

BOARD OF TRADE

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*The Report on the
Census of Production
for 1954*

Volume 7: Industry C

HAIR, FIBRE AND KINDRED INDUSTRIES



*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

PRICE 1s 6d NET

The Report on the Census of Production for 1954

VOLUME 7 INDUSTRY C

HAIR, FIBRE AND KINDRED INDUSTRIES

THIS REPORT on the Hair, Fibre and Kindred Industries relates to establishments engaged wholly or mainly in (a) the manufacture of coir mats and matting, (b) the processing of animal hair and the manufacture of hair felt and upholstery padding of hair or fibre, (c) the cleaning and dressing of kapok and vegetable down, and (d) the purifying and dressing of feathers and down. Normally these industries are independent of each other, but since they are all small they are grouped together. The cleaning and dressing of fibres and bristles is excluded, being covered by the report on the Brushes and Brooms Industry.

Establishments mainly engaged in the manufacture of hair cloth, though included here for 1951, were classified for 1954 to the Woollen and Worsted industry. In 1951 they accounted for £1.9 million of the gross output of larger establishments and 574 of their total employment.

The industries (a), (b) and (c) above correspond to minimum list heading 129(3) in the Standard Industrial Classification, while (d) is included in the final miscellaneous manufactures heading 199(3).

There were no larger establishments in Northern Ireland in the register for this industry.

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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 (a)
	1948	1951	1954		
	£ million	£ million	£ million	£ million	£ million
Gross output (production)	8.4	14.4	11.5	0.76	..
Net output	3.7	4.5	3.9	0.26	..
Total stocks and work in progress					
At beginning of year	1.6	2.5	1.6	0.11	..
Change during year	+ 0.0	+ 0.9	+ 0.2	+ 0.02	..
Capital expenditure less disposals (b)	0.2	0.3	0.2	0.01	..
Wages and salaries	1.3	1.9	1.7	0.11	..
Total employment (including working proprietors)	Thousands	Thousands	Thousands	Thousands	Thousands
	5.2	6.1	4.4	0.28	..

(a) Owing to the risk of disclosure relating to individual firms, separate particulars for Wales cannot be given.

(b) 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
FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS				
Number of establishments	No.	87	107	84
Total value of sales and work done	£'000	8,128	13,459	10,686
Products on hand for sale		443	734	519
and work in progress		+ 24	+ 285	+ 102
Gross output (production) (a)		8,068	13,744	10,788
Purchases of materials and fuel		4,461	9,674	6,668
Stocks of materials and fuel		1,076	1,674	1,006
Cost of materials and fuel used		+ 10	+ 602	+ 45
Payment for work done on materials given out		4,451	9,072	6,623
Payment for transport (b)		66	196	238
		84	188	249
Net output		3,552	4,288	3,679
Average number of employees		4,390	5,120	3,613
Total employment (d)		575(c)	731	566
Net output per person employed (d)	£	4,975	5,859	4,180
		714	732	880
Wages and salaries	£'000	944	1,404	1,230
Capital expenditure		329	458	389
New building work (e)		48	74	74
Plant and machinery		114	159	123
Vehicles		19	20	16
		23	75	65
		1	10	16
FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS				
Number of returns	No.	37	41(f)	38
Total employment, including working proprietors		172	252(f)	240

(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.

HAIR, FIBRE AND KINDRED INDUSTRIES
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	23	1,015	374	345	58	107	42	18	926
25 - 49	29	2,776	879	879	156	309	97	72	849
50 - 99	27	4,580	1,583	1,622	272	533	180	125	836
100 - 299	5	2,418	842	767	80	281	71	48	995
Total	84	10,788	3,679	3,613	566	1,230	389	262	880

(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.

