

# Impact of Brexit policy on textile/clothing and footwear UK imports

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## Key words

Brexit, Clothing, Footwear, Negotiation, Textile, Uncertainty.

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## Abstract

*On 23 June 2016 the UK voted to leave the EU, (Brexit). A four year and six-month period of uncertainty ensued before Article 50 was activated. Eventually the UK-EU Trade and Cooperation Agreement (TCA) came into force on 1 May 2021. The UK retail sector, in particular the textile/clothing and footwear, relies on high levels of international importation to the UK. As the negotiations between the UK and the EU were undertaken, key elements featured in the development of the new Brexit policy. This paper examines the impact on the textile/clothing and footwear UK importation trade in relation to three of these key elements:-*

- *June 23, 2016, UK voted to leave the EU.*
- *29 March 2017 Article 50 was triggered.*
- *October 2019 Article 50 extended.*

*The data was modelled using the main five UK import partners in relation to textile/clothing and footwear from the WITS (World Integrated Trade Solution) database and the UK Office of National Statistics annual and monthly data sets, in relation to the three key elements of policy. The study provided an initial insight into the impact of policy decision making during the Brexit process. The findings show that Key elements of Brexit policy making had a negative impact on importation trade in relation to Textile/Clothing and Footwear. Further research is recommended to establish the long-term effects of Brexit policy on the UK retail economy as a whole, over the next five years. This to be extended to the export of textile/clothing and footwear from the UK to EU and Non-EU trading partners.*

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## Introduction

The United Kingdom (UK) voted on the 23 June 2016 to leave the European Union (EU). This was a significant event, the UK joined the EU in 1973, leaving would be very complex, as the UK had implemented EU law and trade policy for 43 years. Both the UK and the EU will have to negotiate a way to trade and how to apply custom borders. Bloom et al (2019).

The outcome was unexpected and resulted in the Prime Minister David Cameron resigning the next morning. Theresa May became the UK Prime Minister from 13 July 2016 to 24 July 2019, when Boris Johnson replaced Theresa May to "Get Brexit Done". UK businesses found it very difficult to be effective due to the uncertainty on how the UK was going to leave the EU, negotiations were lengthy and unresolved for over four years. Theresa May on 29 March 2017 presented the EU with a signed Article 50 which triggered a 2-year window of negotiations between the UK and the EU; on how the UK was going to withdraw from the EU. This was extended twice with the UK finally leaving the EU on 31 January 2020, with a further transitional period until 31 December 2020. Walker (2021).

During this period of consultation UK businesses were having to deal with a high level of uncertainty, making strategic planning difficult. Bloom et al (2019). The retail sector was concerned about the application of the EU customs union and the import tariffs. Lydgate, et al., (2016). A hard Brexit was considered which meant that the UK tariff system would have to adopt World Trade Organisation (WTO) tariff rules. This would increase the level of tariffs from 0 to 12 percent for some clothing, while the UK

negotiated its own Free Trade Agreements (FTA) with their importation partners. English (2018), Ries et al., (2017). The paper will investigate how this period of uncertainty affected the level of UK importation trade of textiles/clothing and footwear.

### **Literature Review**

The EU would have to negotiate a new trade policy with the UK. The uncertainty on how the UK was going to trade with the EU after December 2020 lasted for a period of four years and six months with many different policy options being considered over this time. The following are examples of trade policy issues which were uncertain during this time period.

To Remain part of the European Customs Union, (a free Customs Market), Lydgate and Winters, (2019). There was considerable speculation as to whether the UK could remain in the EU customs union or should the UK have a clean break from the EU altogether. This was a hot issue over the four years negotiation period of Brexit. The key elements were that by remaining in the customs union the rules of origin would not have to be introduced when trading between the EU and the UK. However, if the UK breaks away from the EU customs union, then it would result in expensive and lengthy customs procedures for the movement of goods, delaying goods in transit. Thus, resulting in a reduction of trade between the UK and the EU. Further, the UK will not be in control of its own negotiations re trade agreements with third countries, as this would remain with the EU. Lydgate, et al., (2016).

By becoming a member of the European Free Trade Association (EFTA), the UK could use Norway as a guide and remain part of the Single Market as a member of the European Economic Area. Bilateral agreement would be made between the UK and the EU, which currently the EU has with Switzerland and Canada; Swati et al (2017). These options became known as a Soft Brexit approach. Ries et al., (2017).

