

THE FUR TRADE.

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Introductory.*

The Tables on pages 328 to 330 are based on Returns received from firms in Great Britain and Northern Ireland whose business in 1924 consisted wholly or mainly in the dressing, dyeing, cutting and making-up of furs. The number of such separate Returns was 703. About 230 firms to which schedules were sent did not furnish Returns, but these firms for the most part had very small establishments. On the basis of the information available it is estimated that they did not employ more than 750 persons in all and that their total net output was probably about £100,000.

Summary of results.—The following table shows the main results of the Censuses of 1924 and 1907, comparisons between the figures for the two years being subject to the qualifications mentioned in the next paragraph. Particulars relating to the Census of 1912 have been omitted for the reasons stated in that paragraph.

* See also the Notes on pages vii to xiv.

Particulars.	Unit.	1924.	1907.
Value of goods made and work done (Gross output)	£'000	6,565	1,658
Cost of materials used	"	4,134	1,016
Paid for work given out to other firms	"	127	55
Net output	"	2,304	587
Average number of persons employed (excluding outworkers)	No.	9,084	5,239
Net output per person employed (excluding outworkers)	£	254	112
Mechanical power available :—			
Prime movers	H.P.	192	437
Electric motors driven by purchased electricity	"	1,547	(not recorded)

Qualifications affecting comparisons.—In considering the above table and the other tables in this Report which show figures for the two censal years, it should be borne in mind that :—

(1) The comparability of figures relating to value or cost is affected by the changes which have taken place in the general purchasing power of money.

(2) The Census of 1907 covered the whole of Great Britain and Ireland, but that of 1924 applied only to Great Britain and Northern Ireland. The exclusion of Southern Ireland in 1924 does not seriously affect the comparability of the figures, since, according to the Census of Production taken by the Government of the Irish Free State in respect of the year 1926, the value of articles of clothing, wholly or mainly of fur, made in that year was returned as £17,500.

(3) The Censuses of 1907 and 1924 extended to all firms, however small, but in 1912 firms employing not more than five persons (excluding the proprietors) were merely required to state the average number of persons employed by them in the year. According to the information so furnished, the average number of persons employed in the establishments thus excluded was 1,156 or 18 per cent. of the number employed by the remaining firms. The proportion of output excluded in this way is sufficiently large to invalidate comparisons, and, consequently, the relative information obtained for 1912 is not dealt with in this Report.

Value of output and cost of materials.—The figures in the above table representing the value of goods made and work done and the cost of materials used are the aggregates of the figures recorded by the firms that made Returns, and, for the reasons explained in paragraphs (i) and (ii) on page xii, they may over-state the value of the output of, and the cost of materials used by, the Fur Trade considered as a whole. The matter is discussed on page 324, where it is estimated that in 1924 the value, free from duplication, of the output of this trade lay between £5,917,000 and £6,565,000, and the cost of the materials purchased from sources outside the trade and worked up into its products was in excess of £4,000,000 and lay between that figure and £4,134,000.

Production.

Detailed information relating to production in 1924 will be found in Table II on page 328.

Principal products.—The following table shows, for 1924 and 1907, the value of the fur goods produced, both by firms that made their Returns on schedules for the Fur Trade and also by firms whose Returns were furnished on schedules for other trades.

Kind of goods.	1924.	1907.
	Selling value.	Selling value.
	£'000	£'000
Made-up fur goods*	5,537	1,416
Mats and rugs of fur	75	164
Fur waste sold	2	4
TOTAL VALUE	5,614	1,584

* Including wearing apparel of fur or lined or trimmed with fur.

In view of the great divergence in values of furs of different varieties and the complete lack of information regarding the classes of furs covered by these aggregates, it is not possible to estimate, even roughly, the relation between the volume of output in 1924 and in 1907.

