



BOARD OF TRADE

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Report on the Census of Production 1963

90 Leather (tanning and dressing)
and fellmongery

LONDON: HER MAJESTY'S STATIONERY OFFICE

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BOARD OF TRADE

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90 Leather (tanning and dressing) and fellmongery

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

These notes give the main information needed for interpreting the figures in the industry reports. They have been prepared by the Board of Trade in co-operation with the relevant industry associations. The figures are based on the returns made by the industry to the Board of Trade in 1963. The figures are in thousands of tons unless otherwise stated. The figures are in thousands of tons unless otherwise stated. The figures are in thousands of tons unless otherwise stated.

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Products of the leather industry are used in a wide range of applications. The industry reports are based on the returns made by the industry to the Board of Trade in 1963. The figures are in thousands of tons unless otherwise stated. The figures are in thousands of tons unless otherwise stated. The figures are in thousands of tons unless otherwise stated.

Capital expenditure on new buildings and other fixed assets is a major part of the industry's investment. The industry reports are based on the returns made by the industry to the Board of Trade in 1963. The figures are in thousands of tons unless otherwise stated. The figures are in thousands of tons unless otherwise stated. The figures are in thousands of tons unless otherwise stated.

TERMS USED IN THE CENSUS REPORT
Average number employed
The average number employed is the number of persons on the payroll (i.e. those receiving wages or salaries) on the average date during the year of return. It is the average of the number employed on the first and last days of the year. It does not include persons who were employed for less than one month. It does not include persons who were employed for less than one month. It does not include persons who were employed for less than one month.

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Notes

These notes give the main information needed for interpreting the figures in the industry reports. (More detailed information about the Census is given in a separate booklet - 'Introductory Notes': Part 1 of the Report on the Census of Production for 1963.)

GENERAL INFORMATION

Changes in the 1963 census

There were few changes resulting from amendments to the Standard Industrial Classification and only minor changes in the scope of certain industry reports compared with 1958. Any such changes are explained in the introductions to the industry reports concerned or by footnotes to the tables.

Industrial Classification

Establishments were classified to industries on the basis of major activity in conformity with the second edition of the Standard Industrial Classification (Consolidated Edition 1963, incorporating Amendment 1). Each industry was basically defined in terms of its principal products, these being of a similar nature or commonly associated in production. Normally, an establishment was classified to an industry if its sales of the principal products of that industry accounted for a greater proportion of its total sales than did its sales of the principal products of any other industry. However, where the application of this rule would have resulted in a change of classification between 1958 and 1963, the establishment was reclassified only if the sales of principal products of the newly predominant industry was more than one third greater than the sales of principal products of the previously predominant industry. This modification of the general rule was introduced for 1958 to avoid discontinuities which would result from marginal changes in sales between successive censuses.

The principle of classification by major output was also normally followed in compiling the analysis by sub-divisions of an industry.

In certain industries, classification was dealt with in a different way. Details of any non-standard treatment are given in the introductions to the relevant industry reports.

TERMS USED IN THE CENSUS REPORT

Average number employed

Firms were required to state the number of persons on the payroll (i.e. whose National Insurance cards were held by them) on the average during the year of return, whether full-time or part-time employees. Separate figures were required for (a) administrative, technical and clerical employees and (b) operatives (see below). Averages could be calculated from figures relating to the last week of each calendar month; figures shown in respect of the average number employed relate to the sum of these averages. Firms were also required to state the number of working proprietors (see below) where appropriate and these are included in total employment figures. Outworkers are excluded.

The figures include persons engaged in merchanting or factoring and canteen workers where particulars in respect of these activities could not be excluded from the return.

Working Proprietors

These include all persons regarded as 'self-employed' for National Insurance purposes, and members of their families who worked in the business without receiving a fixed wage or salary; but persons who worked less than half the normal number of working hours are excluded. For Great Britain, directors working in the business but not in receipt of a definite wage, salary or commission are included under this heading for 1963, but are excluded for 1958. For Northern Ireland, directors of limited companies, other than those paid by fee only, are included for both years. (Directors paid by fee only are not included in any of the employment figures for either year.)

Employees

(i) Administrative, technical and clerical employees include managers, superintendents and works foremen; research, experimental, development, technical and design employees (other than operatives); draughtsmen and tracers; editorial staff, staff reporters, canvassers, competition and advertising staff; travellers; and office (including works office) employees. For Great Britain, but not for Northern Ireland, they include also managing and other directors in receipt of a definite wage, salary or commission.

(ii) Operatives include all other classes of employees, that is, broadly speaking, all manual wage earners. They include those employed in and about the factory or works; operatives employed in power houses, transport work, stores, warehouses, shops and canteens; inspectors, viewers and similar workers; maintenance workers; and cleaners. Operatives engaged in outside work of erection, fitting, etc. are also included, but outworkers (i.e. persons employed by the firm who worked in their own homes, etc. on materials supplied by the firm) are excluded. Information about the numbers of outworkers employed was collected only for the gloves industry.

Capital Expenditure

(i) New building work.

This represents the cost incurred during the year of new building and other new constructional work (including office buildings, canteens and the like used in connection with the business covered by the return but not dwelling houses for employees). The value is that charged to capital account during the year of return; it includes expenditure on new buildings or on the extension or reconstruction of old buildings, the value of work of a capital nature carried out by firms' own staff, and the cost of any newly constructed buildings purchased. The figures shown include any legal charges, stamp duties, agents' commissions, etc.

