoods, pockets and drawstrings) is also an important trend for 2000.

Progressive players in the knitwear scene include Fisherman, Ireland's Eye, Lyn Mar, Castle of Ireland, Deirdre Fitzgerald, Carraig Donn and Blarney.

Knitwear and pottery alliances are set to follow the designer influences in the giftware sector and recently Nicholas Mosse and Joan Millar combined the much loved patterns of the pottery to produce a new range of knitwear designs.

Menswear

Menswear sales have remained steady and, based on import sales which account for more than 85% of the market, the sector appears to be growing at just under 10% annually. The sector accounts for 22% of all clothing sales and is valued at IR£756m at retail prices.

In recent years, menswear retailers have seen a notable decline in the demand for men's formal suiting offer. Although there is still a demand for the classic tailored suit, a large percentage of sales in this segment have been replaced by softer tailored apparel in casual ranges. Italian style designs in softer luxurious fabrics are extremely popular and command a higher price point. Key menswear brands include Calvin Klein, Guess, Armani, Eterna, Peter Werth, Paul Smith, Paul Costelloe, Remus Uomo, Magee and Baumler on the tailored side and Camel, Timberland, Kickers, Tommy Hilfiger and Oxbow in the more casual jeanswear area.

Shirts and tops are also less formal and softer fabrics help to give a more casual look. Linens and cotton are popular with the younger 25-40 age range which have moved upmarket. The Irish menswear customer in the 18-35 group has become brand conscious.

Multiple retailers such as Next, Gap, Principles, Arcadia Group, Marks & Spencer and St Bernard are also key brands in the Irish menswear sector. With the exception of the Arcadia Group, these high street brands concentrate on a safer contemporary offer rather than a high fashion range, although they are currently trying to win more fashion credibility in response to declining sales.

In common with the sports trainer sector, there has been a trend for walking, climbing and surfwear brands to enter the mainstream casual/sportswear market. Popular brands include O'Neill, Oxbow, Northface and Timberland. Other sportswear brands such as Nike, Adidas and Reebok represent a dominant force in young fashion, yet these tend to be distributed through multiple sports retailers such as Champion, Lifestyle Sports or Marathon rather than through independent retailers.

This sector is expected to remain fairly buoyant over the next 2-3 years and is not expected to experience significant growth in volumes, but values may grow as a result of the impact of brand development.

Footwear

Growth of Footwear sales have remained flat in value terms over the last 5 years at around IR£619m or 18% of the clothing market.

The footwear retail sector in Ireland remains very fragmented in the regions while the multiple presence is strongly felt in the main cities (Nine West, Clarks, Barratts, DV8).

Competitive pressures have seen off most of the local manufacturers and only Dubarry remains as a significant player in the casual sports shoe sector.

Traditional men's and ladies' designs of footwear have become less popular and have been replaced with a variety of sporty casual ranges, which can be produced very cheaply in the Far East, Portugal or South America. Key brands include Clarks, Timberland, Kickers, Doc Marten, Acupuncture and Sketchers.

Sporty designs in a mix and match of fabrics including suede and lycra are popular in both men's and ladies' footwear designs. The distinction between trainers, casual shoes and walking shoes is becoming blurred and new segments within the trainer market have emerged such as:

- Sportswear (Nike, Adidas)
- Basketball (Converse)
- Fashion trainer (DKNY, Acupuncture)
- Walking (Timberland, Clarks, Pod)

Ladies shoes are now much more in line with European trends and designs including (lower heels) and a mix and match of fabrics and textures is popular.

This sector is dominated by imports and is set to continue to perform well, but offers limited opportunities for Irish manufacturers.

Childrenswear

Childrenswear sector has enjoyed modest growth of around 5-6 % over the last 5 years and is valued at IR£481m or 14% of market. Despite declining birth rates in Ireland, average spending on children's clothing is forecast to increase in the next 2-3 years to 7-8 %.

The dominant player in Irish childrenswear is Dunnes Stores' St Bernard brand, with over 20% market share. Other key multiple operators in this area include Penneys, Adams, Mothercare, Marks & Spencer, Debenhams and Next.

Beyond the affordable offer available at multiple retailer level, a very fragmented offer exists among independent retailers. Almost every small town in the country has an independent childrenswear retailer, often several and they tend to focus on better end European labels. Key brands in this sector include Premaman, Prenatal, Belart, Osh Kosh, Marese, Confetti, Buckle My Shoe, Kidcool and Mexx.

Lingerie

Lingerie sales are valued at IR£275m and account for 8% of the overall market.

Lingerie sales have grown by an average of 9% annually over the last 5 years and this pattern is likely to continue.

European and US brands dominate this segment which has seen the introduction of complementary ranges of products and strong colours in recent years. Ballet and Mamselle are two important Irish brands of note, as well as Charnos on the hosiery side.

Innovation and fabric design are the key factors of success in this segment. Contemporary designs, including the 'Wonderbra' and casual lingerie/loungewear in a variety of fabrics which have revamped the market for these products.

The 'cosy at home' sector of the lingerie market and sporty look underwear rather than feminine styles are performing well. This segment is expected to grow.

M&S dominance of the lingerie market in NI has declined in favour of Debenhams, Next and branded ranges such as Wonderbra, Charnos and Gottex.

Accessories and Hosiery

Accessories & hosiery have experienced an average growth of 6% in sales and are expected to perform better over the next two years. Growth is expected in the accessories market, yet sales in hosiery are declining due to the higher number of ladies wearing trousers both in and out of the office.

Bags and scarves are set to increase and designs are expected to be colourful yet simple. Upmarket hand-painted, silk scarves and wraps are in demand by retailers.