World Trade Organisation terms would govern the UK trade and EU trade, including most-favoured-nation tariffs. Swati et al (2017). This became known as a Hard Brexit option. Ries et al., (2017). If this was to be the case, then in 2016 there was prediction that tariffs would rise considerably both for imports and exports between the UK and its trading partners. Egypt being one of the highest at 30 percent and Israel the lowest under MFN at 5 percent. Holmes, Rollo, and Winters, (2016). The uncertainty on how the UK was going to resolve the EU trade arrangement was still apparent. This continued after 27 April 2021 when the European Parliament approved the EU-UK Trade and Cooperation Agreement. Bennett and Vines (2022).

Any one of the above scenarios would have a considerable impact on how the UK approached its trade policy. The UK will have to organise how the free trade agreements (FTA), would be negotiated both for the EU and Non-EU trade partners. One possibility was for the EU to allow the UK to continue to use the free trade agreements organised by the EU and have a time period to adopt these agreements into UK law. Belke et al (2017). In 2015 the EU had 51 countries with which they have negotiated FTA covering 14 percent of UK exports and 11 percent of UK imports. There was speculation that the UK would find it difficult to negotiate FTAs with so many countries and would have to adopt the WTO tariffs. Graziano, Handley and Limao (2021).

### **Uncertainty of trade agreement with EU**

During the process of Brexit from 23 June 2016 to 31 December 2020 there was uncertainty on how the UK was going to approach its trade policy. In particular how trade would flow between the EU and the UK: Could there be a Free Trade Agreement? (FTA). English (2018). It was predicted that this period of uncertainty would affect the UK economy due a lack of confidence of consumers/investors and a reduction of aggregate demand. Chang (2018). However, there is evidence that Brexit-related uncertainty was impacting trade before the referendum. Graziano, Handley and Limao (2021).

English (2018), Chang (2018), discussed at the time the situation of the UK not being able to negotiate a FTA with the EU and therefore the UK would have to pay WTO tariff rates on EU imports, which would increase on average 5.5 percent on the cost of goods coming into the UK. Due to the increase of administration on checks/inspection of goods coming into the UK. The UK would have to set tariffs rates for approx. 9000-10,000 products. Impact on imports to the UK from EU countries directly after the referendum shows that there was a downturn of exports to the UK. Fernandes and Winters (2021)

findings showed Portugal reduced exports to the UK by 5 to 7 percent following the vote. Martin, Martinez and Mejean (2019) highlight a 1.2 percent decrease in new importer/exporters trade between UK importers and French Exporters.

Eventually a Trade and Cooperation Agreement was signed on 31 December 2020, applying provisionally as of 1 January 2021 and came into force on 1 May 2021. It outlines the preferential arrangements of trade between the EU and the UK. European Commission (2020). Dhingra and Sampson, (2022), highlighted that the TCA activated customs checks, rules of origin requirements and regulatory compliance for both the UK and EU borders, on goods transferring between the UK and EU could affect trade. This will increase trade costs and possible time lags. English (2018).

### **UK Free Trade Agreements with non-EU countries**

Hantzsche, Kara and Young (2019), discussed the ability for the UK to be able to negotiate its own trade deals with third-party countries thus enabling the UK to gain the benefit of trade with countries which currently do not have a trade agreement with the EU, for example New Zealand and Australia. There was concern as to how the UK was going to approach this. The UK could negotiate with the EU for it to carry over some of the current FTAs to the UK and businesses would continue as normal. However, the EU might not agree, with the UK having to re-negotiate the agreements thus taking time to put in place. English (2018).

### **Brexit Timeline**

Over the time period between the referendum on 23 June 2016 and the final exit from the EU on 31 December 2020 there were many significant elements which featured within the final trade free agreement signed on 27 April 2021, when the European Parliament approved the EU-UK Trade and Cooperation Agreement.

#### **Timeline referencing:-**

- UK Referendum to leave the EU 23 June 2016.
- Theresa May (UK Prime Minister) triggered Article 50 for the UK to leave the EU, 29 March 2017. This starts the two-year countdown for the UK to leave the EU.
- Article 50 was extended until 30 June 2019.
- Article 50 extended again until 31 October 2019.
- Article 50 extended again until 31 January 2020.
- At 11pm on 31 January 2020, the UK left the EU and entered a transition period.
- At 11pm on 31 December 2020, the transition period ended, and the United Kingdom left the EU single market and customs union. Walker (2021).

