

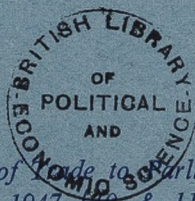
BOARD OF TRADE

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*The Report on the  
Census of Production  
for 1954*

Volume 7: Industry F

LEATHER GOODS



*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)*

LONDON: HER MAJESTY'S STATIONERY OFFICE

1957

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# The Report on the Census of Production for 1954

VOLUME 7 INDUSTRY F

## LEATHER GOODS

THIS REPORT on the Leather Goods Industry relates to establishments engaged wholly or mainly in the manufacture of trunks, suitcases, handbags, pocket books, belts, straps, harness, saddlery and other goods (except clothing) of leather and leather substitutes.

This industry corresponds to minimum list heading 131 in the Standard Industrial Classification.

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IMPORTANT NOTES and definitions appear on the next page. In interpreting the data in the tables, it is essential to bear these in mind.

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The following notes describe terms in general use in the tables of the report. More detailed explanations of the terms used and a description of the scope and method of taking the census are given in the separate booklet entitled 'The Report on the Census of Production for 1954 - Introductory Notes' (price 1s. 6d. net).

**Industrial Classification:** Establishments are classified to industries according to the nature of their output and, as far as possible, in conformity with the Standard Industrial Classification. Certain products are identified as the principal products of individual industries, the principal products for a given industry being of a similar nature or commonly associated in production. The principle of classification normally followed is that an establishment is classified to an industry if its output of the principal products of that industry accounted for a greater proportion of the value of its output than did its output of the principal products of any other industry.

**Specialist producers** normally comprise those establishments 50 per cent. or more of whose total output by value is accounted for by the characteristic products of the specialist group.

**Intermediate products:** For some industries figures are given showing the total quantities made during the year of intermediate products, i.e., products which may be further processed in the establishments in which they are produced.

**Larger establishments:** The information given in the report relates mainly to 'larger establishments', i.e., establishments of firms employing on the average more than 10 persons. In most cases an establishment comprises the whole of the premises under the same ownership or management at a particular address (e.g., a mine or factory). Offices, warehouses, laboratories and other ancillary places of business situated apart from the producing works are not regarded as separate establishments and are included in the return for the works.

**Small firms** are those employing on the average 10 or fewer persons.

The estimates for the industry as a whole given in Table 1 are normally obtained by increasing the other items shown in the same proportion as total employment.

**Gross output (production)** is the total value of goods made and other work done during the year: it is obtained by adjusting the value of sales and work done during the year for changes in the value of stocks of products on hand for sale and work in progress.

**Net output** is the amount left after deducting from the value of gross output the aggregate of the cost of materials and fuel used, the amount paid for work given out, and, for 1951 and 1954, any transport payments made. This represents the value added to materials by the process of production, and constitutes the fund from which wages, salaries, rents, rates and taxes, advertising and other selling expenses and all other similar charges have to be met, as well as depreciation and profits.

**Sales** means sales during the year of goods made in the establishment covered by the return or made on commission for it, whether produced in the year or not. The value of sales is the net selling value, i.e., the amount charged to customers, whether on an ex-works or delivered basis, and net of any trade discounts, agents' commissions, allowances for returnable cases, purchase tax, etc. For goods charged on a delivered basis to customers overseas, firms were required to give the f.o.b. value.

**Materials and fuel:** The total cost of materials and fuel purchased includes all purchases during the year of materials for use in production, and of fuel (includ-

ing oil, gas and electricity) for all purposes: packing materials, including the full cost of returnable cases when first purchased; workshop and office materials; water charges; materials for repairs to buildings, plant and vehicles when carried out by firms' own work-people included in their returns; consumable tools; and parts for machinery purchased as replacements. Purchases of goods for merchandising are excluded. The cost of materials and fuel used, given in Table 2, is obtained by adjusting purchases for changes during the year in the value of stocks.

**Stocks:** Firms were required to give stocks of materials and fuel, products on hand for sale, and work in progress, at income tax values.

**Customs and Excise Duty** paid on materials purchased is normally included in the cost of materials. Finished goods are similarly valued as they were sold, duty-paid or duty-free. The net amount of any duty paid is deducted in arriving at net output.

**Employment:** Total employment includes working proprietors, administrative, technical and clerical employees, and operatives, but excludes outworkers, canteen employees and persons engaged in merchandising or any other activity not covered by a firm's return, who are shown separately as excluded employees. Employees are persons on the pay-roll (i.e., persons whose National Insurance cards were held by employers), whether employed full-time or part-time.

**Working proprietors** are proprietors of businesses other than limited companies, together with members of their families who worked in the business without receiving fixed wages or salaries. Any persons working less than half the normal hours are excluded. For Northern Ireland directors of limited companies (other than those paid by fee only) are also included.