Modern fabrics such as lycra and linen will be often used with leather to create contemporary designs.

Key Clothing Brands in Ireland

Menswear

Upper end	Paul Smith	Ralph Lauren	Hugh Boss	Calvin Klein
	Polo Sport	**Paul Costelloe**	Bugatti	Joseph
	Tommy Hilfiger	Armani	Versace	
	John Rocha	Vicenza	Baumler	
Middle market	**Ben Sherman**	Raelbrook	Principles	Ovilenza
	Saville Row	Marlboro Classics	**Remus Uomo**	Peter England
	Magee	Next	Next	**Tricot Marine**
	Diesel	**Henry White**	St Michael	MEXX
	Oldermark	McGregor	Firetrap	Sand
	Part Two	Four Seasons	Matinique	Lacoste
	Valentino		Sonnetti	**Douglas & Grahame**
	Oxbow	Eterna	Camel	
	Primark	C&A	**St Bernard**	Fabria
	BHS	Topman	Burton	St Michael

* Bold denotes Irish brand

Source: PwC retail interviews

Ladieswear

Upper end	Mariella Rosati	**Louise Kennedy**	FennWrightMason	Amanda Wakeley
	Montessa	Georgio Armani	Sara Sturgeon	**John Rocha**
	Gucci	Jasper Conran	**Marc O'Neill**	Marian Mona
	Donna Karen	Louis Feraud	**Quin & Donnelly**	Jocavi
	Ralph Lauren	**Lyn Mar**	**Michelle O'Doherty**	Lamberto Losani
	Prada	Versace		
Middle market	Max Mara	Gant	Sandwich	Ghost
	Tuzzi	Mango	Benetton	Steilman
	Gerry Weber	**Principles**	Duo	**Michel Ambers**
	Bianca	St Michael	**Yellowhammer**	French Connection
	Basler	Jobis	**Carraig Donn**	Lacoste
	Kaliko	**Brian Tucker**	**Callan Knitwear**	**M Mortell**
	Hirsch	Frank Usher	Pola	Alexon
	Loretta Bloom	**Porterhouse**	Oui-set	Sand
	Planet	**Libra**	In-wear	Joop
	Paul Costelloe	**Aria**	Part Two	**Traffic/Watercolours**
	Ramsey	Jackpot	Next	
	Michael H	Betty Barclay	**Regine**	Hennes & Mauritz
	Sisley	Tru	**Lisa Lovell**	
	Primark	First Impressions	Dorothy Perkins	First Avenue (AIS)
	St Bernard	**A-Wear**	Top Shop	Portland
	Ann Harvey	C&A	**Sasha**	

* Bold denotes Irish brands

Source: PwC retail interviews

'Irish designs are more readily acceptable at home than abroad.

Aer Rianta, Dorinda Kenny

Retail Trends

UK multiples have a much higher penetration in the NI clothing market than in the ROI with an estimated 65% penetration compared with 30% in ROI. A large percentage of independent clothing retailers are located outside the key cities of Dublin, Belfast, Cork, Galway, Londonderry and Limerick.

Over the last 3-5 years a high percentage of in-store concessions such as Oasis, Principles and Miss Selfridge have become visible in the Irish market. This growth is set to continue as department stores such as Debenhams, Clerys, Menarys and Arnotts clear unsuccessful ranges to create extra floor space for new concessions.

Independent retailers are forced to focus on the middle-upper end of the market as UK multiples have a high presence in affordable ranges. These middle to higher end independent retailers are the big accounts of Irish branded clothing manufacturers. A listing is given in the appendix.

Associated Independent Stores (AIS) are a UK based buying group which have 18 members in Ireland spanning the furniture, homeware and fashion businesses. AIS have negotiated favourable terms with a number of leading suppliers and run regular exhibitions for their members. They also have developed their own fashion label called First Avenue.

Buying groups such as AIS can negotiate significant discounts and play a key role in the clothing market, especially in the ladieswear sector, although their fashion offer tends to be conservative and slightly older.

Agents/distributors and showroom visits play a key role for clothing buyers in Ireland as trade shows have become less important (although the British and German shows are still well attended by Irish buyers).

The table below highlights a sample of the Ireland based clothing agents.

Ireland based agents

Brands	Northern Ireland	Republic of Ireland
Libra Designs	Seamus Mullan (00 44 28 9078 1195)	Donald Egan (00 353 1 872 6000)
Michel Ambers	McGurk Group (00 353 1 679 0002)	McGurk Group (00 353 1 679 0002)
Castle of Ireland	Des Lyttle (00 44 28 9024 6955)	Des Kennerney (00 353 1 466 0363)
Regine	Jane Baker (00 353 1 679 8122)	Jane Baker (00 353 1 679 8122)
Loretta Bloom	Mr D Gilchrist (00 44 28 9065 6511)	Bernadette Tiernan (00 353 61 311004)
Watercolours	Mr D Gilchrist (00 44 28 9065 6511)	Sharman Scott-McKenzie (00 353 1 838 62656)
Traffic	Mr D Gilchrist (00 44 28 9065 6511)	Donald Fadden (00 353 1 838 62656)
Michael H	Margaret Murphy (00 44 28 9077 7188)	Simon Dowling (00 353 1 872 5044)
Animale	McGurk Group (00 353 1 679 0002)	McGurk Group (00 353 1 679 0002)
Joseph Ribkoff	McGurk Group (00 353 1 679 0002)	McGurk Group (00 353 1 679 0002)
Sandwich	Heather Hall (00 353 1 671 5850)	Ronan O'Neill (00 353 1 671 5850)
MEXX	Ronan O'Neill (00 353 1 671 5850)	Ronan O'Neill (00 353 1 671 5850)
Stone Fashion	Ronan O'Neill (00 353 1 671 5850)	Ronan O'Neill (00 353 1 671 5850)
Freetex Fashions	Ronan O'Neill (00 353 1 671 5850)	Ronan O'Neill (00 353 1 671 5850)

Source: PwC research

Pricing and Margins

Pricing, margins and mark-up vary considerably between branded and own label ranges. Independent retailers tend to focus on branded ranges and typical prices are difficult to define without discussing specific ranges and market segments. However strong indications on performance can be gained from sales per square foot data.