Other products.—In addition to the goods shown in the above table, an output of other goods valued at £7,000 in 1924 and £11,000 in 1907, was recorded by firms that made their Returns on schedules for the Fur Trade. These goods, being of kinds mainly produced in other trades, are dealt with in the Reports on those trades.

Alterations, repairs and work done for the trade.—The following table shows the amount received in 1924 and in 1907 for alterations, repairs and other work done for the trade. Included in the figures for 1924 is the sum of £2,000 recorded on schedules for other trades.

Kind of work done.	1924.	1907.
	Amount received.	Amount received.
	£'000	£'000
Alterations and repairs of fur goods	447	22
Work done for the trade :—		
Fur dressing	241	58
Fur dyeing	281	63
Cutting and making up of furs	177	57
Other work	4	4
TOTAL	1,150	204

It will be noted that the amount received for alterations and repairs of fur goods was, in 1907, about 1.6 per cent. of the value returned for made-up fur goods in that year, while the corresponding percentage in 1924 was five times as great.

Value of output free from duplication.—The gross output of the Fur Trade in 1924 was returned as £6,565,000. In so far, however, as the manufactures of fur included in the total were made from skins which had been dressed or dyed (or cut up, etc.), not by the manufacturing firms themselves but by other firms that made Returns on schedules for the Fur Trade, the value of such dressing, dyeing, cutting up, etc., is duplicated in the total through being included both in the amount shown as received for such work, and also in the value of the made-up goods.

In the case of cutting, making-up and similar work done for other firms (other than dressing or dyeing work), the extent of the duplication can be gauged from the fact that manufacturers of fur goods reported that they paid £127,000 to other firms for work given out to them. If the whole of this sum was paid in respect of cutting, making-up and similar work to firms that made Returns on schedules for the Fur Trade, the amount is duplicated in the gross output of the trade through being included both in the total of £181,000 recorded as received for work of those kinds, and also in the value of the output recorded by the firms that gave out the work. The difference of £54,000 between the £127,000 paid for work given out and the total of £181,000 referred to above would then represent work done for merchants and other firms outside the Fur Trade. No information is available as to the value of the furs on which this work was done.

In the case of the dressing and dyeing of furs by firms that did not make them up, that work may have been done either by firms working on commission, to which the owners of the furs gave them out for treatment, or by firms that owned the furs and sold them in the dressed or dyed state for making-up. In neither case do the Census Returns involve duplication in respect of the undressed furs dealt with. In the first case the value of the furs was not recorded by the commission firms as part of their output: in the second case, the firms concerned were instructed to return only the value of the work of dressing or dyeing carried out by them, as if it had been done on commission. The value of the undressed furs used by them was thus recorded only once, namely, in the output of the making-up firms that bought those furs in the dressed and dyed condition. In regard to dressing and dyeing work, however, it will be clear that, in all cases where such work was carried out by firms in the United Kingdom other than the making-up firms themselves, the value of that work was duplicated through entering into the output both of the firm that did the work and of the firm that recorded the furs in their dressed and dyed state. In cases in which the furs were purchased in the dressed or dyed state, their value being included in the cost of materials returned, in one sum, by the making-up firms, there are no data from which the extent of the duplication involved can be estimated. Making-up firms that gave furs out to be dressed or dyed were instructed to include, in their

statements of cost of materials used, the cost of such furs, inclusive of the cost of dressing or dyeing, and to exclude from their statements of sums paid to other firms, any payments made for the work of dressing and dyeing. In this case, also, therefore, the amount of the duplication involved cannot be estimated.

It is obvious, however, that the amount duplicated in the gross output of the trade in respect of fur dressing and dyeing cannot exceed the total amount of £522,000 included in that output as received for such work. If this total includes any sums received for fur dressing and dyeing from merchants or other firms outside the fur trade, the actual amount of duplication would be diminished by the aggregate of those sums. No information is available, however, as to the payments made for fur dressing and dyeing, either by merchants or other firms outside the Fur Trade, or (for the reason explained above) by firms within that trade.