90 Leather (tanning and dressing) and fellmongery

This Report on the Leather (Tanning and Dressing) and Fellmongery Industry relates to establishments engaged wholly or mainly in curing, degreasing, tanning, dyeing, etc. all types of hides and skins; making machinery belting, accessories and other manufactures of leather; removing the wool from sheepskins and lambskins and making sheepskin mats and rugs.

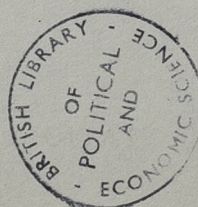
This industry corresponds to minimum list heading 431 in the Standard Industrial Classification (Consolidated edition, 1963).

METHOD OF CLASSIFICATION

The classification of returns to this industry followed the standard procedure.

In classifying returns to the sub-divisions of the industry shown in Table 2, a similar procedure was followed in first allocating each return to 'Tanning and dressing', 'Machinery belting, etc.' or 'Fellmongery'. Returns preliminarily allocated in this way to 'Tanning and dressing' were subsequently classified to 'Dressing' if the return indicated that the firm was not engaged in tanning or otherwise producing leather (whether or not for sale as such) at any establishment covered by the return.

In interpreting the data in the tables it is essential to bear in mind the notes and definitions which appear on pages (ii), (iii) and (iv).



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TABLE 1 Industry summary: United Kingdom

Estimates for all firms, 1958 and 1963 (a)

	Unit	1958	1963
Number of enterprises	No.	533	427
Number of establishments	"	581	498
Gross output	£'000	94,941	112,943
Net output	"	25,211	32,184
Net output per head	£	896	1,259
Sales and work done	£'000	93,493	107,094(b)
Purchases	"	66,512	73,584
Payments to other organisations	"	1,075	1,515
Stocks and work in progress			
Total stocks and work in progress	"	- 1,945	+ 300
Goods on hand for sale	"	- 369	- 679
Work in progress	"	- 563	- 16
Materials, stores and fuel	"	- 1,013	+ 995
Average number employed	Th.	28.1	25.6
Wages and salaries	£'000	12,042	13,284
Employers' contributions to National Insurance and private pension schemes, etc. (d)	"	..	1,196
Capital expenditure (e)			
Total	"	..	1,507
New building work	"	187	357
Land and existing buildings (f)	"	..	- 219
Plant and machinery (f)	"	783	1,125
Vehicles (f)	"	156	244

(a) For 1963, estimates for small firms and for firms not making satisfactory returns accounted for about 14 per cent. of the total figures in which they were incorporated. (For 1958 the comparable figure was 13 per cent.) A summary of the detailed returns received is given in Table 2.

(b) Including services rendered to other organisations (amounts charged for hiring out plant, machinery and other goods, for providing transport, or for technical or other services rendered).

(c) Administrative, technical and clerical employees.

(d) Including pensions and gratuities paid other than from pension funds.

(e) Excluding expenditure for establishments not yet in production.

(f) Acquisitions less disposals.

TABLE 2 Analysis of larger firms by sub-divisions within the industry, 1958 and 1963

Firms employing 25 or more persons: United Kingdom (a)

	Unit	Sub-divisions of the industry (b)		
		Tanning		
		11	1958	1963
Number of enterprises (d)	No.	49	29	
Number of establishments	"	56	32	
Gross output	£'000	19,482	16,740	
Net output	"	4,667	4,602	
Net output per head	£	854	1,237	
Sales and work done	£'000	goods produced and work done	19,297	16,562(e)
		merchanted goods and canteen takings	588	483
Sales of characteristic products	"	17,071	12,964	
Index of specialisation (g)	Per cent.	88	78	
Purchases	£'000	materials for processing and packaging, and fuel	14,023	11,392
		goods for merchenting and canteen purchases	"	473
Payments to other organisations	"	for work done on materials given out	28	125
		for transport	399	212
Stocks and work in progress	"	- 88	- 207	
Goods on hand for sale	"	change during year	2,410	1,690
		at end of year	- 316	- 97
Work in progress	"	change during year	2,044	1,309
		at end of year	- 364	+ 64
Materials, stores and fuel	"	change during year	1,649	1,404
		at end of year	5,467	3,720
Average number employed	No.	total, including working proprietors	4,564	3,144
		operatives	891	563
		other employees (h)	2,334	1,997
Wages and salaries	£'000	of operatives	785	667
		of other employees (h)	511	635
Wages and salaries per head	£	operatives	881	1,185
		other employees (h)	..	109
Employers' contributions to National Insurance (i)	£'000	..	101	
Employers' contributions to private pension schemes, etc. (j)	"	..	101	
Capital expenditure (k)	"	36	95	
New building work	"	acquisitions	..	5
		disposals	..	25
Land and existing buildings	"	acquisitions	130	145
		disposals	4	8
Plant and machinery	"	acquisitions	50	61
		disposals	15	19
Vehicles	"	acquisitions	50	61
		disposals	15	19