Analysis according to specialisation within the industry, 1954
Larger establishments in the United Kingdom

TABLE 4

	Unit	Specialist producers of				Remainder of the industry	Total
		Coir manufac-tures	Hair and Manufac-tures thereof	Feathers, Down and Kapok	Needle Felt (not wool)		
Number of establishments	No.	14	7	12	23	28	84
Total value of sales and work done	£'000	727	1,033	1,459	5,040	2,427	10,686
Sales of characteristic products	"	651	649	1,294	4,616	-	-
Products on hand for sale {at beginning of year	"	60	97	125	142	95	519
and work in progress {change during year	"	+ 35	+ 14	- 22	+ 61	+ 14	+ 102
Gross output (production)	"	762	1,048	1,437	5,101	2,441	10,788
Purchases of materials and fuel	"	407	729	943	3,096	1,494	6,668
Stocks of materials {at beginning of year	"	109	185	153	310	248	1,006
and fuel {change during year	"	- 10	+ 52	- 10	+ 13	+ 1	+ 45
Cost of materials and fuel used	"	417	677	952	3,084	1,493	6,623
Payment for work done on materials given out	"	-	-	-	230	8	238
Payment for transport	"	19	12	27	123	68	249
Net output	"	326	358	458	1,664	873	3,679
Average number {operatives	No.	541	438	346	1,118	1,170	3,613
of employees {others	"	117	51	76	151	171	566
Total employment (a)	"	658	489	423	1,269	1,341	4,180
Net output per person employed (a)	£	496	732	1,082	1,311	651	880
Wages and salaries {of operatives	£'000	143	121	130	466	370	1,230
{of others	"	56	26	60	130	117	389
Capital expenditure (b)	"	-	-	22	34	18	74
New building work	"	-	-	21	48	40	123
Plant and machinery {acquisitions (b)	"	9	6	-	13	2	16
{disposals	"	-	-	-	-	-	-
Vehicles {acquisitions (b)	"	4	5	14	21	21	65
{disposals	"	-	1	6	4	5	16

(a) Excluding outworkers and including working proprietors.

(b) Excluding capital expenditure for establishments not yet in production.

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		Entries
	Quantity	Value	Quantity	Value	
		£'000	No.	£'000	Number
Coir manufactures					
Coir pile mats			169,438 Th. cwt. 15.1	94	12
			1.4	18	
			..	80	
Other coir mats, matting and rugs	Th.sq.yds. 2,376	1,029	Th.sq.yds. 209 Th.cwt. 6.5	71	22
			Th.sq.yds. 1,109	427	
			..	90	
Other coir manufactures	..	842	..	670	24
Hair and manufactures thereof					
Animal hair, processed					
Curled (including second-hand curled hair, cleaned, recarded, etc.)	Th.cwt. 62.6	1,056	Th.cwt. 50.5 ..	663 106	12
Dried, cleaned or dressed for purposes other than brushmaking (a)	10.6	253	8.9 ..	169 20	
Hair felt, other than needle felt (b)	44.2 ..	455 1,087	4.1 ..	47 152	10
Feathers, down and kapok					
Feathers and down purified or dressed	49.5	1,229	58.9 ..	898 121	14
Kapok and vegetable down, cleaned, dressed, etc.	12.5 ..	240 38	13.9 ..	214 272	
Needle felt, other than of wool, including needle felt with a backing of other materials	Th.sq.yds. 17,649	3,926	Th.sq.yds. 28,922	5,138	27
Upholstery padding of hair or fibre on a hessian base	4,310 ..	1,084 1,034	3,547 ..	703 1,070	
Sisal mats, matting and rugs	144 ..	103 35	220 ..	151 95	5
Algerian fibre and other similar vegetable upholstery filling (c)	10.3 ..	37 29	32.8 ..	44 105	
Other principal products of the trade	..	85	..	146	..
Waste products	..	40	..	30	..
Work done for the trade or on commission (d)	..	227	..	232	..
Total		12,830(e)		11,825	..
Sales in other industries (see Table 6)		2,450(e)		2,035	
Principal products of this industry sold by establishments in the industry		10,380(e)		9,790	78

(a) For dried, cleaned or dressed hair for brushmaking see the Brushes and Brooms Industry (Volume 11, Industry C).

(b) These figures include all felts manufactured by firms previously in the Roofing Felts Industry (now part of the Building Materials Industry) other than roofing felts, saturated asbestos felts and felt base for manufacture into floor coverings.

(c) So far as recorded separately.

(d) Amount charged.

(e) Amended figures.