In Dublin, key clothing retailers are achieving sales per square foot of IR£450-£700 per annum, compared with an average of IR£250–£450 elsewhere in the country.

Mark up on clothing in Northern Ireland averages between 2.3-2.6 times for better end ranges which includes 17.5% VAT. In ROI the average is slightly higher at between 2.5% and 2.8% which includes 21% VAT. Allowing for mark-downs of up to 10% of turnover, typical gross margins among Irish independent clothing retailers will be between 35-45%.

Rent inflation and key money for the zone A locations in Belfast and Dublin have driven out most of the independents and the leading Irish high streets now resemble other parts of the UK, with a dominance of UK multiples. Independent retailers have been relegated to suburban locations or zone B locations where they need to attract destination shoppers.

Irish manufacturers

There are an estimated 350 clothing manufacturing companies in Ireland (including NI), working in both branded, specialist and contract clothing. A list of Irish clothing manufacturers can be found in the following publications:

- ‘Clothing and Textiles–A Directory from Ireland’–Enterprise Ireland.
- ‘Manufacturing excellence in NI’ CD ROM–Industrial Development Board for NI.
- ‘Clothing and Textiles Excellence in Northern Ireland’–LEDU. www.ledu-ni.gov.uk.

It is estimated that Irish manufacturers control approximately 10-12% of the Irish clothing market. The main focus of their domestic business is aimed at the better end independent retailers. Exports account for around 50% of ROI manufacturers sales compared with 85% in NI. UK owned contract manufacturing sites such as Desmonds and Adria contributed to the picture in Northern Ireland.

In recent years a significantly higher proportion of Irish companies have become involved in outsourcing their production facilities to countries such as Turkey, Portugal, the Far East, Morocco, Czech Republic, Poland and Eastern Europe. With outsourcing in place, Irish clothing manufacturers can compete with GB, USA and other European brands. Marketing and Design functions remain in Ireland to control innovation and quality.

Scarce availability of staff and the cost of labour are key factors which will inhibit the growth and sustainability of the manufacturing sector in Ireland.

Irish manufacturers must combine fabric innovation and stronger design input for future ranges in order to compete with the German, Italian and French ranges. With few exceptions there has been a tendency for Irish clothing manufacturers to play safe and repeat successful previous ranges with minor updates.

‘We are anticipating that the tailored look on womenswear will be making a comeback for spring/summer 2001 season.

Irish multiple supplier

Opportunities for Clothing Suppliers in Ireland

In recent years the clothing market in Ireland has seen a wide variety of changes in fabrics, designs, styles and product trends. This has ultimately affected the consumer and his/her purchasing patterns.

Specific opportunities were identified during research undertaken by PwC in Spring 2000; these are outlined below.

Knitwear
Traditional chunky knitwear designs are being replaced by contemporary high fashion knits in luxurious wool blends of cashmere and silks. Italian influences have ‘hit’ the local market and fine gauge knits in both menswear and ladieswear are in big demand.

Irish manufacturers must invest in technological advances and design alliances to compete with other European knitwear brands if opportunities are to be exploited.

Traditional knitwear designs such as ‘Carraig Donn’ and ‘Blarney’ remain popular with the tourist market. This market offers growth potential for local companies.

Smart/casual co-ordinated ranges
Co-ordinated and well thought out ranges of smart/casual separates for both men and ladies are sought after by most retailers.

Collections should include a range of modern fabrics, such as linen, cotton and silk, and must be less structured in design and fit.

Local manufacturers will excel in ranges in which individual items can be mixed and matched with other clothing brands to create a classic yet casual ensemble.

Branded childrenswear/youthwear
A gap in the market exists for local companies to build on the popularity of branded European and American designs of childrenswear/youthwear and produce ranges of ‘fun’ clothing in fresh, bright fabrics.

Smaller families have helped increase expenditure per head on children and there is evidence of strong brand consciousness at this level of the market.

Few Irish brands are apparent in the middle-top end of the market, including Belart and Oz Clothing, while the St Bernard (Dunnes) label accounts for almost 20% of the affordable section of the market.

Ladieswear–special occasion collections
Successful local companies such as Regine, Loretta Bloom, Michael H and Traffic/Watercolours have made significant in-roads in producing a range of fashionable ladieswear clothing for the 25-50 year old segment of the ladieswear market.

The most sought after ranges include fashionable collections of co-ordinated suits, dresses and trousers for weddings, graduations, christenings and other special occasions.

The majority of these ranges are sold through quality independent retailers or department stores.

This offers local companies an excellent opportunity to increase sales both in domestic and GB markets.

Designer branded ladieswear/menswear range
In general, retailers were very supportive of the current ranges available from John Rocha, Paul Costelloe and Louise Kennedy, particularly in terms of the profile they provide for the stockist.

There remains an unfulfilled opportunity for a more commercial branded range of clothing from an Irish designer with an appeal to a wider audience than the current offer. Dublin or Belfast may never compete with Milan but credible international brands such as Mango (Spain), Matinique (Denmark)and Mexx(Holland) have come from less credible origins.