During the time lag of the trigger of Article 50 and when the UK left the EU on 31 December 2020 there was speculation on how the UK was going to respond. One proposal was for the UK to adopt the WTO (World Trade Organisation) tariff system. This would mean that the WTO's Most Favoured Nation (MFN) rules would apply. But the UK would have to impede EU's common external tariffs without any discrimination. However, this requires negotiation with the WTO members for consent. At the time when the UK triggered Article 50 the UK did not have its own tariff system, the impact of which could lead to legal action and trade disputes. Chang (2018).

This paper will investigate if the uncertainty of the Brexit policy process had any impact on the importation to the UK of Textile/clothing and Footwear for the five main UK import partners.

### **Research Methodology**

From the referendum vote that took place on the 23 June 2016 until the UK left the EU on the 31 December 2020 there was uncertainty as to how the Brexit policy was going to be developed and its impact on trade, both with the EU and Non-EU countries.

The textile/clothing and footwear industries were investigated during the period of uncertainty 2016-2020. Due to concern that UK retailers would have to pay the full import duty on items per the World Trade Organisation minimum duty implementation if the free trade agreements could not be continued

after the UK left the EU. English (2018). The five main importing partners to the UK of textile/clothing and footwear, allocated per the World Bank, WITS (World Integrated Trade Solution) database. See tables 1 to 4. The data for the main importing partners data are selected from Office for National Statistics, (2021) and (2022), UK imports database.

### Brexit Process

The following timeline was used to highlight key elements of policy changes.

The data was modelled to key points in the Brexit process. The main elements of the process were as follows:-

- 23 June 2016 referendum.
- 29 March 2017 Article 50 was triggered, two-year countdown started.
- 10 April 2019 Article 50 was extended to 31 October 2019.
- 28 October 2019, Article 50 was extended to 31 January 2020.
- 31 January 2020 United Kingdom left the EU and entered a transition period.
- Transition period ended 31 December 2020 UK left the EU single market and customs union.
- Key dates during this period were:-
- June 23, 2016, UK voted to leave the EU.
- 29 March 2017 Article 50 was triggered.
- October 2019 Article 50 extended.

These key dates were used to assess the impact on UK imports of goods from the EU and Non-EU countries. Walker (2021). The data was reviewed to see if these key elements had any impact on the level of trade. Monthly UK importation data was evaluated over a 10-year period before the key dates of policy change to show the level of trade before the referendum as was taken up to December 2019. However, for key policy point three, October 2019 Article 50 extended, monthly data was used from October 2019 to February 2020, due to the short time period before COVID 19 started to affect trade in March 2020.

Note:- The UK left the EU on the 31 January 2020 and the transition period finished on the 31 December 2021. However, it is too soon for data to be analysed to establish the effects of the UK leaving the EU. COVID 19 will have an impact on the data between 2020 and 2021 so need to evaluate data from 2022 onwards to be able to assess the true impact of Brexit to the UK imports.

### Findings/Results

Top Five Textile/Clothing and Footwear importing partners to the UK 2015, was selected as it relates to a time period before Brexit was adopted in June 2016 with 2019 UK importing partners' trade being the final data showing (2020 not yet available within the World Integrated Trade Solution (WITS) database).

The main UK import partners in 2015 before in relation to textile and clothing were:-

Table 1	Trade Value	%
	US\$ '000	of UK trade
China	8,868,523.78	25.51
Bangladesh	3,310,266.71	9.52
Turkey	2,707,610.11	7.79
India	2,430,494.00	6.99
Italy	1,776,040.77	5.11
183 partners	15,663,750.50	45.08
	34,756,685.90	100

Source:- Worldbank (2019).

The five main trading partners, China, Bangladesh, Turkey, India and Italy were investigated to see if key points of the Brexit decision making process had any effect on the importation trade of clothing.

This process was repeated to find the main UK import partners in 2019 to enable comparison to see if there has been any significant change in levels of trade over the Brexit policy period.

Table 2 showed there was no change in main import partners in 2019 of textile/clothing:-

Table 2	Trade Value	%
	US\$ '000	of UK trade
China	6,440,933.55	19.78
Turkey	2,329,830.88	7.16
Italy	2,218,221.72	6.81
India	1,983,129.12	6.09
Bangladesh	3,729,889.19	11.46
183 partners	15,809,768.01	48.70
	32,511,772.47	100

Source:- Worldbank (2019).