HAIR, FIBRE AND KINDRED INDUSTRIES
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	
Coir manufactures	Th.sq.yds.	£'000	Number	
Coir pile and other coir mats, matting and rugs	..	36	7	11C
Other coir manufactures	..	401	6	7B, 6H
Needle felt, including needle felt with a backing of other materials				
Other than of wool	3,721	505	6	6L, 6C
Upholstery padding of hair or fibre on a hessian base	419	241	5	7B, 11A, 10A
	..	306		
Other principal products of the trade including animal hair, dried, cleaned, curled and for purposes other than brushmaking; hair felt, other than needle felt; feathers and vegetable down; kapok, cleaned, dressed, etc.; sisal mats, matting and rugs and Algerian fibre and other similar vegetable filling	..	543	23	
Work done for the trade or on commission	..	2	..	
Total		2,035		

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

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

TABLE 7

	1954	
	Quantity	Value
Animal hair, dried, cleaned or dressed for brushmaking, and fibres and bristles dressed	Th.cwt.	£'000
	1.1	96
Soft furnishings	..	22
Cotton manufactures	..	104
Wool manufactures	..	173
Other goods	..	165
	..	337
Total		896

TABLE 8 - Total make of intermediate products
Larger establishments in the United Kingdom
This table is not applicable to the industry.

HAIR, FIBRE AND KINDRED INDUSTRIES
Purchases of materials and fuel, 1954
Larger establishments in the United Kingdom

TABLE 9

	Quantity	Cost
	Th.cwt.	£'000
Materials		
Coir fibre	241.8	402
Cow, ox, bull or elk hair	43.9	303
Horse hair	4.3	61
	..	206
Hog hair	36.0	224
Other hair	6.2	69
	..	92
Vegetable fibres, other than coir	293.6	691
	..	291
Coir yarn	53.6	241
	..	36
Feathers, including down	84.2	535
	..	68
Kapok and vegetable down	15.5	250
	Th.sq.yds.	
Hessian piece goods	39,298	1,315
Packing materials	..	69
All other purchased materials	..	1,619
Fuel and electricity	Th.tons	
Coal	14.7	60
Coke	2.7	14
Liquid fuels (including creosote/pitch mixtures)		
For use in internal combustion engines	Th.gal.	
Motor spirit (petrol) for use in road vehicles and derv. fuel	220.8	40
Other	21.7	2
For burning in furnaces, boilers, kilns, etc.	59.5	7
Gas purchased	Th.therms	
From Gas Boards	80.5	5
From other sources, including other departments of the same firms	-	-
Electricity purchased (a)	Th.kWh.	
From Electricity Boards	8,770	63
From other sources, including other departments of the same firms	..	1
All other purchased fuel		2
Total Cost		6,668

(a) The total quantity of electricity generated in firms' own establishments in this industry in 1954 was 343 Th.kWh.

HAIR, FIBRE AND KINDRED INDUSTRIES

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

TABLE 10

Larger establishments in the United Kingdom

	1951	1954
	Number	Number
Average number of employees		
Operatives	5,120	3,613
Administrative, technical and clerical employees	731	566
Total	5,851	4,179
	£'000	£'000
Wages and salaries paid to		
Operatives	1,404	1,230
Administrative, technical and clerical employees	458	389
Total	1,861	1,619
	£	£
Wages and salaries per head		
Operatives	274	340
Administrative, technical and clerical employees	627	688
		£'000
Superannuation and other pension funds for employees and dependents (b)		
Employers' contributions	..	8
		Number
Employees covered	..	672
		£'000
Pension, etc. payments to former employees and dependents (b)	..	3

(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).

	1951	1954
	Number	Number
Canteen workers		
Males	1	5
Females	27	18
	28	23
Other workers		
Males	47	64
Females	19	32
	66	96
Total excluded employees	94	119

Outworkers. The firms in this industry employed 4 male and 67 female outworkers in 1951 and 1 male and 33 female outworkers in 1954, payments to them being £6,000 in 1951 and £8,000 in 1954.

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

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

TABLE 11

	1951			1954		
	Males	Females	Total	Males	Females	Total
Working proprietors	8	-	8	1	-	1
Operatives	2,895	2,204	5,099	2,312	1,487	3,799
Administrative, technical and clerical employees	492	259	751	350	225	575
Total employees	3,387	2,463	5,850	2,662	1,712	4,374

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

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