

Clothing and Textile Industry AN OVERVIEW

Whether it is clothing and accessories for the wardrobe, textiles for the home or for garment manufacturers, or clothing for the workplace or leisure activities; whether the design is classic, contemporary or cutting edge, British suppliers can provide the answer.

An important, evolving industrial sector: The clothing, textile and footwear industry is the eighth largest manufacturing sector in Britain, generating sales in excess of £15 billion and exports of £6.5 billion from over 15,000 companies employing 350,000 people. The shape of the industry has changed dramatically every decade. It continues to respond to new trading opportunities and to ever demanding consumers. Its inherent strengths in innovation, design, quality, supply chain management and technology ensure that the industry is well placed for the challenges of the 21st century.

The industry is represented via the British Apparel & Textile Confederation (BATC) which debates the issues affecting trade at both national and international level. The BATC also has a number of leading trade associations and organisations representing specific sectors within its membership.

A wealth of products: British companies are renowned for supplying top quality apparel, home furnishings, and cutting-edge designer fashion which is sold around the world. This success is founded on a close partnership with the equally internationally successful textile industry which designs, manufactures and supplies top quality woolsens and worsted fabrics for suiting and furnishing as well as linens, Harris Tweeds, fine cottons, silks, cashmere and tartans. Traditional and contemporary apparel brands are found in stores and boutiques worldwide and British fabrics and yarns are much sought after by international branded fashion houses.

Britain has an excellent international reputation for its innovative design expertise, so much so that several of the best British designers are working for leading international fashion houses. Bespoke orders for clothing, such as suits made by the famous tailors in the Savile Row area of London, and, increasingly, footwear, are another important element of the industry.

A unique retail environment: The unique structure of the British retail scene, where the large stores and chains account for 75 per cent of the market, has led to a further innovation in clothing and textile companies. Britain has developed one of the world's most sophisticated supply chain management systems, focused upon providing high quality, designed, innovative garments and furnishings via stores, catalogues and, more recently, internet sites serving the consumer.

Manufacturing diversification for growth: In the past 20 years, manufacturers of traditional apparel fabrics have diversified and a growing number have developed businesses supplying technical textiles for industrial applications. Traditional weavers now produce cloth not just for clothes, but also for hotel furnishings. Machinery used in the past for cotton weaving is being used for new products such as seamless airbags for cars. A lace specialist is producing synthetic aortas for the medical sector and many companies are diversifying into geotextiles for construction projects.

Efficiencies from IT: Information technology plays a large part in ensuring the efficiency of supply. Many retailers and suppliers use the data provided by sophisticated computer programmes to follow which lines are selling, to locate merchandise in the supply chain and to identify the components needed for production. More administrative work is being conducted on-line to speed up procedures and CAD/CAM systems are also widely used in the industry.

Educational excellence: The variety of products available from Britain is due in some part to the wide range of courses on offer from the country's 30 major colleges. Students can choose to learn about technical subjects such as colour chemistry and pattern cutting, business skills such as management, marketing and merchandising or a wide variety of fashion and textile design courses. Though many specialist courses in specific product areas, for example footwear, lingerie and lace, are available, many colleges are starting to offer courses combining modules to ensure graduates leave with a broad base of skills.

Education and industry partnership: There is a very close partnership between education and industry. Companies sponsor exhibitions, fashion shows and competitions, bursaries and work placements, realising the end value to the industry. Over 60 per cent of design students find employment in British companies. To assist fledgling designers find employment, the British Fashion Council's 'Colleges Forum' runs an annual Open Day attended by manufacturers, retailers, designers, public relations and marketing companies who preview the work of students due to graduate that year. An award for creative pattern cutting is also organised by the Council to promote the need for this skill in the industry.

Early learning: Education activities do not focus solely on help for graduates. Education Resource Packs have been produced for schoolchildren and their teachers. These aim to develop a wider appreciation of the needs and jobs within the clothing and textile industry and combine background information on the industry with project work complementing the National Curriculum. The Packs were compiled with support from BATC, the Department of Trade and Industry and the Department for Education and Employment. Marks & Spencer plc and the clothing industry's training organisation, CAPITB.

Lifelong learning: CAPITB and the training organisation for the textile industry ensure this good start is carried on throughout an individual's career. These two organisations develop National Vocational Qualifications for employees and specialist skills training to enhance and update the training already provided by universities and schools.

A global exporting success story: British exports continue to grow, with export sales topping £6 billion in 1997. The majority of these sales are in the

EU, the USA and Japan but companies are constantly exploring new opportunities and exporting further afield. Brazil, China and India are newly emerging markets causing companies to focus in new areas. There are four main trade associations helping to promote British companies in new and developing markets: the British Knitting & Clothing Export Council, the British Menswear Guild and the British Footwear Association support British apparel and accessory companies at trade fairs and on trade missions worldwide, and the National Wool Textile Export Corporation provides similar support for yarn, fabric and furnishing companies.

