

*HIDE & skin*

**THE FELLMONGERY TRADE.**

*Note.*—For information regarding the scope of the Census, instructions given to firms for making returns, and definitions of the terms used in this report, reference should be made to the Introductory Notes on pages v to xviii.

**Introductory.**

This trade comprises firms that were engaged wholly or mainly in fellmongery work. The following table shows the main results of the Censuses of 1930 and 1924 in respect of firms in Great Britain that employed an average of more than 10 persons :—

Particulars.	Unit.	1930.	1924.
Value of products and work done (Gross output) ...	£'000	3,186	4,718
Cost of materials used and amount paid for work given out to other firms ... ..	„	2,670	3,845
Net output ... ..	„	516	873
Average number of persons employed ... ..	No.	2,358	2,405
Net output per person employed ... ..	£	219	363
Mechanical power available :—			
Prime movers ... ..	H.P.	1,998	2,230
Electric motors driven by purchased electricity	„	1,250	979
Number of returns ... ..	No.	62	67
Number of establishments ... ..	„	63	*

\* Not available.

**Deficiencies in 1930 aggregates.**—The aggregate number of persons employed in 1930 by firms that stated that they employed not more than 10 persons on the average was 691, the corresponding figure for 1924 being 348. The value of the gross output of the small firms in 1924 was £546,000, and particulars of the classes of goods included in this figure are given below :—

Sheep and lamb skins, pulled ...	<i>Th. skins.</i> 1,056	£'000 180
Wool ... ..	<i>Th. lbs.</i> 4,128	336
Other goods made, etc. ... ..	...	30
<b>TOTAL VALUE ... ..</b>		<u>546</u>

Though the number employed in 1930 by the small firms was about 19 per cent. of the total number recorded by *all* firms, the deficiency in the gross and net output is unlikely to have been so great. In 1924 the number employed by the small firms represented about 13 per cent. of the total, but the gross output of these firms was about 10 per cent. of the total. It should be noted, however, that 19 firms to which schedules were sent at the 1930 Census and 20 at that of 1924 furnished no information; these firms either had small businesses or had ceased productive operations before the end of the censal year.

**Size of firms.**—In the following table the main particulars recorded at the Census of 1930 are grouped according to the average numbers of persons shown in the returns:—

Size of firm (average numbers employed).	No. of returns.	Gross output.	Net output.	Average number of persons employed.	Net output per person employed.
		£'000.	£'000.		£
11-24 ... ..	30	807	100	513	195
25-49 ... ..	21	1,229	161	739	218
50 and over ...	11	1,150	255	1,106	230
<b>TOTAL</b> ... ..	62	3,186	516	2,358	219

**Regional distribution.**—In the following table the results recorded at the Censuses of 1930 and 1924 are grouped according to the principal areas\* of Great Britain in which firms in this trade are situated:—

Area.	No. of returns.	Gross output.	Net output.	Average number of persons employed.	Net output per person employed.	
		£'000.	£'000.		£	
2 ... ..	1930	7	356	54	184	295
	1924	11	712	96	239	402
3 ... ..	1930	9	633	82	315	260
	1924	10	896	135	321	421
6 ... ..	1930	22	900	193	870	222
	1924	18	1,303	348	922	377
9 and 10... ..	1930	11	759	112	563	199
	1924	12	937	107	448	239
Other areas ... ..	1930	13	538	75	426	175
	1924	16	870	187	475	394
<b>TOTAL</b> ... ..	1930	62	3,186	516	2,358	219
	1924	67	4,718	873	2,405	363

\* For particulars see page xviii.

**Northern Ireland.**—No production was recorded for Northern Ireland in 1930 or in 1924.

### Production.

**Principal products.**—The following table shows the value and, where available, the quantity of skins treated, wool sold, etc., in 1930 and 1924:—

Kind of goods.	1930.			1924.	
	Quantity.	Value.	Entries.	Quantity.	Value.
Sheep and lamb skins, pulled ...	Th. skins.	£'000.	No.	Th. skins.	£'000.
	9,792	1,101	55	8,806	1,254
Wool ... ..	Th. lbs.			Th. lbs.	
	40,493*	1,946*	80	38,384	3,698
Skin rugs and mats ... ..	...	202	15	...	197
Other fellmongery products† ...	...	21‡	7	...	15
<b>TOTAL VALUE—Principal products</b> ...	...	3,270	...	...	5,164

\* Including 3,213,000 lbs., valued at £144,000, returned on 23 schedules for other trades.

