

THE SADDLERY, HARNESS AND LEATHER GOODS 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 the manufacture of saddlery, harness, travelling bags, trunks, and other leather goods. 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 goods made and work done (Gross output)	£'000	5,002	5,112
Cost of materials used	"	2,700	2,793
Paid for work given out to other firms	"	8	17
Net output	"	2,294	2,302
Average number of persons employed (excluding outworkers)... ..	No.	15,137	15,493
Net output per person employed (excluding outworkers)	£	152	149
Mechanical power available :—			
Prime movers	H.P.	310	853
Electric motors driven by purchased electricity	"	2,333	2,147
Number of returns	No.	287	307
Number of establishments	"	306	*

* 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 3,932, the corresponding figure for 1924 being 4,266. Though the numbers employed in 1930 by the small firms was about 21 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 numbers employed by the small firms represented about 22 per cent. of the total, but the gross output of these firms was about 18 per cent. of the total. It should be noted, however, that 292 firms to which schedules were sent at the 1930 Census and about 500 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.

The value of the recorded gross output of the small firms in 1924 was £1,145,000; particulars of the principal classes of goods included in this figure are given below:—

	£'000
Saddlery and harness	200
Trunks, travelling bags, cases, etc. :—	
Light leather work	80*
Heavy leather work	26
Of materials other than leather... ..	40*
Leather straps, belts, etc.	93
Fancy goods of leather	79
Other goods made	60
Total	578

In addition, the small firms were responsible for the greater part (88 per cent.) of the repair work recorded in this trade in 1924; the aggregate amount returned by firms employing 10 persons or less in that year was £558,000 for repair work and £13,000 for other work done for the trade.

The Final Report on the 3rd Census of Production (1924) for this trade included a sum of £414,000 in respect of saddlery hardware, harness furniture and cart-gear and of £12,000 in respect of other goods produced by firms employing more than ten persons on the average. For purposes of comparison with the 1930 Census these firms are included in the Chain, Nail, Screw and Kindred Trades, the report on which forms part of a separate volume.

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 (excluding outworkers).	Net output per person employed.
		£'000.	£'000.		£
11-24	112	649	307	1,973	157
25-49	85	985	441	3,110	142
50-99	51	1,121	488	3,554	137
100-199	29	1,212	511	3,680	139
200 and over	10	1,035	547	2,820	194
TOTAL	287	5,002	2,294	15,137	152

* These two items include the small output in Northern Ireland, which cannot be shown separately.

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 (excluding outworkers).	Net output per person employed.
		£'000.	£'000.		£
1	1930 147	3,091	1,470	8,370	176
	1924 147	2,943	1,293	7,887	164
2	1930 19	279	113	933	121
	1924 19	241	102	649	157
5	1930 82	1,285	561	4,624	121
	1924 92	1,504	711	5,631	126
6	1930 19	152	62	514	121
	1924 20	142	67	503	133
9 and 10... ..	1930 11	125	62	481	128
	1924 13	134	61	427	143
Other areas	1930 9	70	26	215	120
	1924 16	148	68	396	172
TOTAL	1930 287	5,002	2,294	15,137	152
	1924 307	5,112	2,302	15,493	149

Northern Ireland.—Owing to the risk of disclosing particulars relating to individual firms, separate details as to the production of the Saddlery, Harness and Leather Goods Trade in Northern Ireland have not been published, the information obtained having been combined with that for the Leather Trade. The aggregate figures for the two trades in 1930 and 1924 are shown below and relate, for each year, to firms that employed more than five persons on the average.

Particulars.	Unit.	1930.	1924.
Value of goods made and work done (Gross output)	£'000	37	22
Cost of materials used and amount paid to other firms for work given out	"	22	14
Net output	"	15	8
Average number of persons employed	No.	145	72
Net output per person employed	£	103	111

* For particulars see page xviii.

Production.