‘Fleece and functional warm clothing offers opportunities for Irish manufacturers, especially for the tourist market.

Leading Irish giftware retailer

Accessories

Retailers are now stocking collections of quality accessories such as hats, bags, wallets, belts, sunglasses and scarves/shawls to complement their men’s and ladies’ clothing ranges.

Irish manufacturers who can offer well designed quality products in contemporary fabrics/materials are in an excellent position. According to the retailers we spoke to at the time of this review, this sector is expected to grow both throughout Ireland and the rest of Europe and offers significant opportunities for new Irish suppliers.

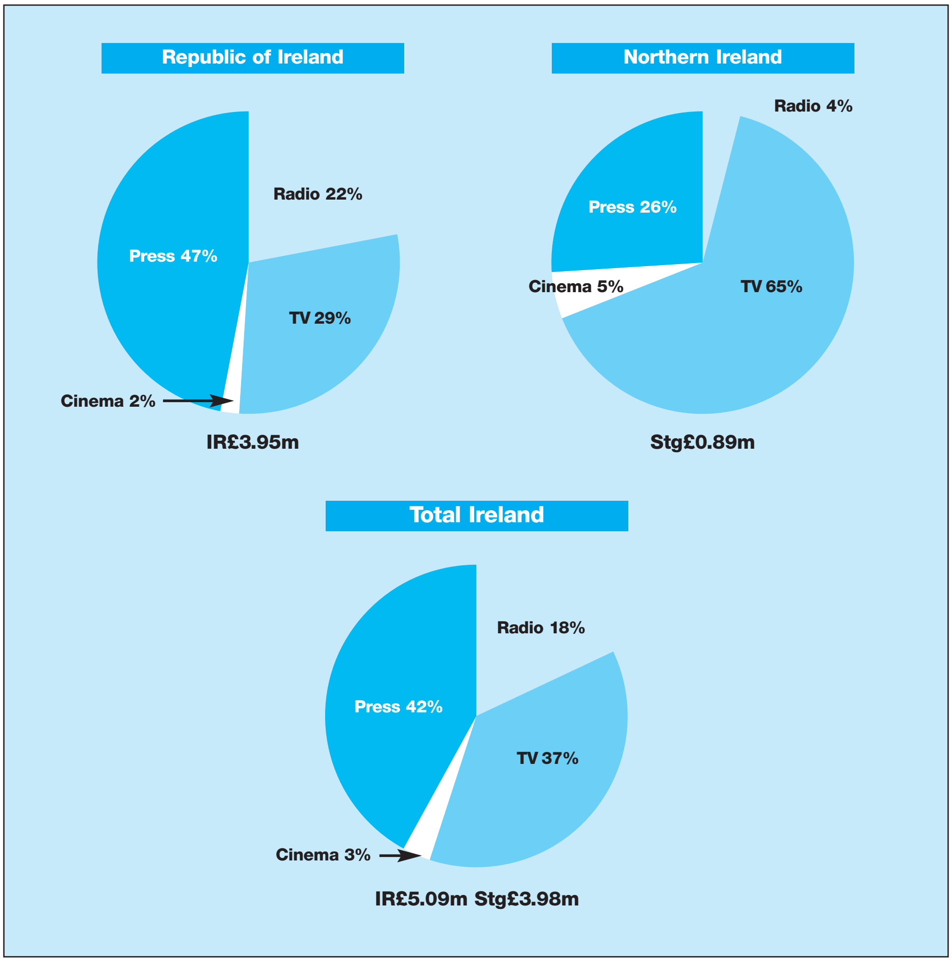
Functional Irish made clothing

Opportunities exist in the area of clothing such as wax jackets, fisherman’s smocks, hats, fleeces and shawls which have the built in credibility of ‘Made in Ireland’. Sales in this area are expected to remain steady as this is an important sector for the tourist market.

Advertising and Promotion

The clothing market attracts substantial media expenditure with £5.09m being spent throughout Ireland during 1999.

Advertising Expenditure on TV, Radio, Cinema and News-papers*



(% expenditure: 1999)

Media expenditure on clothing is substantially higher in the Republic of Ireland than in Northern Ireland.

Some major international brands are supported extensively in both the Republic and Northern Ireland. These include Adidas, Levi and Nike.

Heavily advertised brands like these have media budgets typically ranging between IR£150,000–400,000 per annum.

In addition, retailers are heavy advertisers in this market, in particular Brown Thomas, Roches Stores, Marks & Spencer and Debenhams in the Republic of Ireland and Gap in Northern Ireland.

Overall, press is the most extensively used advertising medium because of its popularity with retailers. However, television is the most heavily used medium for clothing brands due to advertisers' need to communicate not only style but also imagery.

Whilst outdoor advertising is not included in the above analysis this is popular as a support medium for clothing brands.

Other forms of promotion in the clothing market include in-store magazines, TV shows such as 'She's Gotta Have It' and the internet. The larger department stores and multiples have realised the value of the internet and have established their own web sites.

The impact of e-Commerce has had a major effect on the clothing market and is set to continue. The number of consumers purchasing via the internet is low at present, yet further technological advances and increased consumer confidence is expected to increase the number of clothing products purchased electronically. In the short term the collapse of Boo.Com has shaken investor and consumer confidence in internet media.

Approximately 2% of UK mail order catalogue sales are made via the internet. This is expected to increase with catalogues such as Kays, Freemans and Littlewoods offering selected clothing ranges on their web sites.