† Goat skins (worked), skins of other animals, etc.

‡ Including £5,000 returned on 2 schedules for other trades.

The number of sheep and lamb skins imported with the wool left on and retained in the United Kingdom in 1930 was 5,762,636 compared with 7,161,548 in 1924. According to information furnished by the Ministry of Agriculture, the Department of Agriculture for Scotland and the Ministry of Agriculture, Northern Ireland, the quantity of skin wool obtained from sheep and lambs slaughtered in the United Kingdom in the year ended May, 1931, was approximately as shown in the following table, the particulars for the earlier period being taken from the reports on the Agricultural Output of England and Wales, of Scotland, and of Northern Ireland for 1925:—

Country.	Year ended May, 1931.		Year ended May, 1925.	
	Skin wool.	Wool per skin.	Skin wool.	Wool per skin.
	lbs.	lbs.	lbs.	lbs.
England and Wales ... ..	18,000,000	3.0	15,750,000	3.0
Scotland ... ..	7,000,000	2.5	6,000,000	2.5
Northern Ireland ... ..	450,000	2.5	370,000	2.7
<b>TOTAL</b> ... ..	25,450,000	...	22,120,000	...

The quantity of skin wool obtained from sheep and lambs slaughtered in the year ended May, 1931, was about  $3\frac{1}{4}$  million lbs. (15 per cent.) higher than in the earlier year. Particulars for the year ended May, 1930, are not available for Northern Ireland, but the total for England and Wales in that year was 20,000,000 lbs. and for Scotland 7,100,000 lbs., both figures being in excess of those recorded for the following year; the average weight per skin was the same in both years.

The total quantity of skins available from sheep and lambs slaughtered in the year ended May, 1931, may be estimated at 9 million, retained imports in 1930 were  $5\frac{1}{4}$  million and the total number of skins available for use in the United Kingdom was, therefore, about  $14\frac{1}{4}$  million. Making allowance for the exports of woolled skins which in 1930 amounted to 418,000 skins, and the output of sheep skin rugs and mats valued at £202,000 representing (on the basis of the export value of woolled sheep skins) about 1,350,000 skins, the number of woolled skins available for treatment in the United Kingdom in 1930 may be estimated at not less than 13 million, of which  $7\frac{1}{4}$  million (about 56 per cent.) were of native origin and  $5\frac{3}{4}$  million (about 44 per cent.) imported. In 1924 the number of skins available was about 15 million, exports of woolled skins amounted to 533,000 skins, the output of sheep skin rugs and mats represented about 1,250,000 skins, leaving for treatment in the United Kingdom approximately  $13\frac{1}{4}$  million skins; of this quantity home produced skins amounted to about 45 per cent. and imported about 55 per cent. The position as regards native and imported skins in 1930 was, therefore, the reverse of that in 1924.

Of the quantity available for treatment in 1930 (13 million skins),  $9\frac{1}{4}$  million were handled by firms in the Fellmongery Trade employing more than 10 persons, whereas in 1924, of the  $13\frac{1}{4}$  million skins available, about  $9\frac{1}{4}$  million were treated in this trade and  $\frac{1}{2}$  million in other trades, by firms of all sizes, of which  $8\frac{3}{4}$  million were handled by firms employing more than 10 persons. The proportion of the available total handled by the larger firms making returns on schedules for the Fellmongery Trade, therefore, was larger in 1930 than in 1924 by about 11 per cent. In 1924 some  $3\frac{1}{2}$  million skins may have been treated by leather dressers making glove and similar leathers and furnishing combined returns for their de-woolling and dressing departments, but for 1930 the number so treated will have been considerably less though the probable number cannot be stated with any degree of precision having regard to the relatively large output of the small firms in the Fellmongery Trade.

