



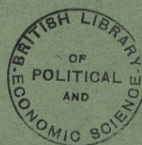
BOARD OF TRADE

FINAL REPORT
on the
CENSUS OF PRODUCTION
FOR 1948

Volume 10

Trade G

Wallpaper



*Presented by the Board of Trade to Parliament
in pursuance of the Statistics of Trade Act, 1947
(10 & 11 Geo. 6, Ch. 39, Sec. 7).*

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In interpreting the data in the following tables, it is essential to bear in mind not only the qualifications mentioned in this report but also the general explanations and qualifications contained in the separate booklet published in this series by H.M. Stationery Office entitled "Final Reports of the Census of Production for 1948: Introductory Notes", price 2s Od. NET

List of Tables

| Table No. | Title | Page. |
|-----------|---|---------|
| 1 | Summary: Larger establishments | 10/G/2 |
| 2 | Summary, 1948: Small firms in Great Britain | 10/G/3 |
| 3 | Estimated average employment, 1948: All firms in Great Britain | 10/G/3 |
| 4 | Analysis by size, 1948: Larger establishments in Great Britain | 10/G/3 |
| 5 | Analysis by standard region, 1948: Larger establishments in Great Britain | 10/G/4 |
| 6 | Analysis according to specialisation within the trade, 1948: Larger establishments in Great Britain | * |
| 7 | Total make of intermediate products: Larger establishments | * |
| 8 | Sales (or production) of the principal products of the trade, including sales (or production) of these products by establishments classified to other trades: Larger establishments | 10/G/5 |
| 9 | Sales (or production) of principal products of the trade by establishments classified to other trades: Larger establishments | 10/G/5 |
| 10 | Sales (or production) in the trade of other than principal products: Larger establishments | 10/G/6 |
| 11 | Analysis of sales, 1948: Larger establishments in Great Britain | 10/G/6 |
| 12 | Production, exports and imports of certain principal products: Larger establishments | 10/G/7 |
| 13 | Purchased materials and fuel: Larger establishments | 10/G/8 |
| 14 | Stocks of finished products and work in progress and stocks of materials and fuel, 1948: Larger establishments in Great Britain | 10/G/9 |
| 15 | Employment and remuneration: Larger establishments | 10/G/10 |
| 16 | Wages and salaries paid, 1948: Larger establishments in Great Britain | 10/G/11 |
| 17 | Payments for work done on materials given out, 1948: Larger establishments in Great Britain | 10/G/11 |
| 18 | Payments for certain services, 1948: Larger establishments in Great Britain | 10/G/12 |
| 19 | Plant, machinery and vehicles acquired and disposed of, 1948: Larger establishments in Great Britain | 10/G/12 |
| 20 | Capital expenditure on building work and changes in occupation of buildings and land, 1948: Larger establishments in Great Britain | 10/G/13 |

Country Tables

| Table No. | Title | Page |
|-------------|--|---------|
| 21 | Summary: Larger establishments | 10/G/14 |
| 22 | Summary: Small firms | 10/G/14 |
| 23 or 23(1) | Sales in the trade: Larger establishments | 10/G/14 |
| 23(11) | Sales in the trade: Small firms | * |
| 24 or 24(1) | Purchased materials and fuel: Larger establishments | 10/G/15 |
| 24(11) | Purchased materials and fuel: Small firms | * |
| 25 or 25(1) | Employment and remuneration: Larger establishments | 10/G/15 |
| 25(11) | Employment: Small firms | * |
| 26 | Monthly index of employment of operatives: Larger establishments | 10/G/15 |

* Not applicable to this trade

WALLPAPER

10/G/1

WALLPAPER TRADE

THIS REPORT on the Wallpaper Trade relates to establishments engaged wholly or mainly in the manufacture of wallpaper.

This trade corresponds to minimum list heading 181 in the Standard Industrial Classification.

Any establishments in Northern Ireland are excluded in 1948; no production was recorded there in this trade for 1937 or 1935.