Principal products.—The following table shows the value of saddlery, harness, trunks, etc., made in 1930 and 1924 for sale:—

Kind of goods.	1930.				1924.
	Returned on schedules for				Total.
	The Saddlery, Harness, etc., Trade.		All trades.		
	Value.	Entries.	Value.	Entries.	Value.
	£'000.	No.	£'000.	No.	£'000.
Saddlery and harness	212	38	212	38	312
Horse clothing	39	9	45	14	62
Whips	29	6	29	6	23
Saddletrees	—	—	—	—	16
Trunks, bags and other solid leather goods:—					
Light leather work (travelling bags, etc., exclusive of the value of fittings for dressing cases, etc.)	485	88	521	102	1,030*
Heavy leather work (portmantaux, trunks, sample cases, etc.)	310	30	336	34	219
Travelling bags, trunks and cases of materials other than leather	906	73	939	74	788
Trunks, bags and cases of leather and of materials other than leather, not separately distinguished	45	3	50	4	—
TOTAL—Trunks, travelling bags and cases	1,746	...	1,846	...	2,037
Parts of trunks, travelling bags, etc., so far as recorded separately	—	—	—	—	38
Leather straps, belts, braces, dog collars, etc.	309	68	361	85	412
Fancy goods (ladies' handbags, purses, pocket books, etc.):—					
Of leather	2,085	155	2,289	185	2,239
Of artificial leather	140	25	142	29	109
Other leather goods†	51	9	102	18	144
TOTAL VALUE—Principal products	4,611	...	5,026	...	5,392

* Including the value of fittings in some instances.

† Except apparel, machinery belting and sports goods.

Repair work and work done for the trade.—The total amounts recorded by firms employing more than ten persons in respect of repair and other work done in 1930 and 1924 were as follows:—

	1930.	1924.
	£'000	£'000
Repair work	51	79
Work done for the trade	17	17
	68	96

As mentioned earlier in this report (page 352) the greater part of the repair work and an appreciable proportion of the work done for the trade is carried out by firms employing on the average ten persons or less.

Volume of production in 1930 and 1924.—The absence of quantitative particulars of production precludes precise comparison of the volume of production in the two years. The total value of the output of the principal products in 1930 was recorded as £5,026,000, as against £5,392,000 in 1924. The average value of leather, other than upper leather, dressed in 1930 was about the same as in 1924, and there was also little difference between the average values of the imports of such leather in the two years. The average wage of operatives employed in this trade was about the same in 1930 as in 1924. The change in the volume of production of saddlery, harness, trunks, etc., between 1924 and 1930 may therefore not differ greatly from the change in the recorded value of the output. It should, however, be pointed out that the average selling value in 1930 of dressed leather of hide, calf and kip (other than upper leather) was substantially lower than in 1924, and if the goods made in this trade consisted to a large extent of such leather, the volume of production in 1930 would be much greater relative to 1924 than that shown by the value figures. On the basis of such information as is available, it may fairly be estimated that the volume of production in 1930 was at least 93 per cent. of that in 1924.

Exports and imports.—The absence of particulars of quantity and of the output of the small firms in 1930 makes impracticable any comparison of the production of saddlery, harness, leather trunks, etc., with the overseas trade in these goods. The following table shows the value of the exports from the United Kingdom in 1930 and 1924, together with corresponding particulars of retained imports:—

Kind of goods.	Exports.		Retained imports.	
	1930.	1924.	1930.	1924.
	£'000.	£'000.	£'000.	£'000.
Saddlery and harness	150	268	3	6
Trunks, bags and other solid leather goods	97	210	28	8
Fancy goods:—				
Of leather	371	394	1,117	217
Of artificial leather	13	11	110	391
Other descriptions of leather goods*	243	259	127	102

* Excluding apparel, machinery belting and sports goods.

Particulars of the exports and imports of travelling bags, trunks and cases of materials other than leather are not separately recorded in the Trade Returns.

Other products.—In addition to the output shown in the table of principal products on page 354, the following goods were produced in 1930 and 1924 by firms that made their returns on schedules for the Saddlery, Harness and Leather Goods Trade. These goods are dealt with in the reports on those trades in which the principal output was recorded.