Beyond 2000: Looking to the future, new media such as the Internet and interactive TV offer new export and domestic opportunities for British companies. While electronic shopping may still be a new industry in Europe, British companies are among the pioneers, successfully experimenting with its many connotations and possibilities.



Britain's Telecom Industry

BRITAIN has the most open telecommunications market in the world. Since the early 1980s, British Government initiatives to liberalise this market have ensured the establishment of a highly sophisticated and rapidly moving industry. As a result of liberalisation, massive investment from major British and international companies has positioned this industry as a world leader in terms of diversity and speed of uptake of domestic and business services; expertise in transmission and infrastructure development; and strength in equipment manufacture, opto-electronics and software development. All of this is underpinned by research and development.

Through liberalisation, which started with the privatisation of Post Office Telecommunications in 1981 to create British Telecommunications (BT), the telecommunications industry has developed a highly sophisticated structure. There are now various telecommunications network operators and a larger number of service providers competing in the provision of satellite, cable mobile and terrestrial communications.

At the heart of the industry, digital technology is rapidly being adopted for the reproduction, storage and transmission of information in all media. This means that any form of content (still or moving pictures, sound, text and data) can be made available via any transmission medium. As a result, the telecommunications industry in Britain is on an exciting path of convergence with broadcasting, IT and content industries.

Britain is well placed to take advantage of this convergence and is quick to explore the opportunities of the Information Age. Britain has world-class content industries in broadcasting, publishing, information and advertising; innovative software creators; world-class centres of innovation;

many based on inward investment; and a uniquely favourable regulatory system based on both the early liberalisation of telecommunications and the gradual development of competition in broadcasting. The converging technologies have increased the competitiveness of various important sectors of the economy. For example, information processing is crucial to financial services, retailing and travel. Electronic data interchange (EDI) and other forms of electronic trading is transforming commercial activity, bringing fewer errors, faster turnaround and lower costs. The World Wide Web, with its interactive and multimedia features, provides exciting ways of promoting and selling products.

Because of these developments, the communications industry in Britain has become characterised by a flexible matrix of service provision. This involves companies integrating and building their share in residential and business markets, while increasing their exports of services and products all over the world. Competition in this market is based on the provision of fixed and mobile telephone communications, television (including digital television) and radio broadcasting, an ever-growing range of value-added services. In the space of little more than five years, there has been a quantum leap in the range of services available to both domestic and business consumers. More than 30 per cent of homes in Britain have a PC; many also have modems, CDs, printers and bundles of advanced software. Almost 40 per cent of businesses in Britain have their own website. The Internet and intranet are used increasingly frequently. An important part of the Government's role, alongside protecting consumers and ensuring a highly competitive marketplace, is to make the benefits of the Information Age available to everyone.

Energy and Natural Resources

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Inland Energy Consumption in 1996 (in terms of primary sources)		
	Million tonnes of oil equivalent	Per cent
Natural gas	82.4	35.6
Oil	78.6	33.9
Coal	46.7	20.2
Nuclear energy	21.1	9.5
Hydro-electric and wind power	0.3	0.1
Net imports of electricity	14	0.6
Total	231.6	100.0

Excludes pumped storage.
Note: Differences between totals and the sums of their component parts are due to rounding.

environment. Money is also available from the European Union to stimulate energy efficiency in industry and in the home through funding of studies during 1996-2000.

Oil and Gas: The first notable offshore discovery of oil in the United Kingdom Continental Shelf (UKCS) was made in 1969. In 1996, output of crude oil and natural gas liquids averaged 2.78 million barrels a day, making Britain the world's ninth largest producer. There were 173 offshore oil and gas fields in production at the end of March 1997, and 18 new development projects were approved during 1996. Britain's largest offshore oilfield is at Wytch Farm in Dorset. The two largest British oil companies are British Petroleum and Shell Transport and Trading.

By 1977, natural gas, first exploited in 1967, had replaced town gas in the public supply system in England, Scotland and Wales. It now accounts for about a third of total British inland primary fuel consumption. In 1996, indigenous production amounted to 89,840 million cubic metres.

Cumulative gas production to date is 1.14 million million cubic metres. The remaining total reserves are estimated to be between 1.29 million million and 3.8 million million cubic metres.

Coal: The coal industry has contracted considerably in recent decades, with the closure of many collieries. Nevertheless, in 1996, inland consumption of coal was still 71.4 million tonnes, of which over three-quarters was used by the electricity generators. While total production from British deep mines is falling, output from opencast mines has remained relatively stable. Opencast accounts for most of the low-sulphur coal mined in Scotland and south Wales.