TABLE 1

| | 1948 | 1937 | 1935 |
|--|-----------------|--------------|--------------|
| | £'000 | £'000 | £'000 |
| Gross output (production) | 5,316 | 3,356 | 3,264 |
| Cost of materials and fuel used | 2,311 | 1,278 | 1,261 |
| Payment for work done on materials given out | 28 | 13 | 16 |
| Net output | 2,978 | 2,065 | 1,987 |
| Wages and salaries of persons employed | 1,189 | .. | .. |
| Average number of persons employed (a) | No. 3,931(b) | No. 6,437 | No. 6,096 |
| Net output per person employed (a) | £ 758 | £ 321 | £ 326 |
| Stocks at end of year | £'000 | £'000 | £'000 |
| Finished products and work in progress | 291 | .. | .. |
| Materials and fuel | 361 | .. | .. |
| Number of establishments | No. 30 | No. .. | No. 37 |

(a) Excluding outworkers.

(b) For the average number of persons employed in this trade see Table 3.

The values of gross output and of materials and fuel used are derived in the following way:-

| | 1948 | 1937 | 1935 |
|--|-------|-------|-------|
| | £'000 | £'000 | £'000 |
| Output of firms in this trade | | | |
| Total value of sales (1948) or production (1937 and 1935) | | | |
| Principal products (see Table 8) | 5,323 | 3,320 | 3,234 |
| Other output (see Table 10) | 27 | 36 | 30 |
| Adjustment for changes in stocks and work in progress (see Table 14) | + 59 | .. | .. |
| | 5,409 | 3,356 | 3,264 |
| Less payment for transport by other firms | 92 | | |
| Gross output (production) | 5,316 | 3,356 | 3,264 |
| Materials and fuel used by firms in this trade | | | |
| Purchases (see Table 13) | 2,358 | 1,278 | 1,261 |
| Adjustment for changes in stocks (see Table 14) | - 48 | | |
| Materials and fuel used | 2,311 | 1,278 | 1,261 |

TABLE 2

| | |
|--|----|
| Number of returns | 4 |
| Average number of persons employed (a) | |
| Males | 14 |
| Females | 8 |
| Total | 22 |

(a) Including working proprietors.

Estimated average employment, 1948

All firms in Great Britain

TABLE 3

| | |
|---|-------|
| As returned by firms | |
| Employing on average more than ten persons (a) | 3,931 |
| Employing on average ten persons or less (b) | 22 |
| Estimated average employment in firms not making satisfactory returns | 3,953 |
| Average employment in all firms | - |
| | 3,953 |

(a) See Tables 1 and 15.

(b) See Table 2.

Analysis by size, 1948

Larger establishments in Great Britain

TABLE 4

| Average number employed | Establishments | Gross output | Net output | Persons employed | Remuneration | | | Net output per person employed |
|-------------------------|----------------|--------------|------------|------------------|--------------|----------|-------|--------------------------------|
| | | | | | Wages | Salaries | Total | |
| | No. | £'000 | £'000 | No. | £'000 | £'000 | £'000 | £ |
| 11-24 | 4 | 100 | 51 | 69 | 14 | 4 | 19 | 737 |
| 25-49 | 5 | 258 | 182 | 173 | 35 | 18 | 53 | 1,050 |
| 50-749 | 21 | 4,958 | 2,746 | 3,689 | 765 | 353 | 1,118 | 744 |
| Total | 30 | 5,316 | 2,978 | 3,931 | 814 | 375 | 1,189 | 758 |

Analysis by standard region, 1948

Larger establishments in Great Britain

TABLE 5

| Region | Establishments | Gross output | Net output | | Persons employed | Remuneration | | |
|---|----------------|--------------|------------|---------------------|------------------|--------------|----------|-------|
| | | | Value | Percentage of total | | Wages | Salaries | Total |
| | No. | £'000 | £'000 | | No. | £'000 | £'000 | £'000 |
| England | | | | | | | | |
| London and South Eastern | 9 | 1,502 | 839 | 28.2 | 1,379 | 293 | 119 | 412 |
| North Western; East and West Ridings of Yorkshire; North Midland; Eastern; and Southern | 21 | 3,815 | 2,139 | 71.8 | 2,552 | 521 | 256 | 777 |
| Wales | - | - | - | - | - | - | - | - |
| Scotland | - | - | - | - | - | - | - | - |
| Great Britain | 30 | 5,316 | 2,978 | 100.0 | 3,931 | 814 | 375 | 1,189 |

TABLE 6 - Analysis according to specialisation within the trade, 1948

Larger establishments in Great Britain

No specialisation within this trade was distinguished.