Sub-divisions of the industry (b)									
Tanning and dressing and Dressing only				Machinery belting and accessories and other manufactures of leather	Fellmongery		Total		
Total	Total	Tanning and dressing 12	Dressing 13		14	20	1958	1963	
1958(c)	1963			1958	1963	1958	1963	1958	1963
150	127	88	41	24	25	22	28	233	195
172	155	113	42	27	26	24	36	279	249
52,460	58,777	44,796	13,980	3,375	4,976	7,315	16,769	82,631	97,262
14,675	18,364	14,642	3,723	1,330	2,007	1,270	2,741	21,942	27,715
909	1,236	1,182	1,510	853	1,244	970	1,503	896	1,259
51,533	56,960(e)	43,997(e)	12,963(e)	3,114	4,629(e)	7,426	14,073(e)	81,370	92,224(e)
1,134	2,203	1,160	1,042	255	376	94	2,574	2,072	5,636
49,456	52,857	40,229	12,629	2,374	3,051	7,121	13,418	(f)	(f)
96	93	92	97	76	66	96	95	99	99
35,984	37,819	29,254	8,566	1,894	2,390	5,986	11,766	57,887	63,367
830	899	275	623	4	215	72	205	935	1,305
487	397	333	64	41	58	58	205	985	748
- 97	- 459	- 481	+ 23	+ 53	- 49	- 188	+ 131	- 321	- 585
3,443	3,045	2,614	431	274	234	770	1,204	6,897	6,172
- 110	+ 73	+ 120	- 47	- 47	+ 20	- 17	- 10	- 490	- 13
5,268	5,486	5,022	464	294	552	120	212	7,725	7,560
- 484	+ 540	+ 577	- 37	- 105	- 5	+ 72	+ 258	- 881	+ 857
5,287	5,995	4,817	1,178	396	364	883	1,059	8,215	8,822
16,143	14,855	12,390	2,465	1,559	1,613	1,309	1,824	24,478	22,012
13,639	12,567	10,523	2,044	1,278	1,260	1,137	1,563	20,618	18,534
2,494	2,208	1,826	382	275	328	168	240	3,828	3,339
7,031	7,817	6,525	1,292	573	683	582	1,066	10,519	11,563
2,231	2,324	1,893	431	218	317	178	283	3,413	3,592
516	622	620	632	448	542	512	682	510	624
895	1,053	1,037	1,128	794	966	1,061	1,180	891	1,076
..	434	358	76	..	42	..	58	..	643
..	235	194	42	..	26	..	36	..	399
102	105	90	15	1	68	23	39	163	307
..	38	27	11	..	- 18(1)	..	+ 16(1)	..	76
..	205	123	82	..	..	..	..	..	265
529	756	637	119	24	64	53	96	735	1,061
48	78	68	10	1	3	-	2	53	92
106	189	139	50	28	37	36	44	219	331
47	70	52	18	12	21	9	10	84	121

For notes to this table - see page 90/7

TABLE 3 Analysis of larger firms by size of enterprise within the industry, 1963

(i) Output, employment, capital expenditure and stocks

Firms employing 25 or more persons: United Kingdom

Average number employed by the enterprise in the industry (a)	Enterprises	Establishments	Average number employed (a)	Gross output	Net output	Net output per head	Capital expenditure (b)	Total value of stocks and work in progress at end of year
	Number	Number	Number	£'000	£'000	£	£'000	£'000
25-49	77	80	2,949	13,527	3,595	1,219	255	2,307
50-99	56	60	3,926	19,124	5,109	1,301	292	4,397
100-199	35	48	5,151	20,362	6,198	1,203	286	5,415
200-299	12	22	2,892	12,522	3,721	1,287	47	2,673
300-399	9	19	3,050	16,431	4,540	1,488	195	3,732
400 and over	6	20	4,044	15,295	4,553	1,126	223	4,030
Total	195	249	22,012	97,262	27,715	1,259	1,298	22,554

(ii) Employees, wages and salaries, and employers' contributions

Firms employing 25 or more persons: United Kingdom

Average number employed by the enterprise in the industry (a)	Employees		Wages and salaries		Employers' contributions		Wages and salaries per head	
	Operatives	Others (c)	Operatives	Others (c)	National Insurance (d)	Private pension schemes, etc. (e)	Operatives	Others (c)
	Number	Number	£'000	£'000	£'000	£'000	£	£
25-49	2,459	417	1,501	421	85	35	610	1,009
50-99	3,311	577	2,007	658	118	79	606	1,140
100-199	4,295	838	2,615	845	147	92	609	1,009
200-299	2,495	393	1,629	425	89	54	653	1,081
300-399	2,596	449	1,606	588	87	74	619	1,310
400 and over	3,378	665	2,206	655	116	64	653	985
Total	18,534	3,339	11,563	3,592	643	399	624	1,076

(a) Including working proprietors.

(b) Acquisitions less disposals.

(c) Administrative, technical and clerical employees.

(d) Including both flat rate and graduated contributions.

(e) Including pensions and gratuities paid other than from pension funds. These amounted in total to £124,000.

TABLE 4 Percentage analysis of employees, by age and sex, all firms, 1963: United Kingdom (a)

Ages	Males	Females	All employees
	Per cent.	Per cent.	Per cent.
Under 18	6	2	8
18 and over	72	20	92
All ages	78	22	100

Source: Ministry of Labour

(a) The percentages relate to the numbers employed (excluding working proprietors) at mid-June, 1963.