**Prices.**—The average selling values of sheep and lamb skins and of wool in 1930 and 1924, as calculated from the Census returns, are shown in the following table:—

Kind of goods.	Average value.		1930 as a percentage of 1924.
	1930.	1924.	
Sheep and lamb skins, pulled (per 1,000 skins)	£ 112·4	£ 142·2	Per cent. 79·0
Wool ... .. (per 1,000 lbs.)	48·1	96·3	50·0

**Volume of production in 1930 and 1924.**—The following table compares the volume of production of sheep and lamb skins, pulled, etc., in 1930 and 1924:—

Kind of goods.	Total production.			1930 as a percentage of 1924.
	1930.	1924.		
	As returned.	As returned.	At 1930 average values.	
Sheep and lamb skins, pulled ...	£'000. 1,101	£'000. 1,254	£'000. 991	Per cent. 111
Wool ... ..	1,946	3,698	1,849	105
Skin rugs and mats ... ..	202	197	181*	112
Other fellmongery products ...	21	15	23	91
<b>TOTAL ... ..</b>	<b>3,270</b>	<b>5,164</b>	<b>3,044</b>	<b>107</b>

\* Based on average export value per skin of sheep and lamb skins, woolled (i.e., with wool left on).

**Exports and imports.**—The following table shows the quantities and values of sheep and lamb skins exported from the United Kingdom in 1930 and 1924 together with particulars of similar skins imported and retained:—

Sheep and lamb skins, undressed.	Exports.			Retained imports.		
	No.	Weight.	Value.	No.	Weight.	Value.
	Thous.	Th. cwts.	£'000.	Thous.	Th. cwts.	£'000.
Woolled (i.e., with wool left on) ...	418	21	63	5,763	364	1,333
Other than woolled ...	533	20	88	7,162	441	2,783
	1,951	57	190	3,125	91	434
	3,976	76	428	812	47	92

**Work done for the trade or on commission, etc.**—Firms that made their returns on schedules for the Fellmongery Trade stated that they received the sum of £10,000 (including £1,000 returned on schedules for other trades), for work done in 1930 for other firms; corresponding particulars were not ascertained at the 1924 Census.

**Other products.**—In addition to the output shown in the table of principal products on page 319, firms that made their returns on schedules for the Fellmongery Trade recorded in 1930 an output of other goods, chiefly dressed leather and leather goods, valued at £45,000, as compared with £176,000 in 1924. These goods are dealt with in the reports on those trades in which the principal output was recorded.

**Waste products sold.**—Sales of waste and by-products recorded by firms in the Fellmongery Trade amounted to £11,000 in 1930 and £27,000 in 1924.

#### Employment and Wages.

**Employment.**—The following table shows the average numbers of persons employed in 1930 and 1924 :—

Persons employed.	Males.		Females.		Total.	
	Under 18.	All ages.	Under 18.	All ages.	Under 18.	All ages.
1930.						
Operatives (average for the year)	125	1,802	61	257	186	2,059
Administrative, technical and clerical staff (as at 18th October) ... ..	4	212	12	87	16	299
TOTAL ... ..	129	2,014	73	344	202	2,358
1924.						
Operatives (average for the year)	126	1,810	46	307	172	2,117
Administrative, technical and clerical staff (as at 18th October) ... ..	9	230	9	58	18	288
TOTAL ... ..	135	2,040	55	365	190	2,405

**Wages.**—The available information as to the amount of wages paid in 1930 and 1924 is given on page 314.

#### Power.

The following table shows the capacity of prime movers, electric generators and electric motors ordinarily in use and in reserve or idle in 1930 and 1924 :—