TABLE 7 - Total make of intermediate products: Larger establishments

This table is not applicable to the trade.

Sales (or production) of the principal products of the trade, including sales (or production) of these products by establishments classified to other trades

Larger establishments

TABLE 8

| | 1948 Sales | | | 1937 Production | | 1935 Production | | |
|--|-------------------------|-------------------|-----------------------|-----------------|----------|-----------------|----------|-----------|
| | Quantity | | Value | Entries | Quantity | Value | Quantity | Value |
| | Th. rolls | Th. cwts | £'000 | No. | Th. cwt. | £'000 | Th. cwt. | £'000 |
| Wallpaper | | | | | | | | |
| Paper hangings, printed and/or embossed | { 36,224 2,814 .. | { 450 | { 4,148 306 446 | { 28 | 1,091 | 3,181 | 1,080 | 3,099 (a) |
| Heavy relief goods of the lincrusta and anaglypta type, i.e., not made on wallpaper machines | { 689 .. | { | { 192 24 | { .. | 44 | 139 | 48 | 152 |
| Plain lining paper hangings | 4,131 | 37 | 166 | 13 | .. | (b) | .. | (b) |
| Retail pattern books | | .. | 4 | 8 | | | | |
| Waste products, other than paper | | .. | - | 6 | .. | (b) | .. | (b) |
| Work done for the trade or on commission | | | 37 (c) | 7 | | | | |
| Total | | | 5,323 | 29 | | 3,320 | | 3,251 |
| Less sales (or production) in other trades (See Table 9) | | | - | - | | - | | 17 |
| Total principal products of this trade sold or made by establishments in the trade | | | 5,323 | 29 | | 3,320 | | 3,234 |

(a) Including £17,000 returned in another trade.

(b) Not recorded separately.

(c) Amount charged.

TABLE 9 - Sales (or production) of principal products of the trade by establishments classified to other trades: Larger establishments

No sales (or production) of principal products by establishments classified to other trades were recorded for 1948 or 1937; production in 1935 amounted to £17,000.

Sales (or production) in the trade of other than principal products

Larger establishments

TABLE 10

| | 1948 Sales | | 1937 Production | 1935 Production |
|---------------------------|------------|-------|-----------------|-----------------|
| | Quantity | Value | Value | Value |
| | Th. tons | £'000 | £'000 | £'000 |
| Goods made | .. | 17 | 36 | 30 |
| Waste paper, sold as such | 2.5 | 9 | | |
| | .. | 1 | | |
| Total | | 27 | 36 | 30 |

Analysis of sales, 1948

Larger establishments in Great Britain

TABLE 11

| | Sales | Percentage of total sales |
|--|----------|---------------------------|
| | £'000 | |
| Sales (or transfers) to other organisations under the same control | 1,402 | 28.4 |
| Sales to independent buyers | | |
| Exports invoiced directly overseas | 382 | 7.2 |
| Exports invoiced to Crown Agents and purchasing houses in this country of individual firms and governments abroad | - | - |
| Manufacturers, repairers, builders, mines, public utilities, and transport and other productive undertakings including His Majesty's Government and Local Authorities (other than productive establishments) | 29 | 0.5 |
| Wholesalers, merchants and other agents for resale | 1,871(a) | 35.2 |
| Retailers, including multiple shops, caterers and N.A.A.F.I., for resale | 1,616 | 30.4 |
| Other businesses (including farmers) and institutions of all kinds | - | - |
| Members of the public, including employees | 13 | 0.2 |
| Total sales to independent buyers | 3,911 | 73.6 |
| Total | 5,313 | 100.0 |

(a) Of this total £1,804,000 was recorded as divided between £8,000 for export and £1,796,000 for other sales.