Brochures and promotional materials

- Irish based popular consumer magazines include; Northern Woman, Ulster Tatler, Irish Tatler, Image and Elegance. The leading UK publishing groups are also present in the market but tend not to be used by link brands/retailers for advertising.

Trade press

- UK trade press being used by the Irish market are: Drapers Record, FW and Menswear. Futura is the only Irish based trade publication.

Trade fairs

- London Fashion Week (February and August)
- Premier Fashion (February)
- MXL (February)
- Futura Fair (February)
- Pure Womenswear (February)
- SEHM Fashion Week (February)
- 40 Degrees (February and August)
- Premiere Vision fabric show (March)
- Women's and Menswear (January)
- The International Fashion Accessory Show (March)
- Showcase (January)
- Lingerie Paris (January)
- CPD (February and August)
- Womenswear (February)
- Premier Childrenswear (February)

Web sites

Irish manufacturers have been slow to respond to the e-Commerce opportunity. Few have developed their own web sites and none of the participants in this review were trading on line. However, many were beginning to post promotional sites.

- Retailer sites are on the increase and key apparel e-tailers such as Gap, Arcadia Group (Burton, Top Shop and Dorothy Perkins) and H&M have developed significant levels of on-line trading. Other web sites which have become important channels include Dressmart (menswear), Debenhams (clothing and general retail) and Littlewoods (general retail).

- Arnotts is an example of an Irish department store which has successfully launched its own web site. Information is provided to consumers on all clothing departments as well as in-store services and company developments. Further information can be viewed at www.arnotts.ie.

Outlook and Recommendations

Growth Trends

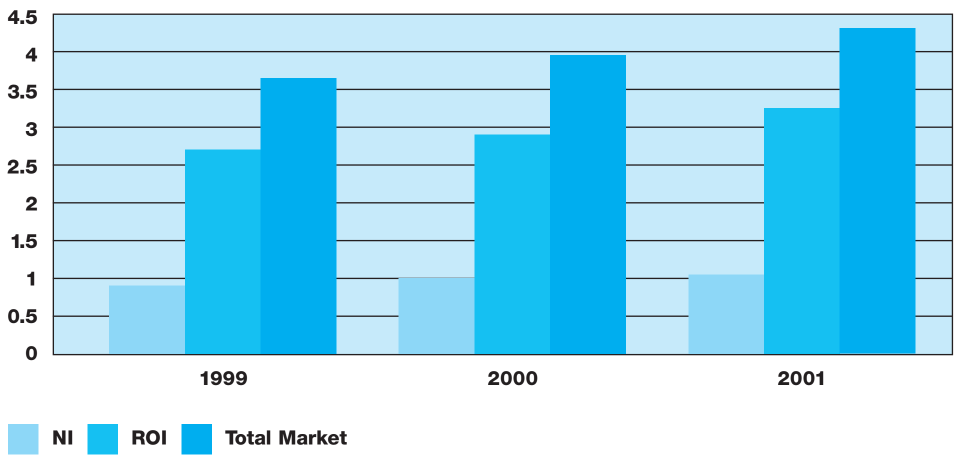
	1999		2000		2001		% change
	ST£bn	IR£bn	ST£bn	IR£bn	ST£bn	IR£bn	
NI	0.71	0.9	0.78	1.0	0.82	1.05	16%
ROI	2.0	2.5	2.2	2.8	2.3	3.0	20%
All Ireland	**2.7**	**3.4**	**2.9**	**3.8**	**3.1**	**4.0**	**19%**

Source: PwC research
ST£1 = IR£1.2775
Figures have been rounded up

The overall clothing market is forecast to grow by 19% by 2001. The best prospects by sector are ladieswear with annual growth of 12%, menswear 10%, lingerie at 8%, accessories and hoisery at 6% and childrenswear at 4%. Footwear sales are not expected to grow by more than 2-3% in line with inflation.

The ROI market is forecast to grow by approximately 20% against 16% in NI. This reflects the slower pace of the NI economy and continuing uncertainties about long term political stability.

Growth Forecast 1999-2001 (IR£)



Despite the uncertainty in the textile sector generally, there are opportunities for Irish clothing manufacturers in the domestic market in value added propositions.

Irish companies involved in the clothing market must review their own brand offer and re-align with the mindset of the next decade.

PwC's Global Retail Intelligence Group published their latest report on the apparel market in September 1999. They offer a strategic perspective on where apparel retailing and supply may be headed in the next decade. The table below highlights the changing views and opinions of clothing retailers, manufacturers and consumers.

Changing mindset of apparel retailing a global perspective

90's mindset	→	Next decade mindset
Consumers have a narrow store choice	→	Consumers shop everywhere
Consumers will stick with you if you do one thing really well	→	Consumers expect everyone to give them more in every area
The competition 'looks' like you	→	The competition is everywhere
You can operate in just one channel	→	You need to be everywhere in all channels
Your stores should look alike	→	Your store format should be flexible
Designers build the best lifestyle brands	→	Lifestyle brands can be built by anyone
Mall stores carry the best lifestyle brands	→	Lifestyle brands can be bought anywhere

Source: PwC Global Retail Intelligence Group, September 1999

In line with the above, local clothing suppliers must look at the complex environment we operate in and ensure that they are on their target customers' shortlist of brand choices.

Local manufacturers must deliver against the increasingly complex and diverse consumer expectations including price, design, quality, fashionability, fabrication and fit.

The list below outlines recommendations for the way forward and offers direction to Irish clothing suppliers.

New product development/relevancy
The success of new product development strategies is determined by how well the products look on the consumers and align with the general style trends at that time.