From the foregoing analysis it will be clear that the maximum possible duplication involved in the gross output value of the trade is £127,000 in respect of cutting, making-up and similar work, and £522,000 in respect of dressing and dyeing work. Hence, the total value of the output of the Fur Trade, free from duplication, may be estimated as lying between £5,916,000 and £6,565,000.

Estimated on a similar basis the value of the output of the Fur Trade in 1907 lay between £1,482,000 and £1,658,000.

Cost of materials and work given out.—The cost of materials used by firms that made their Returns on schedules for the Fur Trade was returned as £4,134,000 in 1924. From what has been stated in the preceding section, it will be seen that, in cases in which furs were dressed in the United Kingdom by firms that did not make them up, the cost of the furs themselves was omitted from the Returns of the dyeing or dressing firms even when they were owners of the furs, and duplication of that cost was thus avoided in aggregating the particulars as to the cost of materials used, furnished by firms making-up fur goods and by other firms treating those goods prior to making up. The dyes and other materials used are, however, clearly duplicated in the totals recorded in respect of the cost of the treated furs. All but a small part of the £522,000 received for dressing and dyeing furs was received by firms that did no other work, and though the value of the duplicated materials cannot be ascertained exactly, it appears improbable that it can have exceeded 25 per cent. of the total sum received for the work. On that basis the net cost of materials purchased from outside the Fur Trade may be estimated at a value exceeding £4,000,000, and lying between that figure and £4,134,000. The corresponding figure for 1907 cannot be estimated.

The amount paid to other firms for work given out to them, other than fur dressing and dyeing, was returned as £127,000 in 1924 and £55,000 in 1907.

Net output.—The net output in 1924 of the firms that made their Returns on schedules for the Fur Trade (whose gross output was valued at £6,565,000) was £2,304,000, that sum representing, without duplication, the total amount by which the value, as delivered, of the aggregate output exceeded the cost, as purchased, of the materials used and the amount paid to other firms for work given out to them.

The net output per head of persons employed (excluding outworkers) in the censal year 1924 was £254 as compared with £112 in 1907.

Exports and imports.—The value of the exports of *clothing of fur or skins (including muffs and similar articles)* in 1924 amounted to £350,000 f.o.b. and net imports were valued at £565,000 c.i.f. The total production of made-up fur goods in that year was valued at £5,537,000 at place of production. Ignoring the different bases of valuation, it will thus be seen that the value of exports formed slightly over 6 per cent. and that of net imports slightly over 10 per cent. of the total value of made-up fur goods produced in the year. Similar percentages cannot be given for 1907 owing to a change in the classification of exports and imports.

Wages in 1924.

Under the Census of Production Act, 1906, the powers of the Board of Trade to require information do not extend to particulars of the amount of wages paid, and, consequently, no information on this head was secured in connexion with the Census of 1924. As a result, however, of the voluntary enquiry undertaken by the Ministry of Labour into wages and hours in the United Kingdom in 1924, information was obtained as to the total wage-bill of a group of firms in the Fur Trade which made Returns both to the Ministry of Labour and to the Census of Production office. According to the Census records this group of firms employed, in the week ended 18th October, 1924, 3,854 operatives, or 48 per cent. of the total of 7,949 operatives for the trade as a whole, and their net output totalled £1,295,000, or 56 per cent. of the aggregate net output of £2,304,000 for the trade as a whole. The total wage-bill of these firms, as returned to the Ministry of Labour, was £514,000, representing about 40 per cent. of their aggregate net output.

Employment.

The detailed information relating to employment in 1924 is summarised in Table III on pages 329 to 330. The following table sets out certain particulars for that year together with those obtained at the 1907 Census. For the purpose of this comparison, the average numbers of operatives of each sex returned for 1924 have been divided between the two age-groups in the proportions shown by the data relating to the week ended 18th October.