**Administrative, technical and clerical employees** include directors, other than those paid by fee only (except in Northern Ireland); managers, superintendents and works foremen; research, experimental, development, technical and design employees (other than operatives); draughtsmen and tracers; travellers; and office (including works office) employees.

**Operatives** include all other classes of employees, i.e., broadly speaking, all manual workers.

**Outworkers** are persons employed by the firm who work on materials supplied by the firm in their own homes.

**Wages and salaries** include all overtime payments, bonuses and commissions without any deductions for income tax, insurances, contributory pensions etc. They exclude payments to working proprietors.

**Capital expenditure** includes expenditure on new building work, and on plant, machinery and vehicles, charged to capital account during the year, including any transport and installation costs involved. It includes expenditure in respect of establishments in Great Britain which had not begun production before the end of the year (which has not previously been included in the Census of Production reports for individual industries).

**Symbols used:**

.. for not available

- for nil or negligible (less than half the final digit shown).

Where figures are rounded, e.g., given to the nearest £ thousand, there may be apparent slight discrepancies between the sums of constituent items and the totals shown. In some cases, figures have been combined with others of a similar nature where publication of separate details might disclose information relating to an individual undertaking.

Industry summary: Estimates for the industry as a whole

TABLE 1

	United Kingdom			Scotland 1954	Wales 1954
	1948	1951	1954		
	£ million	£ million	£ million	£ million	£ million
Gross output (production)	15.9	20.5	23.0	0.82	0.51
Net output	7.8	8.6	10.6	0.34	0.28
Total stocks and work in progress					
At beginning of year	3.7	3.8	3.5	0.09	0.03
Change during year	- 0.1	+ 0.6	+ 0.4	-	-
Capital expenditure less disposals (a)	0.2	0.2	0.4	0.02	0.01
Wages and salaries	4.5	5.4	6.5	0.22	0.20
Total employment (including working proprietors)	Thousands 19.3	Thousands 20.7	Thousands 21.5	Thousands 0.87	Thousands 0.72

(a) Capital expenditure on new building work, plant, machinery and vehicles (including (except in 1948) that incurred in Great Britain for establishments not yet in production), less amounts received for plant, machinery and vehicles disposed of.

Summary of returns received

TABLE 2

	Unit	Great Britain 1948	United Kingdom	
			1951	1954
<b>FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS</b>				
Number of establishments	No.	330	349	328
Total value of sales and work done	£'000	12,446	16,934	18,988
Products on hand for sale	"	808	949	967
and work in progress	"	+ 61	+ 188	+ 174
Gross output (production) (a)	"	12,449	17,122	19,163
Purchases of materials and fuel	"	6,108	10,016	10,133
Stocks of materials and fuel	"	2,129	2,233	1,940
at beginning of year	"	- 141	+ 307	+ 136
change during year	"	6,248	9,708	9,997
Cost of materials and fuel used	"	64	41	119
Payment for work done on materials given out	"	58	185	251
Payment for transport (b)	"	6,137	7,187	8,796
Net output	"	13,076	15,097	15,564
Average number of employees	{ operatives others	"	"	"
operatives	"	1,970(c)	2,147	2,228
others	"	15,138	17,346	17,881
Total employment (d)	"	405	414	492
Net output per person employed (d)	£	2,625	3,398	4,171
Wages and salaries	{ of operatives of others	"	"	"
of operatives	"	932	1,079	1,236
of others	"	15	25	108
Capital expenditure	"	91	83	140
New building work (e)	"	10	4	15
Plant and machinery	{ acquisitions (e) disposals	"	"	"
acquisitions (e)	"	54	109	136
disposals	"	21	40	51
Vehicles	"			
<b>FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS</b>				
Number of returns	No.	922	789(f)	754
Total employment, including working proprietors	"	3,521	3,077(f)	2,863

(a) For the year 1948 gross output excludes payments for transport services outwards on finished goods sold. For subsequent years gross output includes payments to other firms and undertakings and to firms' own separate transport organisations for transport services.

(b) Payments to other firms and undertakings and to firms' own separate transport organisations. For the year 1948 payments cover only transport outwards of finished goods sold. For subsequent years they cover payments for transport of both finished goods sold and materials and fuel purchased.

(c) Number in week ended September 25, 1948.

(d) Excluding outworkers and including working proprietors.

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

(f) Excluding Northern Ireland. No information about small firms was collected in Northern Ireland for 1951.