Best performing brands will deliver on consumers' expectations for fashion, functionality, fabrication and fit.

The Spanish brand 'Zara', which is taking the UK market by storm, is a good example of a clothing brand/retailer with speed to market authority and acute product relevancy. The apparel group use a team of over 50 designers to replicate new designer catwalk looks and finished products are delivered to stores within 20 days.

Lifestyle authority
Clothing manufacturers must be able to connect with their target consumers and reflect their lifestyle needs and aspirations through their designs.

Abercombie and Fitch, a leading US lifestyle brand, stays in touch with its customers by visiting college campuses and attending specialised events. They employ a network of college students as 'field editors' who call weekly updating the team on what is cool on campus this week.

Visits to key Italian cities and fashion shows would provide this type of information for local manufacturers interested in developing upmarket designer knitwear ranges.

> **‘Customers are not mad about entire outfits in full bright colours, but are buying a single colourful piece of clothing or a softer set – colour will be the next big story.**
>
> **Luke Hasson, Austins, Derry**

Fabric procurement/material sourcing
Limited volumes and knowledge of overseas suppliers has created difficulties for some Irish clothing manufacturers when sourcing material fabric for their collections. This can compromise good product development ideas and constrain creativity. Market intelligence on fabric trends and potential sources can be obtained via the Government Agencies, or through Premier Vision, the principal fabric fair in Paris each Spring.

In order to respond to the flexible buying patterns and shorter response times demanded by fashion buyers, local manufacturers must develop relationships with fabric houses and distributors to ensure that innovative modern fabrics can be obtained within deadlines and that top-up supplies can be obtained in season.

Offshore manufacturing
Offshore manufacturing facilities help local manufacturers compete in the marketplace by increasing their flexibility at a lower cost.

This may not be applicable for all clothing suppliers but many ladieswear brands have benefited from either re-locating or outsourcing manufacturing facilities to foreign locations such as Turkey, Poland and the Far East.

Retention of local control over value added functions such as design, sampling and marketing are essential. A case study of the Danish model for apparel industry development can be referenced from Enterprise Ireland and LEDU.

Flexibility in buying patterns/response times
Fashion buyers are now purchasing apparel both in and out of season and expect suppliers to be able to meet this demand pattern.

Flexibility with ordering and re-ordering ranges and quicker local response times are essential ingredients to survival in the retail clothing market.

Local manufacturers must remain flexible and change with the times if orders are to be sustained, especially in the ladieswear ranges where the seasons are becoming shorter. For example Mexx structure their collection around 9 delivery drops beginning with Holiday, Spring 1, 2 and 3, Summer, Cruise, Fall 1 and 2 and Winter.

Retailer relationships
Manufacturers can improve relationships with their key retailers by having more of a direct involvement with the leading buyers, even where agents are in place. E-Commerce also offers an opportunity for Irish manufacturers to bridge the gap between themselves and their retail customers through on line invoicing, order confirmation, delivery notification and stock management.

This may involve joint marketing and promotional initiatives such as involving key buyers on fabric sourcing trips or alliances with local designers.

Local manufacturers will benefit from a closer working relationship with their key retailers. In turn the retailer will obtain inside information on upcoming designs/trends and through alliances with designers, may be able to attract a more sophisticated consumer and command higher price points.

Market intelligence/research
Irish manufacturers must get closer to their customer (retailer and consumer) by carrying out ongoing market research in order to attract target customers, retail buyers and ultimately increase market share.

Successful clothing companies will use a range of the following to gather information on their market;

- trade show visits (fashion and fabric)
- visits to style capitals such as Paris, Milan or New York for retail intelligence
- leading edge fashion press
- preview catwalk shows
- market intelligence from specialist consultants such as Kurt Salmon Associates, PwC Retail Intelligence Group and TNS (Taylor Nelson Sofres)
- Irish Trade associations such as ICATA, IKEG and NITA (details in appendix)
- field work amongst target consumer groups
- fashion intelligence from EI/LEDU
- art schools / universities
- other clothing retailer web sites eg; Gap, Selfridges, Bloomingdales, to view trends and identify leading brands

Where agents or sales representatives are regularly visiting customers on behalf of the supplier, valuable competitor and brand performance data can be collected effectively and reported back to head office.

e-Business/e-Commerce option
The electronic age is beginning to affect apparel suppliers and retailers at two levels; first fashion and fabric trends are being diffused rapidly on a global basis; second some more progressive firms are beginning to take advantage of on-line trading.

The internet provides both consumers and retailers with an additional means of communication with key suppliers and will offer locally based companies an excellent global marketing tool. Clothing suppliers to the UK multiples are already having to come to terms with the e-business model in their order processing, invoicing and delivery transactions.

Technology can also be used effectively to reduce the distance between the manufacturer, retailer and consumer and could improve customer service and response times.

Product diversification
Irish clothing manufacturers will not survive if they allow themselves to be constrained by the limits of their product facilities or in-house skills. Flexibility of production resources is paramount to the success of a market led fashion business. Therefore Irish suppliers need to have established reliable outsourcing resources when particular looks come 'on trend' which they cannot produce in-house.