Production, exports and imports of certain principal products (a)

TABLE 12

| | | Production (b) | Exports (c) | Retained imports (d) |
|--|--------|----------------|-------------|----------------------|
| | | £'000 | £'000 | £'000 |
| | | Wallpaper | | |
| Paper hangings, printed and/or embossed | { 1948 | 4,900 | 477 | 15 |
| | { 1937 | 3,181 | 255 | 43 |
| Heavy relief goods of the lincrusta and anaglypta type, i.e., not made on wallpaper machines | { 1948 | 215 | 1 | - |
| | { 1937 | 139 | 3 | 5 |
| Total Wallpaper | { 1948 | 5,115 | 478 | 15 |
| | { 1937 | 3,320 | 258 | 48 |

(a) Figures of sales (or production) refer only to larger establishments in the relevant years. All recorded exports from and imports into the United Kingdom are given in the table. The figures therefore are not strictly comparable.

(b) Sales in 1948 and production for sale in 1937.

(c) Valued f.o.b.

(d) Valued c.i.f.

Purchased materials and fuel

Larger establishments

TABLE 13

| | 1948 | | 1937 | | 1935 | |
|--|------------------------------|-------|---------------------------------------|--------|-------------------------|--------|
| | Materials and fuel purchased | | Usage of purchased materials and fuel | | | |
| | Quantity | Cost | Quantity | Cost | Quantity | Cost |
| | Th. cwts. | £'000 | Th. cwts. | £'000 | Th. cwts. | £'000 |
| Materials | | | | | | |
| Base paper for wallpaper (long elephants) | 457.2 | 1,087 | 1,082 | 746(a) | 1,019 | 665(a) |
| All other purchased paper (except packing materials) | 72.5 | 218 | | | | |
| | .. | 138 | | | | |
| Packing materials | | 30 | | 11(b) | | (c) |
| Pigment colour | 16.9 | 95 | | | | |
| | .. | 68 | | | | |
| Dyes and dyestuffs | .. | 10 | | | | |
| China clay | 96.5 | 37 | | | | |
| Fixatives and adhesives | | 161 | | | | |
| Wooden rollers | | | .. | 464 | .. | 552 |
| Cut print rollers ready for use | | 35 | | | | |
| Other | | 11 | | | | |
| All other purchased materials | | 333 | | | | |
| Fuel and electricity | Th. tons | | Th. tons | | Th. tons | |
| Coal | 9.6 | 30 | 29.5 | 35 | 27.5 | 30 |
| Coke | 0.5 | 2 | | (c) | 1.6 | 2 |
| Electricity purchased | Th. B. T. U. (kW. hrs.) | | Th. B. T. U. (kW. hrs.) | | Th. B. T. U. (kW. hrs.) | |
| From public supply | 2,825 | 16 | 2,711 | 13 | 2,397 | 12 |
| From other sources | - | - | | | | |
| Electricity obtained from other works under the same ownership | - | - | | | | |
| Motor spirit (petrol) and derv. fuel | Th. galls. | | | | | |
| Used for road vehicles | 47 | 5 | | | | |
| Used for other power purposes | .. | 3 | | | | |

TABLE 13 (contd.)

| | 1948 | | 1937 | | 1935 | |
|--|------------------------------|-------|---------------------------------------|-------|----------|-------|
| | Materials and fuel purchased | | Usage of purchased materials and fuel | | | |
| | Quantity | Cost | Quantity | Cost | Quantity | Cost |
| | Th. galls | £'000 | | £'000 | | £'000 |
| Fuel and electricity (contd.) | | | | | | |
| Other oil fuel (including creosote/pitch mixtures) | 2,229 | 73 | } | 9 | | (c) |
| | Th. therms | | | | | |
| Gas purchased | 38.5 | 2 | | | | |
| All other purchased fuel | .. | 4 | | | | |
| Total | | 2,358 | | 1,278 | | 1,261 |

(a) Described as "Plain paper".

(b) Described as "Packing cases and crates, including materials therefor".

(c) Not recorded separately.