Electricity: There are 33 generating companies in England and Wales, which sell electricity to suppliers through a marketing mechanism known as the 'Pool'. The National Grid owns and operates the transmission system, and is responsible for calling up generation plant to meet demand. Distribution (transfer of electricity from the national grid to consumers through local networks) is carried out by 12 regional electricity companies.

In Scotland, Scottish Power plc and Scottish Hydro-Electric plc generate, transmit, distribute and supply electricity within their respective franchise areas. They are also contracted to buy all the output from Scottish Nuclear Ltd until 2005. In Northern Ireland, three companies generate electricity from four power stations. They are obliged to sell to Northern Ireland Electricity, which has a monopoly of transmission and distribution, and a right to supply.

In 1996, sales of electricity through the distribution system in Britain amounted to 298.9 terawatt hours.

Nuclear stations now account for 28 per cent of electricity generation, and combined cycle gas turbines, which use natural gas, for 20 per cent.

These increases have been balanced by a fall in coal and oil-fired generation, which in turn has reduced emissions of the greenhouse gas, carbon dioxide.

Renewable Sources of Energy: New and renewable sources of energy, which include large- and small-scale hydro, wind power, solar power and biofuels (landfill gas and energy from wastes and energy crops), accounted for 2 per cent of all electricity generating capacity in 1996. Natural flow hydro schemes provided about three-quarters of this total. However, this translated into only 1.25 per cent of electricity available in Britain that year.

The Government is reviewing renewable to assess the feasibility of producing 10 per cent of Britain's electricity demand from such sources by 2010.

Water Supply: About three-quarters of Britain's water supplies are obtained from mountain lakes, reservoirs and river intakes, and about a quarter from water stored underground. The quality of drinking water is high. However, summer 1995 to spring 1997 was the driest two-year period in England and Wales for over 200 years; water can no longer be taken for granted. Leakage in supply pipes is another problem. By contrast, Scotland and Northern Ireland still have plentiful supplies of water for domestic use and for industry.

To prevent future shortages, the Government announced a ten-point plan in May 1997, which the privatised water companies have agreed to follow. The points include mandatory targets and reduction in leakage over the next five years, and a review of the water charging system and metering policy.

Education

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nology.
Over 95 per cent of students on first degree and other comparable higher education courses receive government awards covering tuition fees and a maintenance grant. Parents also contribute, the amount depending on their income. In addition, students can take out loans to help pay their maintenance costs. The system of student finance is to be reformed from October 1998 in order to share the costs of higher education with those who benefit from it.

Large numbers of people come to Britain from other countries to study. Over 500,000 overseas students attend publicly funded higher and further education institutions in Britain, an increase of around three-quarters in the last ten years.

Off Highway and Specialist Vehicles Industry

WHILE the vast majority of the world's vehicles are designed to travel on a road network, a large and demanding market also exists for specialised vehicles which are able not only to travel, but also to work off-road. Apart from its great strength in the manufacture of road-going passenger cars, vans and trucks, Britain also has an extremely strong sector manufacturing such off road vehicles for a wide range of purposes.

Although the needs of this market are so diverse, it can be divided into three general areas. The first is that of vehicles for agricultural purposes, for cultivation and harvesting of different crops in varied terrain. Included in this category are vehicles for general land maintenance, for environmental work and for the handling of emergencies in areas which are difficult to access.

The second class of vehicle covers use in the civil engineering and construction industry, for mineral extraction and other similar purposes.

The third category includes specialised vehicles which undertake the safe and efficient handling of materials, particularly at points where they are transferred between transport and storage. This class also includes vehicles made for diverse special purposes such as the movement of aircraft, goods and passengers at airports.

In many areas of this specialised business, Britain has one of the longest traditions of manufacture. Because Britain led the industrial revolution, British manufacturers were among the first to develop vehicles to meet the problems and challenges created by large-scale industrial development. That tradition of innovation has been maintained, and today British-based manufacturers can offer a huge range of modern, efficient vehicles for all industrial, agricultural and allied purposes. Some of today's successful manufacturers can trace their British origins back 50 years or more; others are the result of inward investment by major overseas companies such as AGCO, Case, Caterpillar.

Komatsu and Terex seeking to take advantage of Britain's advantages as a manufacturing base.

All these manufacturers have the advantage of being able to call on first-class research and development facilities, and on the services of a large and capable component and systems engineering sector. The sector is further assisted by the efforts of three specialised trade associations, for agricultural machinery, for construction equipment, and for airport services and equipment.

This specialised vehicle industry is large enough not only to meet Britain's own needs but also to export in large volume to many overseas markets. In 1997, exports represented 70% of the £1.25 billion turnover of British-based companies in the construction equipment and crane sector alone. The agricultural machinery sector exported vehicles and equipment to the value of £1.6 billion, resulting in a net trade balance for the sector of almost £800 million.

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