Over the Brexit policy making time period there is a significant drop of 6.45 percent importation of textile and clothing into the UK of \$2,244,913.43. This suggests that the uncertainty of Brexit policy over this time period may have had an impact on the importation to the UK of textile/clothing.

Table 3:- UK import partners 2015, before Brexit, in relation to footwear:-

Table 3	Trade Value	%	%
	US\$ '000	of UK imports	Country exports
China	2,842,164.96	35.02	4.51
Vietnam	716,913.35	8.83	14.69
Italy	681,621.84	8.40	2.72
Netherlands	554,256.89	6.83	1.17
Belgium	549,652.35	6.77	1.75
183 partners	276,584.83	34.15	
	5,621,194.22	100	

Source:- Worldbank (2019).

The five main trading partners were investigated to see if key points of Brexit decision making impacted importation of footwear. This process was repeated for 2019 to enable comparison to establish any significant change in levels of trade over the Brexit policy making period.

Table 4:- UK import partners 2019, after Brexit, in relation to footwear:-

Table 4	Trade Value	%	%
	US\$ '000	of UK imports	Country exports
China	2,078,262.92	26.58	3.17
Netherlands	844,076.05	10.79	1.57
Italy	838,283.64	10.72	3.19
Belgium	657,233.47	8.4	2.04
Germany	657,057.59	8.4	0.77
183 partners	2,738,236.27	35.11	
	7,813,149.94	100	

Source:- Worldbank (2019).

Note:- Vietnam was the 2<sup>nd</sup> largest import partner to the UK in 2015, by 2019 Vietnam reduced its market share to 9.89 percentage USD \$595,435.66, ranked at 6<sup>th</sup> UK import footwear listing.

Between the two data points of 2015 and 2019 the importation of footwear shows a significant increase of \$2,191,955.72, being 39 percent. On this initial data instead of the Brexit uncertainty affecting importation of footwear, the UK has increased its trade.

### Individual Countries

Figures 1 and 2 show the levels of imports from each of the main five UK import partners starting in the month time period the policy data point was activated, covering annual periods from 2006 to 2020. The timeline started with 2006, ten years before Brexit providing a continuity point before the Brexit uncertainty.

#### Key Policy Point one:- June 23, 2016, UK voted to leave the EU

June 2020 was excluded from the overall movement analytical investigation due to the impact of COVID 19, which large quantities of PPE imported from China impacting 2020 results.

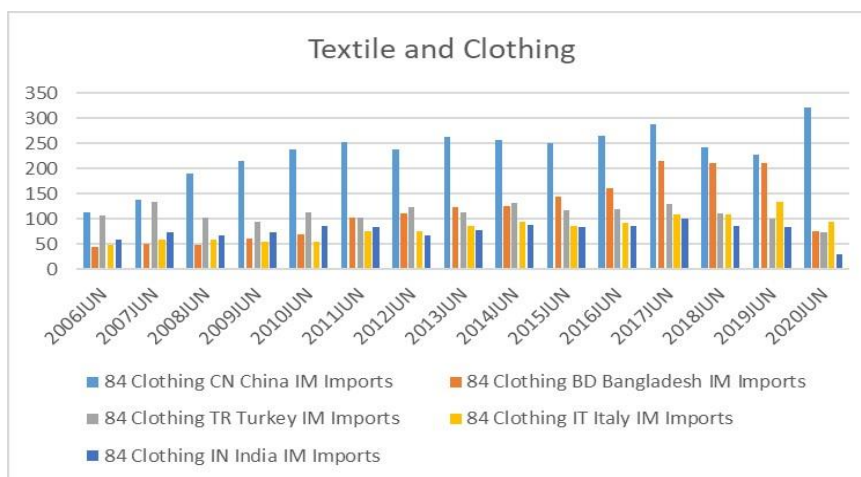


Figure 1 Textile and Clothing

Source:- (Office for National Statistics, (2021)/(2022))

The movement of trade from June 2016 to June 2017 shows an increase of 16.46 percent. However, it decreased by 9.87 percent from June 2017 to June 2018. This decrease continues June 2018 to June 2019 by a further 0.31 percent, showing there is impact on UK importation trade for textile/clothing.