Stocks of finished products and work in progress and stocks of materials and fuel, 1948

Larger establishments in Great Britain

TABLE 14

| | At beginning of year | | | At end of year | | |
|--|----------------------|-----------|-----------|----------------|-----------|-------|
| | Quantity | | Value | Quantity | | Value |
| | Th. rolls | Th. cwts. | £'000 | Th. rolls | Th. cwts. | £'000 |
| Finished products | | | | | | |
| Wallpaper | 4,484 607 | 54 | 168 27 | 6,037 | 74 | 252 |
| Other finished products | | .. | | | | |
| Work in progress | | | 30 | | | 32 |
| Total finished products and work in progress | | | 232 | | | 291 |
| Materials and fuel | | | | | | |
| Paper | 1.8 | .. | 92 | 1.8 | .. | 105 |
| Other descriptions of materials and fuel | | .. | 210 | | | |
| Total materials and fuel | | | 314 | | | 361 |

Employment and remuneration (a)

Larger establishments

TABLE 15

| | Average number of operatives | | | Administrative, technical and clerical employees (b) | | | Total | | |
|--------------------|------------------------------|-------|-------|--|-------|-------|--------------------|-------|-------|
| | 1948 | 1937 | 1935 | 1948 | 1937 | 1935 | 1948 | 1937 | 1935 |
| Males | | | | | | | | | |
| Under 18 | 257 | 528 | 463 | 24 | 82 | 60 | 281 | 610 | 523 |
| All ages | 2,464 | 3,423 | 3,314 | 481 | 765 | 722 | 2,945 | 4,188 | 4,036 |
| Females | | | | | | | | | |
| Under 18 | 133 | 590 | 600 | 48 | 80 | 41 | 181 | 670 | 641 |
| All ages | 761 | 1,909 | 1,768 | 222 | 340 | 292 | 983 | 2,249 | 2,060 |
| Total | | | | | | | | | |
| Under 18 | 390 | 1,118 | 1,063 | 72 | 162 | 101 | 462 | 1,280 | 1,164 |
| All ages | 3,225 | 5,332 | 5,082 | 703(c) | 1,105 | 1,014 | 3,928(c) (d)(e) | 6,437 | 6,096 |
| Total remuneration | £'000 | | | £'000 | | | £'000 | | |
| | 814 | .. | .. | 375 | .. | .. | 1,189 | .. | .. |

(a) Excluded employees. The following numbers were employed at establishments in this trade but are not included in the table or in any other report (e.g., employees in a separate selling or transport organisation for which separate accounts are kept):-

| | | | | |
|-----------------|---|-------|----|---------|
| Canteen workers | 8 | males | 61 | females |
| Other workers | 7 | males | 9 | females |

(b) Number at September 25, 1948, October 16, 1937, and October 12, 1935.

(c) There were, in addition, 3 male working proprietors in 1948. Working proprietors are included in the 1937 and 1935 figures.

(d) The employers' share of contributions to all National Insurance Schemes payable during the year in respect of these workers amounted to £25,000.

(e) The following persons (included in this total) were employed on special work by establishments employing 100 or more persons:-

| | Operatives | Administrative, and technical and clerical employees |
|--|------------|--|
| Transport of goods outside the premises | 33 | |
| Maintenance and repair of firms' buildings but not plant | 22 | |
| Research work not directly connected with current production however charged | - | - |

In addition to the employees in the above table the firms in this trade employed 5 male and 10 female outworkers in 1948, the amount paid to them being £3,000. Similar information is not available for 1937 and 1935.

Wages and salaries paid, 1948 (a)

Larger establishments in Great Britain

TABLE 16

| | Amount paid by all establishments | Establishments making returns for the year ended June, 1948 | | | | | |
|--|-----------------------------------|---|---|----------------|---------------|----------------|-------|
| | | Amount paid | Percentage of annual remuneration paid in | | | | |
| | | | First quarter | Second quarter | Third quarter | Fourth quarter | Year |
| Wages and salaries of | £'000 | £'000 | | | | | |
| Operatives | 814 | 638 | 26.6 | 24.7 | 24.2 | 24.5 | 100.0 |
| Administrative, technical and clerical employees | 375 | 295 | 25.4 | 24.9 | 24.8 | 24.9 | 100.0 |
| Total | 1,189 | 931 | 26.2 | 24.8 | 24.4 | 24.6 | 100.0 |

(a) Including bonus and commission payments.

Note:- The establishments making returns for the year ended June, 1948, were responsible for over three quarters of the employment in the trade.

TABLE 17 - Payments for work done on materials given out, 1948

Larger establishments in Great Britain

The total amount paid for work done on materials given out was £28,000.