Power equipment.	1930.			1924.		
	Ordinarily in use.	In reserve or idle.	Total.	Ordinarily in use.	In reserve or idle.	Total.
	H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
PRIME MOVERS.						
Reciprocating steam engines ... ..	1,059	55	1,114	865	325	1,190
Steam turbines ... ..	—	56	56	—	—	—
Internal combustion engines :—						
Gas ... ..	454	131	585	910	46	956
Petrol, kerosene or other light oils ...	62	4	66	12	—	12
Heavy oils ... ..	72	—	72	—	—	—
Water engines ... ..	55	50	105	72	—	72
TOTAL ... ..	1,702	296	1,998	1,859	371	2,230
	Kw.	Kw.	Kw.	Kw.	Kw.	Kw.
ELECTRIC GENERATORS.						
Driven by						
Reciprocating steam engines ... ..	296	—	296	96	25	121
Steam turbines ... ..	—	35	35	—	—	—
Internal combustion engines :—						
Gas ... ..	114	25	139	338	—	338
Heavy oils ... ..	46	—	46	—	—	—
Water engines ... ..	38	35	73	28	—	28
TOTAL ... ..	494	95	589	462	25	487
	H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
ELECTRIC MOTORS.						
Driven by						
Electricity generated in same works ...	1,028	124	1,152	636	196	832
Electricity generated in other works under same ownership ... ..	225	31	256	—	—	—
Purchased electricity	1,135	115	1,250	917	62	979
TOTAL ... ..	2,388	270	2,658	1,553	258	1,811

## Consumption of fuel.

The following table shows the quantities of coal, coke and electricity recorded as used in 1930 :—

Kind of fuel used.	For power (driving engines).	For other purposes (so far as recorded).	For power and other purposes not separately distinguished.
	Tons. 5,351	Tons. 6,533*	Tons. 685
Coal ... ..	840	4,344*	110
Coke ... ..			
			B.T.U. (Kw.-hrs.) '000.
Electricity used for all purposes :—			
Generated in same works ... ..			795
Generated in other works under same ownership ... ..			170
Purchased ... ..			562
TOTAL—Electricity ... ..			1,527

\* These figures were recorded by firms representing 93.6 per cent. of the net output of the whole trade.

## TABLES.

## I.—Summary of results.

Particulars.	Unit.	England and Wales.	Scotland.	Great Britain.
Value of products and work done (Gross output) ... ..	£'000	2,428	758	3,186
Cost of materials used and amount paid for work given out to other firms ... ..	"	2,024	646	2,670
Net output ... ..	"	404	112	516
Average number of persons employed ... ..	No.	1,795	563	2,358
Net output per person employed ... ..	£	225	199	219
Mechanical power available :—				
Prime movers ... ..	H.P.	1,392	606	1,998
Electric motors driven by purchased electricity ... ..	"	907	343	1,250

## II.—Production.

Goods sold or added to stock and work done.	Unit.	England and Wales.	Scotland.	Great Britain.
Sheep and lamb skins, pulled ... ..	<i>Th. skins</i>	7,314	2,478	9,792
	£'000	909	192	1,101
Wool ... ..	<i>Th. lbs.</i>	28,410	8,870	37,280
	£'000	1,240	562	1,802
Skin rugs and mats ... ..	£'000	202	*	202
Other fellmongery products (goat skins, etc.) ... ..	"	16	—	16
By-products and waste ... ..	"	10	1	11
Other goods (dressed leather, leather goods, etc.) ... ..	"	42	3	45
Work done for the trade ... ..	"	9†	*	9†
TOTAL VALUE OF PRODUCTS AND WORK DONE (GROSS OUTPUT) ... ..	£'000	2,428	758	3,186

\* Less than £500.

† Amount received for work done.

## III.—Employment.

## A.—NUMBERS EMPLOYED IN WEEK ENDED 18TH OCTOBER, 1930.

Persons employed.	Males.		Females.		Males and females.	
	Under 18.	All ages.	Under 18.	All ages.	Under 18.	All ages.
	<i>England and Wales :—</i>					
Operatives ... ..	73	1,324	60	241	133	1,565
Administrative, etc.* ...	4	171	10	72	14	243
TOTAL ... ..	77	1,495	70	313	147	1,808
<i>Scotland :—</i>						
Operatives ... ..	50	453	—	12	50	465
Administrative, etc.* ...	—	41	2	15	2	56
TOTAL ... ..	50	494	2	27	52	521
<i>Great Britain :—</i>						
Operatives ... ..	123	1,777	60	253	183	2,030
Administrative, etc.* ...	4	212	12	87	16	299
TOTAL ... ..	127	1,989	72	340	199	2,329

\* Administrative, technical and clerical staff.