Key Clothing Retailers

Retailer	Locations	Outlets	Buyer/owner	Telephone No.
Department stores				
Adairs	Londonderry, NI	1	Buying Director – Anne Adair	00 44 28 7126 3273
Arnotts	Dublin, ROI	1	Eddie Shanahan – Marketing Director	00 353 1 805 0400
Austins	Londonderry, NI	1	Owner – Luke Hasson	00 44 28 7126 1817
Brown Thomas	Dublin, ROI	4	Buying Director – Ann Marie Flood	00 353 1 605 6666
Clerys	Dublin, ROI	1	Menswear – Pat Carthy/Pat Quigly	00 353 1 878 6000
Dixons	Coleraine, NI	1	Mrs Joan Dixon	00 44 28 7034 2076
Dunnes	NI	27	Head of Buying – David McDermott	00 44 28 3026 7111
	ROI	80		00 353 1 475 1111
Houstons	Banbridge, NI	6	Director – John Houston	00 44 28 4066 2447
McElhinney's	Athboy, ROI	1	Mary Sweeney	00 353 46 32112
McKillens	Ballymena, NI	1	Menswear – David Berryman	
			Ladieswear – Janice Smyth	00 44 28 2565 2151
Menarys	Dungannon, NI	16	Buying Director – Stephen McCammon	00 44 28 8772 2128
Moores	Coleraine, NI	1	Samuel Moore	00 44 28 7034 4444
Roche Stores	ROI	12	Menswear – Coilin Fisher	00 353 1 873 0044
	NI	1	Ladieswear – Carol Redelin	
			Childrenswear – Carol O' Sullivan	
Ladieswear				
Amee's	Limerick, ROI	1	Mary McMakon	00 353 6 141 5843
Brazil	Belfast, NI	2	David Simpson	00 44 28 9024 5552
Capri	Newry, NI	2	Anne Moore	00 44 28 3026 6899
Carter	Belfast, NI	1	Janice Watson	00 44 28 9024 3412
Chic-Shop	Wexford, ROI	1	Mrs Par Dizor	00 353 53 22799
Clothes Ireland	Enniskillen, NI	1	Lorraine Dunn	00 44 28 6632 9953
Confianza	Dublin, ROI	2	Bernie Kelly	00 353 1 278 1050
Fashion Shack	Newry, NI	1	Bernie Traynor	00 44 28 3026 8086
Four Seasons	Magherafelt, NI	1	Marianne Quigg	00 44 28 7963 1867
Front Room	Cookstown, NI	1	Michelle Forbes	00 44 28 8676 4148
Garments of Galway	Galway, ROI	3	Oliver Concannon	00 353 9 156 1855
Gladrags	Limerick, ROI	2	Mary Gelvin	00 353 6 141 1355
Harlequinn	Belfast, NI	1	Avril Lavery/Mandy Thompson	00 44 28 9045 5177
Helen Modes	Limerick, ROI	2	Mrs Lynam	00 353 6 141 2711
Hob Nob	Banbridge, NI	1	Carolyn Adams	00 44 28 4062 4385
Ken Young	Coleraine, NI	1	Dorothy Young	00 44 28 7035 1300
Khan	Dublin, ROI	1	Trina McCarthy	00 353 1 278 1646
Lizannes	Bangor, NI	1	Miss E. McMullan	00 44 28 9146 9129
Logan's	Cloughmills, NI	1	Mrs Boyd	00 44 28 2763 8685
MacBees	Killarney, ROI	1	Mary McBride	00 353 6 433622
Monica Peter's	Dublin, ROI	3	Monica Cullen	00 353 1 288 8902
Nantucket	Holywood, NI	1	Linda Hayes	00 44 28 9042 5527
Olivia Daniel	Athlone, ROI	1	Olivia Cochrane	00 353 9 027 2707
Pamela Scott	Dublin, ROI	13	Maura Leavy	00 353 1 679 6655
Paparazzi	Lisburn, NI	2	Ruth Gamble	00 44 28 9266 6808
Pauline's	Cavan, ROI	1	Pauline Brady	00 353 49 433 7247
Pebbles	Portadown, NI	1	Gillian Graham	00 44 28 3835 0914
Penny Lane	Irvingstown, NI	1	Avril Armstrong	00 44 28 6862 1431
Petal	Belfast, NI	3	Fiona Lynas	00 44 28 9032 9836
Pinnacle	Dungannon, NI	1	Pauline Cullen	00 44 28 8772 4091
Ryalto	Belfast, NI	1	Lorraine Jebb	00 44 28 90 66 7765
Serena	Dublin, ROI	4	Bernie Kelly	00 353 1 668 6617
She	Omagh, NI	1	Noreen mcCann	00 44 28 8224 1088
Sheenan's	Cork, ROI	2	Sheena Welsh	00 353 2 127 0574
Susan Charles	Cork, ROI	4	Charles McGarry	00 353 2 127 3771
The Gallery Boutique	Newry, NI	1	Maureen Toner	00 44 28 3026 6922
The Red Parrot	Belfast, NI	1	Mrs Iggeulden	00 44 28 9073 8538
The White Bicycle	Belfast, NI	1	Karin Brady	00 44 28 9045 7719
Treasure Chest	Galway, ROI	1	Mrs Bennett	00 353 9 156 3862
Ursula	Armagh. NI	1	Ursula Flowey	00 44 28 3752 4596
Utopia	Ashbourne, ROI	1	Eileen McNally	00 353 1 835 2151
Veronica's	Londonderry, NI	1	Mary Black	00 44 28 7126 2883