Payments for certain services, 1948
Larger establishments in Great Britain

TABLE 18

| | Amount paid |
|---|-------------|
| | £'000 |
| Repair and maintenance | |
| Of buildings | 30 |
| Of plant, machinery and vehicles | 49 |
| Unclassified | 61 |
| Hire of plant, machinery and vehicles | 6 |
| Advertising and market research | 3 |
| Payments made for research work | - |
| Postage, telephone, telegrams and cables | 12 |
| Commercial insurance premiums | 33 |
| Rates (excluding water rates) payable in the year | 13 |

Plant, machinery and vehicles acquired and disposed of, 1948
Larger establishments in Great Britain

TABLE 19

| | Acquisitions | | Disposals |
|---------------------|--------------|-------------|-----------|
| | New | Second-hand | |
| | £'000 | £'000 | £'000 |
| Plant and machinery | 81 | 3 | 1 |
| Vehicles | 14 | 3 | 2 |
| Total | 95 | 6 | 3 |

Capital expenditure on building work and changes in
occupation of buildings and land, 1948

Larger establishments in Great Britain

TABLE 20

| | £'000 | £'000 |
|--|-------|-------|
| 1. Capital expenditure on building work (a) | | 13 |
| 2. Existing buildings and land (b) | | |
| (1) Capital cost of freeholds bought and estimated capital value of rented property newly occupied in the year (c) | 65 | |
| (11) Leasehold buildings and land newly occupied in the year | - | |
| Total of heading 2 | | 65 |
| Total of headings 1 and 2 | | 78 |
| 3. Existing buildings and land relinquished | | - |
| 4. Headings 1 and 2 less heading 3 | | 78 |

(a) Excluding site value, which, where appropriate, is included in heading 2 (1).

(b) The figures do not reflect changes in ownership of previously occupied land and buildings.

(c) Property which is occupied under an agreement for the payment of rent without the purchase of a lease or the payment of a premium.

WALLPAPER TRADE

1948

Note:- There were no establishments in Scotland and Wales in the register for this trade.

TABLE 21 - Summary: Larger establishments

See Table 1.

TABLE 22 - Summary: Small firms

See Table 2.

Sales in the trade
Larger establishments

TABLE 23

| | Great Britain | | |
|--|---------------|-----------|-------|
| | Quantity | | Value |
| | Th. rolls | Th. cwts. | £'000 |
| Principal products | | | |
| Wallpaper | | | |
| Paper hangings, printed and/or embossed | 36,224 | 450 | 4,148 |
| | 2,814 | .. | 308 |
| | .. | .. | 448 |
| Heavy relief goods of the lincrusta and anaglypta type, i.e., not made on wallpaper machines | 689 | .. | 192 |
| | .. | .. | 24 |
| Plain lining paper hangings | 4,131 | 37 | 166 |
| Retail pattern books | | .. | 4 |
| Waste products, other than paper | | .. | - |
| Work done for the trade or on commission | | | 37(a) |
| Total principal products | | | 5,323 |
| Other output | | Th. tons | |
| Goods made | | .. | 17 |
| Waste paper, sold as such | | 2.5 | 9 |
| | | .. | 1 |
| Total | | | 5,350 |

(a) Amount charged.

TABLE 24 - Purchased materials and fuel

Larger establishments

See Table 13.

TABLE 25 - Employment and remuneration: Larger establishments

See Table 15.

Monthly Index of employment of operatives: Larger establishments

(average employment in 1948 = 100)

TABLE 26

| Month | Monthly Index (a) | Month | Monthly Index (a) |
|-----------|-------------------|--|-------------------|
| | Great Britain | | Great Britain |
| 1947 | | 1948 | |
| July | 112.0 | January | 95.7 |
| August | 110.1 | February | 95.0 |
| September | 108.3 | March | 95.4 |
| October | 106.1 | April | 94.9 |
| November | 98.0 | May | 93.7 |
| December | 97.0 | June | 94.6 |
| | | Percentage employment in this trade covered by the index | 79.2 |

(a) The index numbers are calculated from the number of operatives employed for one week in each month returned by larger establishments that made returns for the twelve months ended June, 1948.

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