## B.—OPERATIVES EMPLOYED IN ONE WEEK IN EACH MONTH OF 1930.

Week ended	Males and females.			Week ended	Males and females.		
	England and Wales.	Scotland.	Great Britain.		England and Wales.	Scotland.	Great Britain.
Jan. 18th	1,613	554	2,167	July 19th	1,491	493	1,984
Feb. 15th	1,627	536	2,163	Aug. 16th	1,517	453	1,970
Mar. 15th	1,596	511	2,107	Sept. 13th	1,509	512	2,021
Apl. 12th	1,537	510	2,047	Oct. 18th	1,565	465	2,030
May 17th	1,500	514	2,014	Nov. 15th	1,588	520	2,108
June 21st	1,499	498	1,997	Dec. 13th	1,579	514	2,093
AVERAGE FOR THE 12 MONTHS ...					1,552	507	2,059

## IV.—Power.

## PARTICULARS OF PRIME MOVERS, ELECTRIC GENERATORS AND ELECTRIC MOTORS.

Power equipment.	England and Wales.		Scotland.		Great Britain.	
	Ordinarily in use.	In reserve or idle.	Ordinarily in use.	In reserve or idle.	Ordinarily in use.	In reserve or idle.
<b>PRIME MOVERS.</b>						
Reciprocating steam engines ... ..	H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
535	55	524	—	1,059	55	
Steam turbines ... ..	—	—	—	56	—	56
Internal combustion engines :—						
Gas ... ..	436	123	18	8	454	131
Petrol, kerosene or other light oils...	62	4	—	—	62	4
Heavy oils ... ..	72	—	—	—	72	—
Water engines ... ..	55	50	—	—	55	50
TOTAL ... ..	1,160	232	542	64	1,702	296
TOTAL OF PRIME MOVERS INSTALLED ...	1,392		606		1,998	
<b>ELECTRIC GENERATORS</b>						
Driven by	Kw.	Kw.	Kw.	Kw.	Kw.	Kw.
Reciprocating steam engines ...	116	—	180	—	296	—
Steam turbines ... ..	—	—	—	35	—	35
Internal combustion engines :—						
Gas ... ..	114	25	—	—	114	25
Heavy oils ... ..	46	—	—	—	46	—
Water engines ... ..	38	35	—	—	38	35
TOTAL ... ..	314	60	180	35	494	95
TOTAL OF ELECTRIC GENERATORS INSTALLED ...	374		215		589	
<b>ELECTRIC MOTORS.</b>						
Driven by	H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
Electricity generated in same works ... ..	490	55	538	69	1,028	124
Electricity generated in other works under same ownership	225	31	—	—	225	31
Purchased electricity ... ..	811	96	324	19	1,135	115
TOTAL ... ..	1,526	182	862	88	2,388	270
TOTAL OF ELECTRIC MOTORS INSTALLED ...	1,708		950		2,658	

V.—Consumption of fuel.

Kind of fuel used.	England and Wales.	Scotland.	Great Britain.
	Tons.	Tons.	Tons.
Coal used for power* ... ..	3,297	2,054	5,351
Coke used for power* ... ..	840	—	840
	B.T.U. (Kw.-hrs.) '000.	B.T.U. (Kw.-hrs.) '000.	B.T.U. (Kw.-hrs.) '000.
Electricity used for all purposes :—			
Generated in same works ... ..	477	318	795
Generated in other works under same ownership ... ..	170	—	170
Purchased ... ..	476	86	562
TOTAL—Electricity ... ..	1,123	404	1,527

\* In addition, 685 tons of coal and 110 tons of coke (all in Scotland) were recorded as used for power and for other purposes, not separately distinguished.

Total of ...		Total of ...		Total of ...	
H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
121	1,038	60	728	180	1,766
12	722	—	—	12	734
112	2,760	60	728	172	2,494
245	2,760	120	728	365	4,488
2,602	2,760	630	728	3,232	4,488