

director@™

The international magazine for the corporate clothing, workwear and PPE supply chain

The RISE of Workwear

How innovation in the UK workwear market is gathering momentum

Features on:

- BTC Activewear's plans for 2009
- Designing the perfect exhibition space
- Corporate and workwear fabrics

PLUS MUCH MORE!

Check out our Brands

www.director-e.com

www.fabricdirector-e.com

www.workwearshow.co.uk



The Rise of Workwear

Increased competition in the European workwear market is driving design innovation and service in the UK as never before

Whether you go to exhibitions, conferences, board meetings or even the water cooler, the word on the lips of the working garment industry is still 'workwear'. The growth of the global workwear market has been well-documented over the past five years or so and yet it shows no sign of removing itself from the limelight. And why should it? With growth expected to continue over the coming years, it's only natural that more and more businesses should jump aboard for a slice of the action. But as competition increases and customers' expectations are raised, the real question is what are businesses doing to distinguish themselves in this market? director-e spoke to a selection of workwear manufacturers and suppliers to find out how they are carving a path for the road ahead.

Image and service

The global workwear market is worth an estimated US \$4.4 billion and is expected to grow by 8.1% between 2005 and 2012, according to Just Style's Global Review of Workwear Forecasts 2012 (2006 edition). Asia is predicted to represent 60% of the world growth, with Latin America accounting for 45%. Meanwhile, the report suggests that North America will witness only small growth and the highly competitive and dynamic European workwear market will remain static or even decline. The workwear market in Europe reportedly has over 700 work clothing producers or brands. However, changing industrial and consumer requirements are still expected to drive growth within specific segments of it.

Tim Anson, Ph.D. from **INVISTA**, one of the world's largest integrated fibres and polymers businesses, says that design innovation and service will be at the forefront of this: "Apart from the significant shifts in sourcing behaviour within the industry, there are shifts toward more stylish and functional garments for work clothing. Companies are also looking at how they can offer increased service packages."

One of the driving forces behind the demand for more functional garments is the mounting focus on health and safety. For example, legislation such as the Corporate Manslaughter and Corporate Homicide Act 2007, which came into force in April 2008, will make employers think twice about whether their workforce is adequately protected. Tim adds: "There's increasing pressure to meet multiple EN norms with a single fabric solution and

therefore garment, so this will drive further technical development of fabrics and garments."

The usage of **INVISTA'S CORDURA®** fabrics within the workwear market reflects this shift towards high performance wear. Sales of the durable fabrics, which offer harder-wearing properties, have accelerated in the past five years along with the geographical expansion of image wear within Europe. "Both employers and employees have become more concerned with corporate and personal image, which has driven the growth of image wear," says Tim. "And the demand for function and fashion has encouraged garment makers to introduce innovative design concepts in garments and use fabrics and technologies with performance benefits and aesthetic qualities."

Combining work and leisure

With the market in mainland Europe becoming overcrowded, there's more scope for opportunities within the UK. Generally thought to be about ten to 15 years behind Europe in terms of workwear designs, the UK market offers companies that have already captured a sizeable share of the market on the continent a new platform for their products. Scandinavian manufacturers with more leisure-like styles of workwear, for example, are already turning peoples' heads. Entering the UK market in 2000, Denmark-based **Mascot International** has created a niche for itself in high end workwear to witness 20% growth in sales between 2006 and 2007.

UK sales manager **Mike Tottman** says: "Our designs show a real convergence with leisurewear, and that's where the UK market is going where workwear is concerned. In Europe and now increasingly in the UK, people want to go down the pub after work in the same kit that they have been at work in and not feel ashamed of it."

In Europe and now increasingly in the UK, people want to go down the pub after work in the same kit that they have been at work in and not feel ashamed of it



He admits that there is still a way to go, however. "In general, the navy blue poly/cotton boiler suit is really still the vogue for most of the UK, as a lot of manufacturers there aim their designs at industry.

"Scandinavian designers, however, look outside this and say, 'What about the guy in the street?'

They try to mirror the casual look of someone who wears jeans and a sweatshirt instead of workwear so that you've got a garment that's pleasingly aesthetic to the eye but is more hardwearing and durable than the fabrics that are generally used in the UK market."

A changing workforce

This type of workwear is proving popular with the changing face of Britain's professional trades.

"When you look at a building site, which is where most of our products are at the moment, and compare it to 30 years ago, people in general are younger. So, in our MASCOT® YOUNG range, which is similar to our HARDWEAR range for serious tradesmen, we offer new fabric colours, contrast stitching, baggy trousers and ergonomically formed knees inspired by high street fashion."

Garments for the younger end of the market are also a key area for **Blåkläder** - Sweden's second largest workwear manufacturer, which has had a presence in the UK since 2004. "The design, cut and look of these working garments is very important and that's why we've introduced Pirate shorts, our 3/4 length knee pad shorts, and our new X1500 Craftsman Extreme knee pad trousers, which have additional functionality and are cut to fit more like a modern pair of jeans," says **Jeff Adams** from the company. "We've also recognised that there are more women being employed in the professional trades so we now have a range, including knee pad trousers and high visibility clothing, designed and cut specifically for women."