## Analysis by size, 1954

## Larger establishments in the United Kingdom

TABLE 3

Average number employed (a)	Estab-lish-ments	Gross output	Net output	Employees		Wages and salaries		Capital expenditure (b)	Net output per person employed (a)
				Operatives	Others	Operatives	Others		
	Number	£'000	£'000	Number	Number	£'000	£'000	£'000	£
11 - 24 (c)	102	1,904	935	1,465	223	416	111	41	540
25 - 49	106	3,903	1,802	3,166	454	829	250	73	493
50 - 99	83	5,898	2,643	5,312	746	1,364	413	134	435
100 - 199	28	4,083	1,823	3,265	507	886	263	79	483
200 - 499	9	3,376	1,593	2,356	298	677	198	57	600
Total	328	19,163	8,796	15,564	2,228	4,171	1,236	383	492

(a) Excluding outworkers and including working proprietors.

(b) Capital expenditure on new building work and on acquisition of plant, machinery and vehicles.

Excluding expenditure for establishments not yet in production.

(c) Including a small number of establishments with fewer than 11 persons employed, particulars of which were included with those for larger establishments on a single return.

TABLE 4 - Analysis according to specialisation within the industry, 1954

## Larger establishments in the United Kingdom

No specialisation within this industry was distinguished.

## Sales of the principal products of the industry, including sales of these products by establishments classified to other industries

## Larger establishments in the United Kingdom

TABLE 5

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
	Gross	£'000	Gross	£'000	Number
Travel goods (a)					
Trunks of all kinds (b)	283	204	307	124	14
Carrying cases of all kinds, including school satchels (b)	31,763	4,009	36,622	4,682	128
Carrying bags of all kinds, other than sports bags (b)					
Wholly or mainly of plastics materials	31,428	2,313	11,508	712	54
			..	208	
Of leather or other materials			13,692	1,067	67
			..	841	
Total travel goods		6,525		7,634	..
Ladies' hand-bags, pochettes and sling bags (a)					
Wholly or mainly of plastics materials	50,736	4,781	34,413	2,329	72
			..	740	
Of leather or other materials			8,913	1,828	75
Wallets, note-cases, purses, pocket books and the like					
Wholly or mainly of leather	32,912	1,166	37,300	1,474	96
			..	152	
Of other materials	46,416	440	8,958	106	30
			..	45	
Small cases of all kinds (e.g., beauty and manicure cases and the like) (a)	3,525	279	21,104	742	77
			..	265	
Other fancy goods of leather or other materials, excluding those made wholly or mainly of plastics materials	..	976	..	993	53

(83287)

TABLE 5 (contd.)

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
	Gross	£'000	Gross	£'000	Number
Saddlery and harness	..	297	..	279	25
Leather braces, dog collars, harness, leads and whips	..	405	..	390	35
Leather straps and belts of all kinds	163,259	1,666	112,691	1,026	86
			..	394	
Motor and cycle accessories (e.g., cycle bags and radiator muffs)	31,412	660	15,973	385	22
			..	393	
Other leather goods (except apparel, machinery belting and sports goods)	..	376	..	794	..
Scrap and waste products	..	18	..	15	60
Repair work (c)		38		31	65
Work done for the trade or on commission (c)		120		160	19
Total		17,745		20,177	..
Sales in other industries (see Table 6)		1,610		2,157	..
Principal products of this industry sold by establishments in the industry		16,135		18,020	305

(a) The value of toilet articles and similar fittings purchased for dressing cases, hand-bags, etc., is included.

(b) Excluding goods of metal, wood, plastic or matting made by establishments in other industries.

(c) Amount charged.

## Sales of principal products of the industry by establishments classified to other industries: Larger establishments in the United Kingdom

TABLE 6

	1954			Principal industries in which produced (a)
	Quantity	Value	Entries	
	Gross	£'000	Number	
Travel goods				
Carrying cases of all kinds, including school satchels	261	25	10	5E, 6N, 11C, 11E
	..	98		
Carrying bags of all kinds, other than sports bags	..	680	10	2I, 5E, 5G, 11I
Total travel goods		803	..	
Ladies' hand-bags, pochettes and sling bags	3,042	209	8	6N, 11I
Wallets, note-cases, purses, pocket books and the like	..	78	5	6N, 7H, 10K
Small cases of all kinds	842	21	6	7D, 11E
	..	19		
Other fancy goods of leather or other materials, excluding those made wholly or mainly of plastics materials	..	67	..	10D, 10I, 10K
Saddlery and harness, leather braces, dog collars, leads and whips	..	101	5	6N, 7H, 11E
Leather straps and belts of all kinds	..	48	9	6N, 7D, 7H
Motor and cycle accessories (e.g., cycle bags and radiator muffs)	6,102	113	7	3I, 7H, 10C
	..	318		
Other leather goods (except apparel, machinery belting and sports goods)	..	285	32	7D, 7E
Work done for the trade or on commission (b)		95	..	
Total		2,157	..	