Footnotes to Table 2.

(a) The following information relates to small firms (employing fewer than 25 persons) in this industry. It includes an estimate for small firms not making satisfactory returns, which account for 1 per cent. of the employment shown for 1963, and less than 1 per cent. for 1958.

	1958	1963
Number of firms	295	236
Average number employed:		
Working proprietors	} 3,426	{ 300
Other persons employed			2,423

(b) The method of classifying returns to sub-divisions of the industry is explained in the introduction to this report; the characteristic products of each sub-division are identified in Table 5.

(c) Owing to the re-classification of a number of returns separate particulars cannot be given for sub-divisions 12 and 13.

(d) The sum of the figures for the sub-divisions exceeds the total for the industry to the extent that enterprises made returns for more than one sub-division.

(e) Including services rendered to other organisations (amounts charged for hiring out plant, machinery and other goods, for providing transport, or for technical or other services rendered).

(f) Characteristic products relate only to sub-divisions of the industry.

(g) For sub-divisions of the industry, this is the ratio of sales of characteristic products to total sales of goods produced and work done. For the industry as a whole, this is the ratio of total sales of principal products by the industry to total sales of goods produced and work done.

(h) Administrative, technical and clerical employees.

(i) Including both flat rate and graduated contributions.

(j) Including pensions and gratuities paid other than from pension funds.

(k) Excluding expenditure for establishments not yet in production.

(l) Acquisitions less disposals.

TABLE 5 Sales of principal products of the industry by larger firms, including sales by establishments classified to other industries, 1958 and 1963

Firms employing 25 or more persons: United Kingdom

Industry sub-division (a)	1958		1963			
	Quantity	Value	Quantity	Value	Enterprises	Entries
11	Tons	£'000	Tons	£'000	Number	Number
Leather undressed						
Cattle hide leather						
Sole leather						
Bends, butts, sides and backs	22,120	8,927	9,889	4,224	23	26
Shoulders, bellies and other offal (rolled or pinned)	14,718	3,146	6,001	1,264	22	25
Rough tanned leather						
Whole hides, backs, butts and bends	849	413	1,107	516	14	15
Shoulders	1,529	486	836	280	19	19
Bellies	892	209	992	225	16	16
Hide splits	975	190	1,601	249	18	19
Split hides	6,270	3,600	6,757	4,298	10	13
Buffalo hides cured	887	262	946	334	*	*
Rough tanned sheep and lamb skin leather						
Whole skins	82	84	132	110	11	13
Grain splits (i.e. crust skivers)	368	188	963	381	10	11
Flesh splits (i.e. crust chamois or lining)	733	492	665	1,154	9	9
Other sorts of undressed leather	2,919	308	2,242	511	20	21
Total undressed leather	52,842	18,306	32,131	13,546	..	..
Leather dressed	Th.sq.ft.		Th.sq.ft.			
Upper leather (other than reptile)						
Full chrome						
Calf	17,162	4,149	12,260	2,984	21	22
Sides	57,945	8,464	79,235	12,250	49	51
Splits	15,213	1,683	24,460	2,390	37	39
Other hide and calf upper leather	10,359	1,423	2,080	427	7	8
Glacé kid	18,152	2,677	5,914	921	5	5
Suede kid	4,410	738	2,970	550	7	9
Other grain kid	6,401	947	6,401	947	22	23
Other than full chrome						
E.I. kip (other than splits) and E.I. calf	28,628	2,706	22,532	2,925	28	28
Hide (other than splits)	7,257	844	..	284	*	*
Splits of all types	2,825	197	1,208	70	17	17

TABLE 5 (continued)

Industry sub-division (a)	1958		1963			
	Quantity	Value	Quantity	Value	Enterprises	Entries
12, 13	Th.sq.ft.	£'000	Th.sq.ft.	£'000	Number	Number
Leather dressed (continued)						
Upper leather (other than reptile) (continued)						
Other than full chrome (continued)						
Sheep (other than splits)	5,848	697	3,771	466	18	19
Goat (other than splits)	..	..	3,590	529	19	19
Other vegetable and semi-chrome upper leather	..	912(b)	..	131	9	10
Total upper leather (other than reptile)	167,799	23,578	176,890	26,439	..	..
Lining leather						
Kip (including splits)	34,752	2,460	28,784	2,399	31	31
Calf	8,454	605	6,523	613	23	23
Goat and kid	9,700	845	6,567	680	25	25
Sheep (including Persians)	..	118	..	125	..	..
Other lining leather (including socking)	18,405	1,233	14,218	1,046	35	35
Total lining leather	10,638	887	4,914	339	23	24
Other than upper and lining leather	..	166	..	..	..	..
Dressed hide leather						
Mechanical and textile leathers	739	137	642	236	21	25
Upholstery leather	1,942	624	2,050	774	..	..
Other dressed split hides	..	194	..	..	..	..
Dressed shoulders and bellies	28,632	3,070	30,287	3,975	5	5
Splits for insoles	4,979	836	8,437	1,330	12	13
Other dressed hide leather (including dressed splits other than splits for insoles or gloving)	4,644	501	4,550	425	18	19
Total dressed hide leather	..	141	..	248	..	..
Other dressed leather	2,382	176	1,085	90	9	10
Dressed pigskin leather (other than gloving)	2,488	210	1,576	274	17	23
Gloving leather	204	44	598	140	..	..
E.I. sheep and similar types	..	38	..	..	..	..
Cape and similar types	..	..	..	..	..	..
Total dressed leather	5,971	..	7,492	..	..	..
Other than upper and lining leather						
Dressed pigskin leather (other than gloving)	2,215	332	3,361	517	7	7
Gloving leather						
E.I. sheep and similar types	4,000	282	1,328	165	9	11
Cape and similar types	16,937	2,041	15,576	2,515	15	15