Average number excluding outworkers).	Males.		Females.		Males and females.	
	Under 18.	All ages.	Under 18.	All ages.	Under 18.	All ages.
1924.						
Operatives	691	3,383	869	3,938	1,560	7,321
Administrative, etc. ..	62	1,213	72	550	134	1,763
TOTAL	753	4,596	941	4,488	1,694	9,084
1907.						
Wage earners	227	2,216	342	2,197	569	4,413
Salaried	33	609	32	217	65	826
TOTAL	260	2,825	374	2,414	634	5,239
Average number of outworkers:—						
1924	262		98		360	
1907	148		171		319	

The numbers of operatives recorded month by month in 1924 ranged from 628 above the average, in October, to 671 below the average, in January, the total number increasing month by month until October, after which a decrease was recorded (see Table IIIB, page 329).

Mechanical Power.

The detailed information relating to mechanical power in 1924 is summarised in Table IV on page 330. The following table sets out the particulars for 1924 and 1907 relating to the capacity and kinds of *prime movers* installed.

Power equipment.	1924.			1907.
	Ordinarily in use.	In reserve or idle.	Total.	Total.
PRIME MOVERS:—				
Reciprocating steam engines ..	H.P. 77	H.P. 75	H.P. 152	H.P. 252
Gas engines	40	—	40	} 185
Petrol and light oil engines ..	—	—	—	
Heavy oil engines	—	—	—	
TOTAL	117	75	192	437

No *electric generators* were recorded for either year.

The total capacity of *electric motors* recorded in 1924 was 1,547 horse-power, of which motors of a capacity of 1,408 horse-power were ordinarily in use. All these motors were driven by purchased electricity.

Corresponding information was not required for 1907. The total number of Board of Trade units of electricity purchased for power and lighting purposes in that year was returned as 29,000.

TABLES.
I.—Summary of results.

Particulars.	Unit.	England and Wales and Northern Ireland.*	Scotland.	United Kingdom.
Value of goods made and work done (Gross output)	£'000	6,360	205	6,565
Cost of materials used	"	4,042	92	4,134
Paid for work given out to other firms	"	126	1	127
Net output	"	2,192	112	2,304
Average number of persons employed (excluding outworkers)	No.	8,600	484	9,084
Net output per person employed (excluding outworkers)	£	255	230	254
Mechanical power available:—				
Prime movers	H.P.	192	—	192
Electric motors driven by purchased electricity	"	1,522	25	1,547

* In order to avoid the disclosure of information relating to the one firm in Northern Ireland, the figures for that division of the United Kingdom have been combined with those for England and Wales.

II.—Production.

Output sold or added to stock and work done.	England and Wales and Northern Ireland.*	Scotland.	United Kingdom.
	Selling value.	Selling value.	Selling value.
	£'000	£'000	£'000
Made-up fur goods (including wearing apparel of fur or lined or trimmed with fur)	5,218*	115	5,333
Mats and rugs of fur	74	1	75
Other products	7	—	7
Waste sold	2	—	2
TOTAL VALUE OF GOODS MADE	5,301	116	5,417
	Amount received.	Amount received.	Amount received.
Alterations and repairs of fur goods	366*	80	446
Fur dressing and dyeing and other work done for the trade:—			
Fur dressing	240	1	241
Fur dyeing	280	†	280
Cutting and making-up of furs	169	8	177
Other work	4	†	4
TOTAL VALUE OF WORK DONE	1,059	89	1,148
TOTAL VALUE OF GOODS MADE AND WORK DONE (GROSS OUTPUT) ..	6,360	205	6,565

* See footnote to Table I: the items affected by the inclusion of the figures for Northern Ireland are also marked (*).

† Less than £500.

III.—Employment.

A.—NUMBERS EMPLOYED IN WEEK ENDED 18TH OCTOBER, 1924
(EXCLUDING OUTWORKERS).