Whilst more professional tradesmen seem to be opting for the premium, highly functional image workwear, will this trend cross over into industry? Jeff says: "I think larger companies and contractors are starting to realise that if they pay more for a quality garment, it lasts longer which is

Larger companies and contractors are starting to realise that if they pay more for a quality garment, it's more cost effective, helps them to maintain a professional image and instil confidence in potential customers

Dickies
Legendary Workwear
SINCE 1922

Dickies
 SINCE 1922
LEGENDARY WORKWEAR

Tel: 01761 410041 E: uksales@dickies.com
www.dickiesworkwear.com

more cost effective, helps them to maintain a professional image and instil confidence in potential customers. The employee is also happier, more comfortable and feels more appreciated as he or she is wearing a garment designed for their specific job."

Mascot International recently picked up its first sizeable industry contract with a company that maintains mechanical lifting devices. "In Europe Mascot has been supplying into industry for years but it's quite new in the UK for a Scandinavian manufacturer to pick up an industry contract like this. But just as exciting is that we've partnered with a laundry company so that our garments are going through a rental contract and being washed through industrial laundries."

Service is another reason why Scandinavian companies seem to be hitting the mark in the UK. Blåkläder says that, by owning the factories where its garments are made, they have complete control over production methods and can ensure that quality levels are maintained. Last year also saw Mascot set up a factory in Vietnam to give them a vertically controlled operation.

More than a name

Aside from the Scandinavians, other big hitters in the UK workwear market are the brands. Leading workwear manufacturer **Dickies (UK) Ltd** offers a range of head to toe industrial and fashionable workwear for the professional tradesman as well as PPE, high visibility clothing, flame retardant garments and safety footwear. The company's sales and marketing manager, **Maurice Morton**, believes that brands will only become more important in the UK as the demand for high performance workwear increases. "Customers trust brands, it always delivers their expectations," he says. "Dickies is trusted for functional work apparel and preferred for its durability, comfort, and value."

Sales certainly appear to indicate this: in 2007, Dickies (UK) Ltd achieved record UK sales of £38 million - 20 years after entering the UK market. Partly due to this huge growth in the UK, a £3.5 million expansion programme is now underway to centre the company's European operation at its base in Midsomer Norton, Somerset. Once work on the new administrative facilities and an extension of the distribution centre is complete, the company expects to create 50 new jobs, bringing the total workforce to over 300.

"The strong brand image of the famous Dickies horseshoe logo has certainly helped sales grow in the UK," says Maurice. "Its products are now worn by film and television stars, and this has evolved it into a street fashion brand in the US, Europe, South Africa, Australia and Japan." This fashionable element will continue to be prominent in 2009. "Last year saw us launch two products from our European Fashion range of hoodies and T-shirts," he adds. "These outsold our expectations and we have expanded it into an



exciting new range of young fashionable workwear, which will be available in early 2009 along with a range of Kodiak performance safety footwear."

Having some of the world's top sportsmen and women wear its garments over its 120-year history has certainly helped to lend a cachet to **Dunlop's** workwear range. Launched in 2006, the collection is already being sold in 27 countries. But Dunlop's expertise in sportswear technologies has also proved a useful crossover for workwear, where the demand for high performing fabrics continues to grow.

Larry Pollock, managing director of Panworld Brands, which supplies Dunlop workwear in the UK, says: "We set out to create a collection of quality workwear that the customer would be just as happy wearing for work or leisure. The collection covers trousers, jackets, fleeces, vests and T-shirts, from basic fabrics to technical fabrics that are designed to cope with extreme weather conditions. These are waterproof, breathable, hi-vis, thermal insulation and moisture wicking to name a few."

Snickers Workwear recently launched its most advanced GORE-TEX® workwear collection for those working in the elements as well as its 'First Layer' range - undergarments made from wicking polyester and designed to enable tradesmen and women to work in comfort when the cold weather bites. It has also introduced a wide range of work clothes for ladies. **David Clark**, managing director of Snickers in the UK, says: "When it comes to brands, users are investing in top quality garments that are cutting-edge in terms of design, comfort, material and produced to suit all kinds of tradesmen and women wherever they are on site, whatever the working environment or weather condition."

High or low

With a definite trend towards premium quality garments, where does this leave lower quality workwear in the UK market? I think there will still be markets for both lower quality and premium quality garments," says Jeff from Blåkläder. "Some industries will always employ sub-contract workers or be subject to high staff turnover, which necessitates a market for low quality, cheaper garments."

Tim Anson from INVISTA adds: "The future of the workwear market is in well-designed, functional comfortable garments and there is room for both extremes of offerings within that. Ultimately, the market will decide based on the perceived value of the garment in the specific workplace environment."

In an increasingly competitive market, the key must be to simply offer the consumer what they want - trends are a useful way of predicting what this may be, but, of course, it isn't

Snickers Workwear has designed a range of shirts that are cut specifically for women



Dunlop workwear

an exact science. When it comes to service, though, who doesn't want their order to come through in an instant? Flexibility and efficiency - whether through online shopping or next day delivery - is fast becoming the norm in workwear, as in most other consumer markets. And, as corporate, leisure and promotional wear companies enter the workwear market alongside old hands, the stakes will only get higher and higher as they compete for sales.