Continued on next page

TABLE 5 (continued)

Industry sub-division (a)	1958		1963			
	Quantity	Value	Quantity	Value	Enter-prises	Entries
Leather dressed (continued)	Th.sq.ft.	£'000	Th.sq.ft.	£'000	Number	Number
12,13 Other than upper and lining leather (continued)						
Other dressed leather (continued)						
Gloving leather (continued)						
Chrome and semi-chrome splits	16,336	1,270	6,854	308	13	14
Hide			2,330	179	8	8
Other sorts			6,368	669	14	16
Chamois (square cut and otherwise, other than gloving)	11,292	1,243	29,590	2,686	21	22
Other dressed sheepskin leathers		289				
Bookbinding and fancy leathers						
Full sheep	9,042	941	3,826	448	13	15
Skivers	12,979	667	9,599	566	14	15
Other sheep and lamb leathers	5,798	735	1,070	93	11	11
Hard grain goats (E.I. Morocco)	3,773	532	3,516	632	14	14
12,13 Clothing leather	14,036	1,912	33,592	4,958	31	35
12,13 Other sorts of dressed leather			5,766	1,054	30	30
Total dressed leather		47,114		54,672	..	..
Manufactures of leather not elsewhere specified (other than clothing and other finished leather goods (e.g. ladies handbags, travel goods, small cases, etc.) and parts of boots and shoes sold as such)	Th.cwt.		Th.cwt.			
14 Machinery belting of leather (including conveyor and elevator bands)	11.0	540	3.6	332	17	17
	..	30	..	286		
14 Machinery accessories of leather	Gross					
Buffalo pickers and skips	2,798	144				
Picking bands and check straps	Th.lb.		..	272	8	8
	358	145				
Combing leathers	149	120	324	391	*	*
	..	212				
Roller skins (cut)	Th.doz.		..	72	6	6
	13.0	92				
	..	79				
Gas meter diaphragms			Th.doz.		*	*
	139	244	137	312		
Other	..	172	..	536	15	16
	Th.gross		Th.gross			
14 Hat leathers (cut)	57	251	52	292	6	6
14 Other manufactures of leather	..	786	..	896	26	29
Total manufactures of leather not elsewhere specified (other than clothing and other finished leather goods (e.g. ladies' handbags, travel goods, small cases, etc.) and parts of boots and shoes sold as such)		2,815		3,389	..	..

TABLE 5 (continued)

Industry sub-division (a)	1958		1963			
	Quantity	Value	Quantity	Value	Enter-prises	Entries
20 Fellmongery	Th.skins	£'000	Th.skins	£'000	Number	Number
Pelts						
Sheep and lamb						
Of U.K. origin	4,690	1,628	9,846	3,538	25	29
Imported	1,124	141	1,156	144	11	12
Wool	Th.lb.		Th.lb.			
Of U.K. origin	17,786	3,329	28,804	7,544	27	31
From imported skins	6,723	1,745	6,791	1,979	16	17
Articles made from sheep or lamb skins						
Floor rugs and mats	..	177	..	193	6	6
Other goods	..	85	..	535	10	10
Total fellmongery		7,106		13,933	..	..
14 Hair	Th.cwt.		Th.cwt.			
	261	592	219	405	46	49
14 Hides and skins, pickled, etc.	158	1,476	150	686	26	27
			..	1,117		
Glue and gelatine stock and hide cuttings and leather and skin waste for gelatine and glue making	1,104	490	2,165	262	84	93
			..	75		
Other products	..	354	..	608	44	47
Waste products	..	393	..	122	90	94
Work done						
11 Tanning		237		387	27	29
12,13 Dressing and finishing		911		1,479	62	64
20 Fellmongery		94		108	5	5
Other work done, on commission, sub-contract work, etc.		94		221	23	23
Total		81,098		91,812	..	..
Sales in other industries (see Table 6)		572		321		
Principal products of this industry sold by establishments in the industry		80,526		91,490	195	226(c)

(a) The number given is that of the sub-division of which the item is a characteristic product. The sales shown are total sales by larger firms, not merely sales by establishments classified to the sub-division.

(b) Including suede leathers for 1958.

(c) This figure represents the total number of returns made by larger firms in this industry which is less than the total number of establishments in Table 2 on account of combined returns covering more than one establishment.

TABLE 6 Sales of principal products of the industry by establishments classified to other industries, 1958 and 1963

Firms employing 25 or more persons: United Kingdom

	1958	1963		
	Value	Value	Entries	Principal industries in which produced(a)
	£'000	£'000	Number	
Dressed gloving leather and other dressed leather including chamois other than for gloving	282(b)	109	*	91,100
Machinery belting and other manufactures of leather	290(c)	35	*	88,119
Floor rugs and mats and other manufactures from sheep or lamb skins		177	*	92,94,100
Total	572	321	..	