Kind of staff.	Males.		Females.		Males and females.	
	Under 18.	All ages.	Under 18.	All ages.	Under 18.	All ages.
<i>England and Wales and Northern Ireland:—</i> †						
Operatives	727	3,551	886	3,998	1,613	7,549
Administrative, etc.*	59	1,158	59	480	118	1,638
TOTAL	786	4,709	945	4,478	1,731	9,187
<i>Scotland:—</i>						
Operatives	15	81	66	319	81	400
Administrative, etc.*	3	55	13	70	16	125
TOTAL	18	136	79	389	97	525
<i>United Kingdom:—</i>						
Operatives	742	3,632	952	4,317	1,694	7,949
Administrative, etc.*	62	1,213	72	550	134	1,763
TOTAL	804	4,845	1,024	4,867	1,828	9,702

* Administrative, technical and clerical staff.

† See footnote to Table I.

B.—OPERATIVES EMPLOYED IN ONE WEEK IN EACH MONTH OF 1924
(EXCLUDING OUTWORKERS).

England and Wales and Northern Ireland. (Annual average: Males, 3,307; Females, 3,655; Total, 6,962.)*

Week ended.	Males.	Females.	Total.	Week ended.	Males.	Females.	Total.
Jan. 12th ..	2,992	3,307	6,299	July 19th ..	3,310	3,625	6,935
Feb. 16th ..	3,167	3,410	6,577	Aug. 16th ..	3,318	3,626	6,944
March 15th ..	3,246	3,510	6,756	Sept. 13th ..	3,425	3,855	7,280
April 12th ..	3,214	3,554	6,768	Oct. 18th ..	3,551	3,998	7,549
May 17th ..	3,261	3,619	6,880	Nov. 15th ..	3,540	3,991	7,531
June 21st ..	3,279	3,649	6,928	Dec. 13th ..	3,381	3,711	7,092

Scotland. (Annual average: Males, 76; Females, 283; Total, 359.)

Week ended.	Males.	Females.	Total.	Week ended.	Males.	Females.	Total.
Jan. 12th ..	73	278	351	July 19th ..	74	268	342
Feb. 16th ..	76	279	355	Aug. 16th ..	76	283	359
March 15th ..	75	261	336	Sept. 13th ..	81	310	391
April 12th ..	73	259	332	Oct. 18th ..	81	319	400
May 17th ..	73	258	331	Nov. 15th ..	81	320	401
June 21st ..	71	256	327	Dec. 13th ..	81	304	385

United Kingdom. (Annual average: Males, 3,383; Females, 3,938; Total, 7,321.)

Week ended.	Males.	Females.	Total.	Week ended.	Males.	Females.	Total.
Jan. 12th ..	3,065	3,585	6,650	July 19th ..	3,384	3,893	7,277
Feb. 16th ..	3,243	3,689	6,932	Aug. 16th ..	3,394	3,909	7,303
March 15th ..	3,321	3,771	7,092	Sept. 13th ..	3,506	4,165	7,671
April 12th ..	3,287	3,813	7,100	Oct. 18th ..	3,632	4,317	7,949
May 17th ..	3,334	3,877	7,211	Nov. 15th ..	3,621	4,311	7,932
June 21st ..	3,350	3,905	7,255	Dec. 13th ..	3,462	4,015	7,477

* See footnote to Table I.

C.—NUMBER OF OUTWORKERS AT TWO SPECIFIED PERIODS IN 1924.

Country.	January.			July.		
	Males.	Females.	Total.	Males.	Females.	Total.
<i>England and Wales*</i>	261	114	375	263	82	345

* No outworkers were returned for Scotland or Northern Ireland.

IV.—Mechanical 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.
PRIME MOVERS :—	H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
Reciprocating steam engines	77	75	—	—	77	75
Gas engines	40	—	—	—	40	—
TOTAL	117	75	—	—	117	75
ELECTRIC MOTORS :—	H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
Driven by purchased electricity	1,384	138	24	1	1,408	139

* No mechanical power was returned for Northern Ireland.