Kind of goods.	1930.	1924.
	Value.	Value.
	£'000.	£'000.
Leather or canvas sports goods	227	109
Other goods made	96	161
TOTAL	323	270

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)	742	4,451	2,593	8,972	3,335	13,423
Administrative, technical and clerical staff (as at 18th October)	94	1,010	138	704	232	1,714
TOTAL	836	5,461	2,731	9,676	3,567	15,137
1924.						
Operatives (average for the year)	1,031	5,622	2,608	8,063	3,639	13,685
Administrative, technical and clerical staff (as at 18th October)	81	1,137	113	671	194	1,808
TOTAL	1,112	6,759	2,721	8,734	3,833	15,493
Average number of outworkers:—						
1930	21		180		201	
1924	24		59		83	

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	83	—	83	110	—	110
Internal combustion engines :—						
Gas	116	24	140	680	49	729
Petrol, kerosene, or other light oils ...	15	—	15	7	7	14
Heavy oils	72	—	72	—	—	—
TOTAL	286	24	310	797	56	853
	Kw.	Kw.	Kw.	Kw.	Kw.	Kw.
ELECTRIC GENERATORS.						
Driven by						
Reciprocating steam engines	40	—	40	—	—	—
Internal combustion engines :—						
Gas	—	—	—	141	—	141
Petrol, kerosene, or other light oils	3	—	3	—	—	—
TOTAL	43	—	43	141	—	141
	H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
ELECTRIC MOTORS.						
Driven by						
Electricity generated in same works	77	—	77	180	—	180
Electricity generated in other works under same ownership ...	6	—	6	—	—	—
Purchased electricity	2,139	194	2,333	1,907	240	2,147
TOTAL	2,222	194	2,416	2,087	240	2,327

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.
	Tons.	Tons.
Coal	541	1,276
Coke	45	1,160
		B.T.U. (Kw.-hrs.) '000.
Electricity used for all purposes :—		
Generated in same works		64
Generated in other works under same ownership		9
Purchased		2,266
TOTAL—Electricity		2,339

TABLES.

I. Summary of results.

Particulars.	Unit.	England and Wales.	Scotland.	Great Britain.
Value of goods made and work done (Gross output)	£'000.	4,877	125	5,002
Cost of materials used	"	2,637	63	2,700
Paid for work given out to other firms... ..	"	8	—	8
Net output	"	2,232	62	2,294
Average number of persons employed (excluding outworkers)	No.	14,656	481	15,137
Net output per person employed (ex- cluding outworkers)	£	152	128	152
Mechanical power available :—				
Prime movers	H.P.	260	50	310
Electric motors driven by purchased electricity	"	2,166	167	2,333

II. Production.

Goods sold or added to stock and work done.	England and Wales.	Scotland.	Great Britain.
	Value.	Value.	Value.
	£'000.	£'000.	£'000.
Saddlery and harness	*	*	212
Horse clothing	*	*	39
Whips	29	—	29
Trunks, bags and other solid leather goods :—			
Light leather work (travelling bags, etc., exclusive of the value of fittings for dressing cases, etc.)	463	22	485
Heavy leather work (portmanteaux, trunks, sample cases, etc.)	*	*	310
Travelling bags, trunks and cases of materials other than leather	887	19	906
Trunks, bags and cases of leather and materials other than leather, not separately distinguished	45	—	45
Leather straps, belts, braces, dog collars, etc....	*	*	309
Fancy goods (ladies' handbags, purses, pocket books, etc.) :—			
Of leather	2,075	10	2,085
Of artificial leather	*	*	140
Other leather goods	42	—	42
Leather or canvas sports goods	177	50	227
Other goods made	103	2	105
TOTAL VALUE OF GOODS MADE	4,812	122	4,934

Goods sold or added to stock and work done.	England and Wales.	Scotland.	Great Britain.
	Amount received.	Amount received.	Amount received.
	£'000.	£'000.	£'000.
Repair work	48	3	51
Work done for the trade	17	—	17
TOTAL VALUE OF WORK DONE	65	3	68
TOTAL VALUE OF GOODS MADE AND WORK DONE (GROSS OUTPUT)	4,877	125	5,002

* Owing to the possible disclosure of information relating to individual firms, separate particulars for England and Wales and for Scotland cannot be given.