(a) The volume number and industry references given are to the industries shown in the list at the back of this report.

(b) Amount charged.

(83287)

Sales in the industry of other than principal products  
Larger establishments in the United Kingdom

TABLE 7

	1954	
	Quantity	Value £'000
Sports requisites	..	48
Plastic goods and fancy articles	..	178
Gloves, wholly or partly of leather for industrial, agricultural, household and similar purposes	..	131
Other leather goods, including clothing, footwear and parts thereof	..	165
Other goods	..	287
Work done (a)	..	161
Total		969

(a) Amount charged.

TABLE 8 - Total make of intermediate products

Larger establishments in the United Kingdom

This table is not applicable to the industry.

Purchases of materials and fuel, 1954

Larger establishments in the United Kingdom

TABLE 9

	Quantity	Cost
	Th.sq.ft.	£'000
Materials		
Dressed leather		
Case, seat, cloak and bag hides	4,024	602
Other dressed hide leather	4,227	601
Dressed pig-skin leather	1,885	295
Hard grain goats (morocco)	2,292	325
Reptile	90	31
Other sorts of dressed leather	5,975	533
	..	98
	Th.cwt.	
Vulcanised fibre board	13	76
	..	63
Paper and paperboard other than for use as packing materials	103	330
	..	98
Plastic sheets including plastic film, rods and tubes	12	195
	..	350
Finished plastic components and fittings	..	141
	Th.sq.yds.	
Leathercloth	2,671	674
	..	75
Woven piece goods (including canvas)		
Of cotton or mainly of cotton	1,155	230
Of rayon, nylon, etc. or mainly of rayon, nylon, etc.	2,502	410
Of other materials	472	77
	..	195

(83287)

TABLE 9 (contd.)

	Quantity	Cost
	Th.doz.	£'000
Materials (contd.)		
Metal components		
Frames for handbags, purses, etc.	498	452
Slide fasteners	854	292
Locks, other than padlocks	584	172
Other metal components	..	53
Packing materials	..	694
All other purchased materials	..	231
Unclassified materials	..	971
Fuel and electricity		
Coal	3	14
Coke	4	21
Liquid fuel (including creosote/pitch mixtures)		
For use in internal combustion engines	Th.gal.	
Motor spirit (petrol) for use in road vehicles and derv. fuel	133	29
Other	3	5
For burning in furnaces, boilers, kilns, etc.	69	3
Gas purchased	Th.therms	
From Gas Boards	313	22
From other sources, including other departments of the same firms	..	5
Electricity purchased	Th.kWh.	
From Electricity Boards	4,925	42
From other sources, including other departments of the same firms	..	14
All other purchased fuel	39	-
Unclassified fuel		4
Total cost		6
		10,133

Average number of employees and wages, salaries and superannuation payments (a)

Larger establishments in the United Kingdom

TABLE 10

	1951	1954
	Number	Number
Average number of employees		
Operatives	15,097	15,564
Administrative, technical and clerical employees	2,147	2,228
Total	17,244	17,792
Wages and salaries paid to	£'000	£'000
Operatives	3,398	4,171
Administrative, technical and clerical employees	1,079	1,236
Total	4,477	5,407

(83287)

TABLE 10 (contd.)

	1951	1954
Wages and salaries per head	£	£
Operatives	225	268
Administrative, technical and clerical employees	503	555
		£'000
Superannuation and other pension funds for employees and dependents (b)		
Employers' contributions	..	32
		Number
Employees covered	..	1,899
		£'000
Pension, etc. payments to former employees and dependents (b)	..	9

(a) The following persons, not included above, were also employed by larger establishments in this industry ('other workers' includes, for example, employees engaged in merchanting). Payments to outworkers are also shown.

	1951	1954
	Number	Number
Canteen workers		
Males	1	2
Females	100	121
Total	101	123
Other workers		
Males	46	40
Females	19	31
Total	65	71
Outworkers		
Males	67	131
Females	1,705	1,944
Total	1,772	2,075
	£'000	£'000
Payments to outworkers	184	251

(b) The figures given relate to larger establishments in Great Britain only.

Employment in a specified week (a)  
Larger establishments in, the United Kingdom

	1951			1954		
	Males	Females	Total	Males	Females	Total
Working proprietors	88	14	102	70	19	89
Operatives	4,609	10,457	15,066	4,865	11,073	15,938
Administrative, technical and clerical employees	1,159	1,008	2,167	1,169	1,072	2,241
Total employees	5,768	11,465	17,233	6,034	12,145	18,179

(a) Week ended September 22, 1951, or October 30, 1954.

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