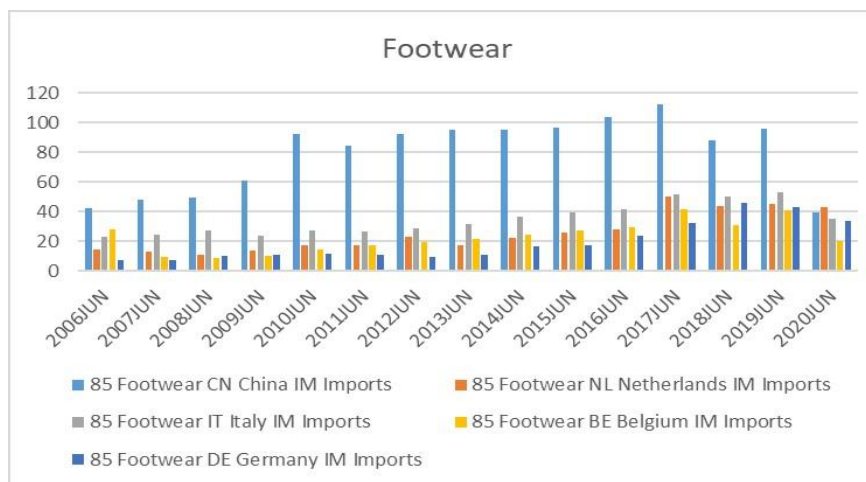


Figure 2 Footwear

Source:- (Office for National Statistics, (2021)/(2022))

Movement of trade in footwear from June 2016 to June 2017 increased by 10.60 percent but the level of trade decreased by 10.61 percent from June 2017 to June 2018. However, the levels increased over June 2018 to June 2019 by 7.83 percent.

The formula used to calculate correlation was the Pearson product moment correlation coefficient:-

$$r = \frac{\sum(x - \bar{x})(y - \bar{y})}{\sqrt{\sum(x - \bar{x})^2 \sum(y - \bar{y})^2}}$$

Where x is the movement of UK importation of textile/clothing from June 2016 - June 2019 and y is the movement of UK importation of footwear from June 2016 - June 2019, r = the coefficient of correlation between the importation of textile/clothing and footwear into the UK over the time period 2016- 2019. The correlation was strong at 0.74.

Key Policy Point Two:- 29 March 2017 Article 50 was triggered.

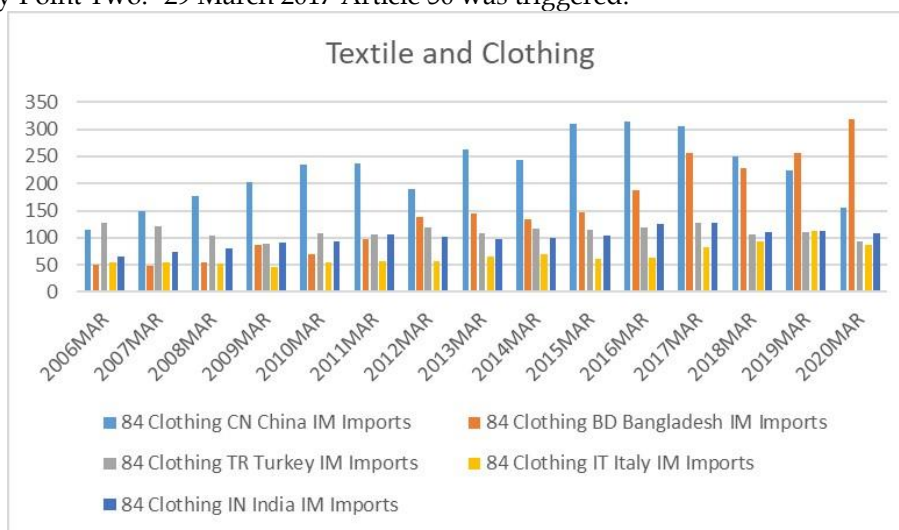


Figure 3 Textile/Clothing

Source:- (Office for National Statistics, (2021)/(2022)

Within figure 3 importation of textiles and clothing rose with each of the five main importing countries totalling 11.13 percent between March 2016 and March 2017. However, March 2018, 12 months after Article 50 being triggered, importation of textiles and clothing decreased over all by 12.52 percent. March 2019 showed some recovery of imports as they increased by 3.89 percent. This shows the impact between the trigger of article 50 and importation of textile and clothing goods.