(a) The references given are to the list of industries at the back of this report.

(b) Including lining leather for 1958.

(c) Including sole leather (undressed) for 1958.

TABLE 7 Sales of other than principal products by larger firms in the industry, 1958 and 1963

Firms employing 25 or more persons: United Kingdom

	1958	1963
	Value	Value
	£'000	£'000
Manufactures of leather including gloves and mittens for industrial, agricultural, household and similar purposes; and parts of boots and shoes	382	233
Dressed sheep skins and other dressed skins and furs (including lamb)	462(a)	266
Other goods		151
Services rendered to other organisations (b)	..	82
Total value of goods sold without having been subjected to any manufacturing process (merchanted or factored)	1,988	5,561
Canteen takings	83	75
Total	2,915(c)	6,369

(a) Including electricity sold.

(b) Amounts charged for hiring out plant, machinery or other goods, for providing transport, or for technical or other services rendered to other organisations.

(c) Excluding amounts charged for services rendered to other organisations.

TABLE 8 Production of certain principal products of the industry by larger firms, including production by establishments classified to other industries, 1958 and 1963

This table is not applicable to this industry.

TABLE 9 Purchases of selected principal products of the industry by larger firms, 1963

This table is not applicable to this industry.

TABLE 10 Purchases by larger firms in the industry, 1954 and 1963

Firms employing 25 or more persons: United Kingdom

	1954		1963	
	Quantity	Cost	Quantity	Cost
		£'000		£'000
Materials for processing				
Raw hides and skins				
Cattle hides				
Of United Kingdom or Republic of Ireland origin	..	11,682	..	9,319
Imported, other than from the Republic of Ireland				
Wet	..	8,407	..	2,955
Dry and dry salted	..	2,986	..	814
Calf skins				
Wet	}	3,649	..	2,206
Dry and dry salted			..	24
Buffalo hides	..	494	..	299
Pig skins	..	179	..	140
Sheep and lamb skins				
Woolled				
Of United Kingdom or Republic of Ireland origin	..	5,593	..	8,626
Imported, other than from the Republic of Ireland	..	3,465	..	2,442
Pelts				
Split	}	4,516	..	595
Other			..	4,442
Of United Kingdom or Republic of Ireland origin (including pelts from imported skins fellmongered in U.K.)			..	4,442
Imported, other than from the Republic of Ireland				
Hair sheep			..	1,533
Other			..	1,475
Goat skins	..	2,458	..	1,894
Other raw hides and skins	..	905	..	798
Rough tanned hides and skins				
Chrome tanned hides				
Wet blue	}		..	678
Crust			..	296
Vegetable tanned				
E.I. tanned kips, calf and buffalo			..	3,742
E.I. kip shoulders, bellies and splits	}	9,827	..	68
Dressing hides, backs and butts			..	161
Strap butts			..	111
Hide shoulders and bellies			..	286
Hide splits			..	29
Split hides	..		3,063	

Continued on next page

TABLE 10 (continued)

	1954		1963	
	Quantity	Cost	Quantity	Cost
Materials for processing (continued)		£'000		£'000
Rough tanned hides and skins (continued)				
Sheep and lamb skins				
Whole skins	..	2,239	..	1,911
Grain splits (i.e. crust skivers)	..	246	..	64
Flesh splits (i.e. crust chamois or lining)	..	121	..	1,046
Goat skins	..	2,082	..	1,618
Other rough tanned hides and skins	..	694	..	1,141
Tanning materials				
Vegetable tanning materials				
Crude (i.e. myrobalans and other vegetable substances)	..	165	..	37
Imported extracts (wattle, quebracho and other solid or liquid extracts)	..	2,258	..	730
Extracts manufactured in the United Kingdom	..	2,491	..	825
Synthetic tanning materials	..	151	..	325
Chrome salts and liquor	..	371	..	684
Heavy chemicals (acids, alkalis, alcohols and other inorganic and organic chemicals, compressed gases, etc.)	..	1,786	..	1,911
Dyeing materials, natural or synthetic	..	988	..	1,819
Lubricating oils and greases	..	(a)	Th.gal. 68.6	26
			Th.cwt. 23.6	63
			..	10
Replacement parts for firms' own machinery, plant and vehicles, and accessories and consumable tools bought as replacement	..	942	..	807
All other materials for processing	..	2,059	..	2,157
Packaging materials	..	162	..	187
Fuel and electricity (b)	Th.tons		Th.tons	
Coal	242	952	154	863
Coke (including screenings) and manufactured fuel	13.9	72	6.6	53
	Th.gal.		Th.gal.	
Derv fuel and motor spirit for use in road vehicles	753	133	571	115
			..	16
Other liquid fuels (including creosote/pitch mixtures, etc., and liquefied petroleum gases)	1,816	84	4,880	205
	Th.therms		Th.therms	
Gas	281	17	161	15
	..	2	..	3
	Th.kWh		Th.kWh	
Electricity	67,851	433	79,078	531
			..	128
Total cost of materials and fuel		72,610		63,367
Goods purchased for merchanting		..		4,899
Canteen purchases		..		84
Total cost of purchases		..		68,351

(a) Not recorded separately in 1954.