III. Employment.

A. NUMBERS EMPLOYED IN WEEK ENDED 18TH OCTOBER, 1930 (EXCLUDING OUTWORKERS).

Persons employed (excluding outworkers).	Males.		Females.		Males and females.	
	Under 18.	All ages.	Under 18.	All ages.	Under 18.	All ages.
<i>England and Wales :—</i>						
Operatives	712	4,284	2,535	8,837	3,247	13,121
Administrative, etc.* ...	89	983	134	684	223	1,667
TOTAL	801	5,267	2,669	9,521	3,470	14,788
<i>Scotland :—</i>						
Operatives	37	211	84	222	121	433
Administrative, etc.* ...	5	27	4	20	9	47
TOTAL	42	238	88	242	130	480
<i>Great Britain :—</i>						
Operatives	749	4,495	2,619	9,059	3,368	13,554
Administrative, etc.* ...	94	1,010	138	704	232	1,714
TOTAL	843	5,505	2,757	9,763	3,600	15,268

* Administrative, technical and clerical staff.

B. OPERATIVES EMPLOYED (EXCLUDING OUTWORKERS) 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	12,859	433	13,292	July 19th	12,861	433	13,294
Feb. 15th	12,986	436	13,422	Aug. 16th	12,737	434	13,171
Mar. 15th	13,162	435	13,597	Sept. 13th	12,864	436	13,300
Apl. 12th	13,155	443	13,598	Oct. 18th	13,121	433	13,554
May 17th	13,112	444	13,556	Nov. 15th	13,213	424	13,637
June 21st	12,933	439	13,372	Dec. 13th	12,860	412	13,272
AVERAGE FOR THE 12 MONTHS ...					12,989	434	13,423

C. NUMBERS OF OUTWORKERS AT TWO SPECIFIED PERIODS IN 1930.

Country.	January.			July.		
	Males.	Females.	Total.	Males.	Females.	Total.
<i>England and Wales ...</i>	18	199	217	22	156	178
<i>Scotland</i>	1	—	1	1	4	5
<i>Great Britain</i>	19	199	218	23	160	183

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.
PRIME MOVERS.						
Reciprocating steam engines	H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
83	—	—	—	83	—	
Internal combustion engines :—						
Gas	116	24	—	—	116	24
Petrol, kerosene or other light oils ...	15	—	—	—	15	—
Heavy oils	22	—	50	—	72	—
TOTAL	236	24	50	—	286	24
TOTAL OF PRIME MOVERS INSTALLED	260		50		310	

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.
ELECTRIC GENERATORS.	Kw.	Kw.	Kw.	Kw.	Kw.	Kw.
Driven by						
Reciprocating steam engines ...	40	—	—	—	40	—
Internal combustion engines :—						
Petrol, kerosene or other light oils ...	3	—	—	—	3	—
TOTAL ...	43	—	—	—	43	—
TOTAL OF ELECTRIC GENERATORS INSTALLED ...	43		—		43	
ELECTRIC MOTORS.	H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
Driven by						
Electricity generated in same works ...	77	—	—	—	77	—
Electricity generated in other works under same ownership ...	6	—	—	—	6	—
Purchased electricity	1,975	191	164	3	2,139	194
TOTAL ...	2,058	191	164	3	2,222	194
TOTAL OF ELECTRIC MOTORS INSTALLED	2,249		167		2,416	

V. Consumption of fuel.

Kind of fuel used.	England and Wales.	Scotland.	Great Britain.
	Tons.	Tons.	Tons.
Coal used for power ...	541	—	541
Coke used for power ...	45	—	45
	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 ...	64	—	64
Generated in other works under same ownership ...	9	—	9
Purchased ...	2,189	77	2,266
TOTAL—Electricity ...	2,262	77	2,339