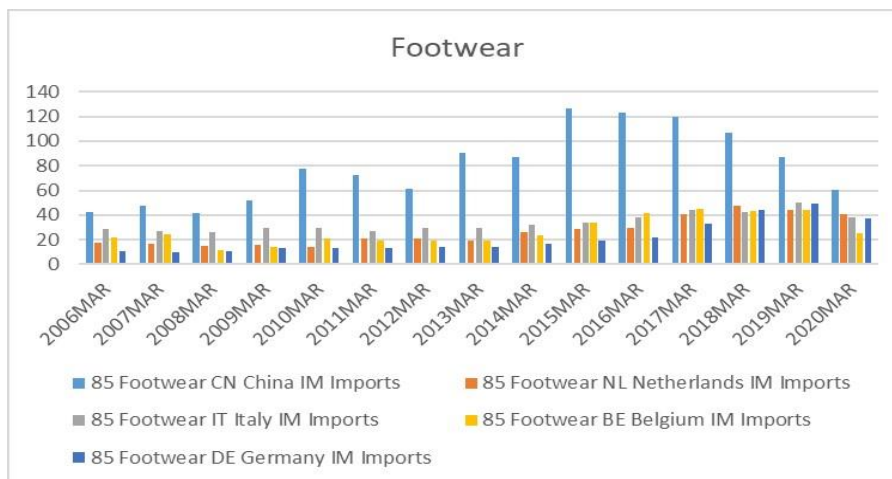


Figure 4 Footwear

Source:- (Office for National Statistics, (2021)/(2022)

On reviewing the footwear data, the movement percent fell from 11.48 percent increase of imports between 2016-2017 to 0.45 percent between March 2017 and March 2018. However, there was an increase in import trade from March 2018 to March 2019 of 2.86 percent. The Pearson Product Moment correlation

coefficient formula was implemented to measure the correlation between the UK movement of import trade for textile/clothing and footwear:-

Where  $x$  = UK import movement of trade from 2017 to 2019 for Textile/clothing and  $y$  = UK import movement of trade for footwear  $r$  = the coefficient of correlation between the UK importation of textile/clothing and footwear over the time period 2016-2019.

There is a strong correlation between the textile/clothing and footwear for March 2017 to March 2019 of 0.86. Suggesting that the trigger of Article 50 did have an impact on the UK import trade for Textile/clothing and Footwear.

Key Policy Point Three:- October 2019 Article 50 extended.

October 2019 article 50 came into place. This is very recent, and data is limited due to COVID starting to take effect in March 2020. To measure the impact the data has been analysed on a month-by-month basis from October 2019 to February 2020. Further research will need to be undertaken when the trade data becomes available from 2022, as the global supply chains become more sustainable after COVID 19.



Figure 5 Textile/Clothing

Source:- (Office for National Statistics, (2021)/(2022))

Textile/clothing UK imports trade was investigated to see if there was any impact of the Key Policy Point Three; UK extended article 50 to 31 January 2020, in October 2019. After this change in Brexit policy, November 2019 saw a drop in UK import trade across all five countries of 24.4 percent. This continued into December 2019 with a further decrease of 12.2 percent. However, in January 2020 there was a slight increase of UK imports of textile/clothing of 1.7 percent, only to fall by 20.1 percent in February 2020 after the UK article 50 ended.



Figure 6 Footwear

Source:- (Office for National Statistics, (2021)/(2022))



The UK importation of footwear was also investigated to see if there was any impact on the level of trade due to the change of Brexit policy of extending the UK/EU article 50 in October 2019 to 31 January 2020. There was a decrease of UK importation of footwear in November 2019 of 16.2 percent. This continued in December 2019 with a further fall of 10.7 percent. However, in January 2020 there was an increase of 17.5 percent. February 2020 shows a fall of 7.1 percent, this was after 31 January when the UK broke away from the EU. Incorporating the Pearson Product Moment Correlation coefficient formula:-

Where  $x$  = UK import movement of trade from October 2019 to February 2020 for Textile/clothing and  $y$  = UK import movement of trade from October 2019 to February 2020 for footwear  $r$  = the coefficient of correlation between the UK importation of textile/clothing and footwear over the time period October 2019 to February 2020. There is a strong correlation between the textile/clothing and footwear for October 2019 to February 2020 of 0.68.