(b) The total quantity of electricity generated in firms' own establishments in this industry was 18,881 Th.kWh in 1954 and 6,936 Th.kWh in 1963.

TABLE 11 Transport costs and employment of larger firms, 1963

Firms employing 25 or more persons: United Kingdom

	Unit	1963
Average number employed mainly on transport	No.	328
Transport costs		
Wages and salaries	£'000	237
Derv fuel and motor spirit	"	131
Payments to other organisations for transport	"	748
Costs of operating road goods vehicles		
Insurance	"	23
Vehicle licences	"	21
Depreciation	"	115
Payments to other organisations for repairs and maintenance	"	86
Total	"	1,360

TABLE 12 Payments for certain services, etc. by larger firms, 1963 (a)

Firms employing 25 or more persons: United Kingdom

	Amounts payable
Repairs and maintenance to	£'000
Buildings	269
Road goods vehicles	86
Plant, machinery, and other capital equipment	525
Insurance, licensing and depreciation of road goods vehicles (b)	159
Rates, excluding water rates	430
Hire of plant and machinery	21
Postage, telephone, telegrams and cables	207
Total	1,697

(a) No deduction is made for these payments to arrive at the figures of net output given in this report.

(b) For details see Table 11.

TABLE 13 Percentage analysis of twelve-month periods covered by returns from larger firms, 1963

Firms employing 25 or more persons:
United Kingdom

Year ended	Percentage of total number employed	Year ended	Percentage of total number employed
1963	Per cent.	1963 (contd.)	Per cent.
April (a)	3.6	November	2.6
May	4.5	December	43.0
June	5.2		
July	0.9	1964	
August	0.9	January	5.4
September	5.7	February	2.9
October	1.9	March	23.6
		Total	100

(a) Including returns made for twelve-month periods ended 1st to 5th April, 1964.

TABLE 14 Sales of all parts of machinery and plant by larger firms, including sales by establishments classified to other industries, 1958 and 1963

This table is not applicable to this industry.

Notes - continued from page ii

Capital Expenditure (continued)

(ii) Land and existing buildings.

The items shown are the capital cost of freeholds purchased and the capital cost or premium payable for leaseholds acquired (excluding the value of any assets acquired in taking over an existing business), and the amounts receivable for any freeholds or leaseholds disposed of. The value is that charged to capital account during the year of return.

(iii) Plant, machinery and vehicles.

The items shown are the value of plant and machinery and of vehicles acquired, both new and second-hand, and the amount received for items disposed of during the year. The value of plant and machinery acquired includes plant, etc. which firms produced for their own use in connection with the business covered by the return. The value of plant, etc. acquired is the expenditure charged to capital account during the year of return less any discounts received, but including the cost of transport and installation. No deduction is made for depreciation, amortisation or obsolescence. The proceeds of items disposed of during the year exclude amounts written off for items scrapped.

Capital expenditure during the year in respect of manufacturing establishments where production had not started before the end of the year is excluded in this report for both 1958 and 1963.

Characteristic Products

The characteristic products of a sub-division are those in terms of which the sub-division is defined. They are products commonly associated in production and are usually similar in nature or manner of production. In most cases the characteristic products of each sub-division are indicated in Table 5 of the industry reports. For those industries for which an analysis by sub-divisions has been made, Table 2 shows the total sales of such characteristic products for each sub-division. The totals include, besides the products which define the sub-division, other items of output assumed to be closely related to them, e.g. waste products and work done.

Enterprise

The term enterprise is used in this report to mean one or more firms under common ownership or control. An enterprise normally consists either of a single firm, or of a parent company together with its subsidiary companies.

Entries

The number of entries shown in Tables 5, 6 and 8 against a particular output or production heading is the number of returns on which figures were recorded for that item.

Establishment

The census was based on the establishment, comprising in most cases the whole of the premises under the same ownership or management at a particular address (e.g. a factory or mine); but firms were asked to exclude from all sections of their returns particulars relating to any department not engaged in production for which they kept a separate set of accounts. Where separate accounts were not kept, they were asked to include merchanting or factoring, canteens operated by them and other

ancillary activities such as bottling, packing and the manufacture of containers for packing their own products, whether or not these activities are carried on at the same address as the works. Building and engineering maintenance departments and selling and transport departments were treated similarly.

Gross Output

The gross output of an industry is the aggregate value of goods made and other work done during the year by the establishments classified to the industry. It is derived by subtracting from the value of sales and work done, the value of stocks of goods on hand for sale and work in progress at the beginning of the year and adding the value at the end of the year.

Larger Firms

These are firms in which twenty-five or more persons were employed on the average during the year.

Net Output

The net output of an industry represents the value added to materials by the process of production. It includes the gross margin on any merchanted or factored goods sold; it constitutes the fund from which wages, salaries, insurance, pensions, hire of plant and machinery, payments for repairs and maintenance, costs of operating road vehicles, rents, rates and taxes, advertising and other selling expenses and all other similar charges have to be met, as well as depreciation and profits. There is no appreciable duplication in net output. Net output has been obtained by deducting from the gross output the cost of purchases adjusted for stock changes, payments for work given out to other firms, and payments for transport.

Normally any customs or excise duty on materials purchased is included in the cost of materials. Similarly, finished goods sold have been valued as they were sold, duty paid or duty free. The amounts of duty, subsidies, allowances and levies receivable or payable, where of substantial importance in the industry, were required to be stated separately, and these items were taken into account when calculating net output.