Key Clothing Retailers

Retailer	Locations	Outlets	Buyer/owner	Telephone No.
Menswear				
Carter	Belfast, NI	1	Basil Millar	00 44 28 9024 3412
Cuba Classics	Dungannon, NI	1	Steven Mullan	00 44 28 8722 7575
Excel Clothing	Newtownards, NI	2	Glen Johnston	00 44 28 9182 0990
F X Kelly	Dublin, ROI	1	Richard Farrell	00 353 1 677 8211
Hanley's Menswear	Galway, ROI	1	Joe Hanley	00 353 9 156 7951
Jiani	Moira, NI	1	Phillip Mitchell	00 44 28 9261 9161
Louis Copeland	Dublin, ROI	3	Louis Copeland	00 353 1 661 0110
Parsons & Parsons	Belfast, NI	1	Robert Morton	00 44 28 9032 5088
Rio	Belfast, NI	2	David Simpson	00 44 28 9032 5504
Ryan's	Galway, ROI	1	Anthony Ryan	00 353 9 156 1818
S & J Moore	Coleraine, NI	1	Samuel Moore	00 44 28 7035 3300
Saville Menswear	Cork, ROI	3	Tony Lynas	00 353 2 127 0334
The Source	Coleraine, NI	1	Diane smith	00 44 28 7032 0660
Childrenswear				
Lemon Tree	Banbridge, NI	1	Simon/Leona Shaw	00 44 28 4062 7335
Rascals	Strabane, NI	1	Lesley Patterson	00 44 28 7188 4174
Scallywags	Ballymena, NI	1	Janice McConnell	00 44 28 2564 5504
The House of Brindle	Lurgan, NI	1	David Calvert	00 44 28 3832 1721
The Little Nut Tree	Newtownards, NI	1	Mrs Annie Annette	00 44 28 9181 2193
Kidstuff	Navan, ROI	2	Louise Lynch	00 353 46 72414
Kidzone	Dublin, ROI	3	Lee Flynn	00 353 1 493 9081

Market sources

Enterprise Ireland:	A Directory of Irish Clothing Manufacturers
LEDU:	Market Research on UK fashion market 1997 Textiles sector profile 1997
IDB:	Manufacturing Excellence in NI, 1999
ABT/IDB/IFI:	Market Opportunities Ireland (1995)
Profound:	UK Womenswear Market (1999)
Key Note:	Clothing Retailing (1998) Clothing Manufacturing (1998)
Mintel:	Menswear buyer
Trade Press:	Menswear Fashion Forecast FW (formerly Fashion Weekly) Drapers Record Bodystyle Children's Clothing International
Corporate Intelligence on Retailing:	The European Clothing Retailing Handbook 1999
DTI:	A guide to Exporting to the North American Clothing and Textiles Market–1995 Directory of UK Clothing and Fashion Centres 1998
Central Statistics Office Reports:	Import/Export Statistics Family Expenditure Survey Household Expenditure Survey
PricewaterhouseCoopers:	European Economic Outlook January 2000 Retail Development Survey February 1997
Associated Independent Stores:	Telephone: 0044 121 7112200

Useful web sites

Enterprise Ireland:	www.enterprise-ireland.com
Industrial Development Board for Northern Ireland:	www.idbni.co.uk
LEDU:	www.ledu-ni.gov.uk
Central Statistics Office:	www.cso.ie
PricewaterhouseCoopers:	www.pwcglobal.com
British Apparel and Textile Confederation:	www.batc.co.uk
National Union of Knitwear, Footwear and Apparel Traders:	www.poptel.org.uk/kfat
ICATA, Irish Clothing and Textile Alliance:	Web site under development
IKEG, Irish Knitwear Exporters Guild:	www.ikeg.ie
IBEC, Irish Business and Employers Confederation:	www.ibec.ie
NITA, Northern Ireland Textiles and Apparel Association:	Web site under development
Irish Linen Guild:	www.irishlinen.co.uk
Yellow Pages (NI):	www.eyp.co.uk
Golden Pages (ROI):	www.goldenpages.ie
Northern Ireland Stastics and Research Agency:	www.nisra.gov.uk
Corporate Intelligence on Retailing:	www.cior.com
Kompass:	www.kompass.ie

Notes

Notes

InterTradeIreland – Trade & Business Development Body is committed to enhancing the economies of the island of Ireland through facilitating cross-border and all-island programmes in partnership with key agencies and the business sector at all levels.

Enterprise Ireland (EI) is the Government organisation with responsibility for supporting the growth of the competitiveness, sales, exports and employment of local industry in the Republic of Ireland.

The Industrial Development Board for Northern Ireland (IDB) is responsible for stimulating growth within companies in Northern Ireland and attracting overseas investment.

LEDU, the Small Business Agency for Northern Ireland, supports local economic development and promotes the establishment and expansion of small local enterprises, primarily in the manufacturing and tradeable services sectors, whose employment is generally less than 50.

InterTradeIreland, Enterprise Ireland, the Industrial Development Board for Northern Ireland and LEDU would like to thank all those buyers, distributors and industry experts who contributed their time and expertise during the course of this study. It was most appreciated.

Report Series
This market profile is accompanied by a number of similar reports giving an all Ireland retail perspective on a range of consumer product areas.

The sectors covered are
1 Domestic Furniture
2 Contract Office Furniture
3 Hotel Furniture
4 Contract Fitted Furniture
5 Housewares and Soft Furnishings
6 Giftware and Jewellery
7 Clothing and Footwear
8 Small Kitchen Appliances (2001 Release)

An additional document giving an all Ireland analysis of retail trends entitled " Ireland, A £20 billion+ Retail Market" is also part of the series.

Note
This report was researched for InterTradeIreland, Enterprise Ireland, the Industrial Development Board for Northern Ireland and LEDU by PricewaterhouseCoopers, Belfast. While every effort has been made to ensure the accuracy of information provided in this report, neither PricewaterhouseCoopers nor InterTradeIreland, EI/IDB/LEDU can accept responsibility for possible errors or omissions.

Photography: Courtesy of the Crafts Council of Ireland and Showcase Ireland Events Ltd.

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