### Discussion and Conclusion

Tables 1 and 2 show the level of UK importation trade for textile/clothing. By comparing the levels of trade before Brexit at 2015, after the referendum and during the Brexit consultation period 2019, there was a drop of 6.45 percent on overall importation of textile/clothing. This does correlate with the suggestion that Brexit Policy uncertainty did have an impact on import trade. Chang (2018), English (2018). However, table 3 and 4 show that UK footwear importation resulted in an increase of trade between 2015 and 2019 of 39 percent. Interestingly, China's imports fell by 8.44 percent while Italy, Netherlands and Belgium importation to the UK rose collectively by 7.91 percent. Germany increased its trade in 2019. European partners were increasing their trade with the UK within footwear. More research is required into the data to gain further understanding of these results.

Looking at the detailed analysis of the textile/clothing and footwear in relation to the three key policy points:-

**Key Policy Point One:- 23 June 2016 UK Voted to lead the EU**

Figures 1 and 2 show the annual movement for June of UK importation trade for textile/clothing and footwear. While there was an increase of UK import trade between 2016 and 2017, there was a decrease of UK import trade of 9.87 percent for 2017-2018 and this continued in 2019 with a further decrease of 0.31 percent. The import trade of footwear increased between 2016 and 2017 of 10.60 percent but this also fell by 10.61, 2017-2018, but it rose by 7.83 percent in 2019. This suggests that the textile/clothing sector was affected by the referendum vote more than the footwear sector. A strong correlation of the results between the Textile/clothing and footwear of 0.74 shows how interlinked the sectors are.

### Key Policy Point Two:- 29 March 2017 Article 50 was triggered

Figures 3 and 4 show the annual movement for March of the UK importation trade for textile/clothing and footwear. There was a decrease of 12.52 percent in relation to textile/clothing and footwear only increased by 0.45 percent compared to 11.48 percent increase 2016-2017. However, both textiles/clothing and footwear increased by 3.89 percent and 2.86 percent respectively, again a strong correlation of 0.86 infers the positive relationship between textile/clothing and footwear sectors, March 2017- March 2019.

### Key Policy Point Three:- October 2019 Article 50 extended

Figures 5 and 6 show the monthly movement of the level of UK importation for textile/clothing and footwear from October 2019 to February 2020. Both the textile/clothing and footwear sectors showed a decrease in trade of 24.4 percent and 16.2 percent in November 2019 and a further decrease in December 2019 of 12.2 and 10.7 percent before a slight increase in January 2020 of 1.7 percent for textile/clothing and a large increase of 17.5 percent for footwear. However, after article 50 was activated on 31 January 2020 both sectors decreased in February 2020 with textile/clothing having a significant drop of 20.1 percent and footwear 7.1 percent. There was a strong correlation between textile/clothing and footwear trade of 0.68.

### Research Implications

The research clearly shows that Brexit policy decision making between 2016 and 2021 provided a negative impact to the volume of importation of Textile/Clothing and Footwear. Further research is recommended to establish the long-term effects of Brexit policy on the UK retail economy as a whole, over the next five years. To be extended to the export of textile/clothing and footwear between EU and Non-EU trading partners.

### Conclusion

Overall, the initial research has shown that there has been a negative impact in relation to the three key policy points on the UK importation of textile/clothing and footwear. This suggests that import trade was affected by uncertainty as suggested by English (2018)/Chang 2018. Due to COVID 19 occurring in March 2020 this has made it difficult to ascertain the immediate impact in relation to the UK leaving in January 2020. However, the findings clearly allow scope for further research within this area and to extend to the export trade of Textile/Clothing and Footwear to EU and Non-EU trading partners.

### Limitations/Direction for future research

Key policy point three; October 2019 article 50 came into place. This is very recent, and data is limited due to COVID starting to take effect in March 2020. Therefore, to measure the impact the data has been analysed on a month-by-month basis from October 2019 to February 2020. Further research will need to be undertaken when trade data becomes available from 2022 and global supply chains are more sustainable after COVID 19.

Further research undertaken over the next five years to ascertain the effect of Brexit on UK importation trade as the global supply chain recovers from COVID 19.

Further research is required to establish the increase of the European partners importation into the UK of footwear from 2015 to 2019.

Further investigation of the importation of textile/clothing and footwear from EU-27 countries during the period of policy uncertainty between the UK and the EU.

Future research is required to investigate if Brexit key policy points have affected the exporting partnerships of the UK including the EU and Non-EU partners, within the textile/clothing and footwear sectors.

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