Net output per person employed

The figures for net output per person employed are derived by dividing the net output by the average number of persons employed (full-time and part-time) on all activities covered by the returns, including operatives, administrative, technical and clerical employees and working proprietors, but excluding outworkers.

Principal Products

The principal products of an industry are those in terms of which the industry is defined. They are products commonly associated in production, and are usually similar in nature or manner of production.

Production

This means the total quantity of a product made during the year, whether sold in the year, added to stock, transferred to another department of the same firm, or used in the manufacture of other products within the business covered by the return. It includes goods produced from materials supplied by other firms.

List of Industry Reports, etc

Purchases

Purchases include the cost of materials and components bought for use in production; of fuel and electricity for all purposes; of packing materials, including the full cost of returnable cases and containers when first purchased; of workshop materials, office materials and materials for repairs to firms' own buildings, plant and vehicles when carried out by their own workpeople included in the return; of consumable tools; and of parts for machinery purchased during the year as replacements. Water charges are also included. In general purchases of goods for merchandising or factoring and canteen supplies are included. Materials supplied by customers for processing are excluded.

The values shown include any duty paid (less rebate, etc.) but exclude trade discounts allowed. The cost of transport is included only if included in the cost of materials as invoiced; amounts paid to transport organisations, including firms' own separate transport organisations, for delivery of materials and fuel are, therefore, excluded. Materials purchased overseas are included at their c.i.f. cost plus any duty payable if the cost of transport from the docks was not included in the invoiced price, but at their full delivered cost if invoiced 'carriage paid home'. Materials and fuel transferred from another department of the firm not covered by the same return are included at the estimated selling value recorded by the other department.

Sales

Sales are in respect of goods made by the business covered by the return, goods made for it by outworkers or by other firms from materials given out to them (sometimes described as goods made on commission) and waste products. Any machinery or other capital items produced for use in the business covered by the return are included, the value being that adopted in the firm's capital asset account. Goods sold without being subjected to any manufacturing process (merchanted or factored) and canteen takings are included as in 1958.

The value shown for sales is the net selling value, defined as the amount charged to customers whether on an ex-works or delivered basis, net of any trade discounts, agents' commissions, allowances for returnable cases, purchase tax, etc.; the net amount charged for packing materials is included. Goods charged on a delivered basis to customers overseas are included at the f.o.b. value. For work done on commission or for the trade the value shown is the net amount charged.

Where goods produced in one department were transferred to another department of the same firm not covered by the return, these transfers were treated as sales by the producing department and valued as far as possible as if they had been sold to an independent purchaser. Goods transferred to wholesale or retail selling organisations for which separate accounts were kept were valued on the same basis. Estimations of a similar kind were also sometimes necessary in valuing transfers between different firms belonging to the same enterprise. To the extent that the sales of finished products of one establishment may constitute the materials purchased by another, total figures of the value of sales (and of materials and fuel purchased) include an element of duplication.

Services rendered

This represents the amounts charged for hiring out plant, machinery and other goods, providing transport, or for any technical or other

services rendered to other organisations. It includes amounts credited for similar services rendered to other departments of the same firm not covered by the return.

Small Firms

These are firms in which fewer than twenty-five persons were employed on the average during the year.

Stocks and Work in Progress

Values are given of stocks of goods on hand for sale, and of materials and fuel, at the beginning and end of the year of return, including any stocks of goods held for merchandising or factoring. The values include duty in the case of dutiable goods held out of bond. The value of work in progress at the two dates is also usually shown. This excludes any progress payments made to sub-contractors, and no deduction is made on account of progress payments received.

Transport Payments

These represent the total amount paid or credited during the year for both outwards transport of finished goods sold and inwards transport of materials and fuel purchased. They include payments to other firms, and to any separate transport organisation of the same firm, not covered by the return, but exclude the value of transport services provided by the business covered by the return. The items included are payments for hired cartage and for inwards and outwards carriage by all forms of inland transport, i.e. railways, road haulage, canals, coast-wise shipping, air, etc. Payments made for sea freight on goods sold to customers overseas and on materials and fuel purchased from overseas suppliers are excluded.

Wages and Salaries

These are the amounts paid during the year to operatives and to administrative, technical and clerical employees. Payments to working proprietors, whether called salaries or not, are excluded; in Northern Ireland this exclusion extends also to payments to directors of limited companies. The values shown include all overtime payments, bonuses and commissions, whether paid regularly or not, and no deduction is made for income tax, insurances, contributory pensions, etc. The value of any payments in kind, travelling expenses, lodging allowances, etc. and employers' contributions to National Insurance and pension schemes is excluded.

Work given out

The figures shown represent the total amount paid for work done by other firms on materials supplied to them, and also by firms' own establishments for which separate returns were made. They do not include payments to individual outworkers or payments for business and other services.

Symbols used

The following symbols are used throughout the report:

- .. Not available
- Nil or negligible (less than half the final digit shown)
- * Figures cannot be shown owing to the risk of disclosing information about individual enterprises.

Rounding of Figures

The figures in the tables have, where necessary, been rounded to the nearest final digit. There may, therefore, be apparent slight discrepancies between the sums of the constituent items and the totals shown.

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