

THE FELLMONGERY TRADE.

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Introductory.*

The tables on pages 192 to 194 are based on returns received from firms in Great Britain that were wholly or mainly engaged in fellmongery work during 1924. The number of such separate returns was 130. About 20 firms to which schedules were sent did not furnish returns, but these firms for the most part had very small establishments and they included some which had ceased operations before the end of the censal year. On the basis of the information available it is estimated that they did not employ more than 60 persons in all and that their total net output probably did not exceed £15,000. No production was recorded in Northern Ireland in 1924.

* See also the Notes on pp. vii to xv.

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. The information received in connexion with the Census of 1912, when details of output were not required from firms employing five persons or less, was not sufficiently complete to warrant its use for purposes of comparison.

Particulars.	Uni .	1924.	1907.
Value of products (Gross output)	£'000	5,264	2,201
Cost of materials used	„	4,313	2,054
Net output	„	951	147
Average number of persons employed	No.	2,753	1,764
Net output per person employed.. .. .	£	345	83
Mechanical power available :—			
Prime movers	H.P.	2,424	699
Electric motors driven by purchased electricity	„	1,105	(not recorded).

Qualifications affecting comparisons.—In considering the above table and the other tables in this report which show figures for different 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 Great Britain and the whole of Ireland, but that of 1924 applied only to Great Britain and Northern Ireland. The exclusion of Southern Ireland in 1924 probably does not seriously affect the comparability of the figures.

(3) In the Census of 1907 tanning establishments that maintained departments for the de-woolting of skins to be tanned and dressed in their own works were allowed to furnish comprehensive returns in respect of their whole business on the schedule for the Leather Trade, but in 1924 attempts were made to obtain as many separate returns as possible in respect of such departments. The figures for 1924 are, consequently, somewhat more representative of fellmongery work as a whole than were those for 1907.

Production.

Detailed information relating to the output of the Fellmongery Trade in 1924 will be found in Table II on page 192.

Principal products.—The following table shows, for 1924 and 1907, the value and, where recorded, the quantity of the principal products of the Fellmongery Trade, the aggregate figures for each year being inclusive of the output of similar products recorded on schedules for other trades.

Kind of products.	1924.				1907.	
	Returned on schedules for				Total.	
	The Fellmongery Trade.		All trades.			
	Quantity.	Selling value.	Quantity.	Selling value.	Quantity.	Selling value.
Sheep and lambskins, pulled	Th. skins. 9,318	£'000. 1,355	Th. skins. 9,862	£'000. 1,434	} 9,921	1,005
Goatskins and skins of other animals, worked	186	23	186	23		
Wool	Th. lbs. 37,536	3,454	Th. lbs. 42,512	4,034	41,914	1,815
Sheepskin rugs and mats ..	..	208	..	208	..	30
Waste and by-products ..	..	33	..	33	..	32
TOTAL VALUE—PRINCIPAL PRODUCTS .. ..	..	5,073	..	5,732	..	2,882

The value of the output as shown above is free from substantial duplication. As stated above, in 1907 tanners and leather dressers included the output of their fellmongery departments with that of their other departments, while in 1924 separate returns were, when possible, obtained from such firms in respect of their fellmongery work. As the quantity and value of skins dealt with by tanners was returned in 1907 in the form of tanned or dressed leather, a direct comparison of output cannot be made between the two years on the basis of the total number of skins treated. All firms, however, whether fellmongers, tanners, or leather dressers were required to state the quantity of wool pulled from sheep- and lambskins, and the total of such wool affords some means of comparison. The output of wool by fellmongers in 1907 was 27,979,000 lbs. and by other firms, 13,935,000 lbs., while in 1924 the output of wool returned on schedules for the Fellmongery Trade was 37,536,000 lbs. and that on schedules for other trades, 4,976,000 lbs.

The number of sheep- and lambskins imported with the wool left on and retained in the United Kingdom in 1924 was 7,161,548. According to the reports on the Agricultural Output of England and Wales, of Scotland, and of Northern Ireland for 1925, the quantity of skin wool obtained from sheep and lambs slaughtered in the United Kingdom in the year ended May, 1925, was approximately as follows :—

Country.	Skin wool.	Wool per skin.
	lbs.	lbs.
England and Wales	15,750,000	3·0
Scotland	6,000,000	2·5
Northern Ireland	370,000	2·7
TOTAL	22,120,000	..

On the basis of these percentage figures, the total quantity of skins available from sheep and lambs slaughtered in the United Kingdom may be estimated at about 7½ millions, and the total number of sheep- and lambskins available in 1924 from all sources may be put roughly at about 15 million. Taking account of exports of woolled skins (533,000) and of the output of sheepskin rugs and mats, valued at £208,000 and representing (on the basis of the export value of woolled sheepskins) about 130,000 skins, the number of woolled skins available for treatment in the United Kingdom in 1924 may, therefore, be estimated at about 14,300,000, half imported and half of native origin. It would thus appear that nearly 4½ million sheep- and lambskins were treated by leather dressers making glove and similar leathers and furnishing combined returns for their de-woolling and dressing departments. Woolled sheepskins imported were not recorded by number in 1907, and the corresponding data for a similar calculation as to the quantity available in that year are, therefore, not available.

About 5,076,000 goatskins were imported into and retained in the United Kingdom in 1924, while only 186,000 goatskins and skins of other animals were treated by firms that made their returns on schedules for the Fellmongery Trade.

Other products.—In addition to the principal products dealt with above, firms that made their returns on schedules for the Fellmongery Trade recorded in 1924 an output of other goods, chiefly leather and skin goods, valued at £191,000. These goods, being of kinds mainly produced in other trades, are dealt with in the reports on those trades. The corresponding figure for 1907 was £25,000.

Cost of materials.—The cost of materials used by firms that made their returns on schedules for the Fellmongery Trade was returned as £4,313,000 in 1924; the corresponding figure for 1907 was £2,054,000.

Net output.—The net output in 1924 of the firms that made their returns on schedules for the Fellmongery Trade (whose gross output was valued at £5,264,000) was £951,000, 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.

The net output per head of persons employed in the censal year 1924 was £345 as compared with £83 in 1907.

Exports and imports.—In 1924 retained imports of de-woolled sheep- and lambskins amounted to 811,670 skins weighing 47,227 cwts., or 6·52 lbs. each, and British exports were 3,976,296 skins weighing 75,603 cwts., or 2·13 lbs. each; the imports were probably mainly sheepskins and the exports lambskins. In 1907 about 1,451,000 de-woolled sheep- and lambskins were imported and retained and 7,696,000 were exported.

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 Fellmongery Trade that 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, 1,329 operatives, or 54 per cent. of the total of 2,445 operatives for the trade as a whole, and their net output totalled £459,000, or 48 per cent. of the aggregate net output of £951,000 for the trade as a whole. The total wage-bill of these firms, as returned to the Ministry of Labour, was £153,000, representing about 33 per cent. of their aggregate net output.

Employment.

The detailed information relating to employment in 1924 is summarised in Table III on page 193. The following table sets out the particulars for that year together with those relating to 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.	Males.		Females.		Males and females.	
	Under 18.	All ages.	Under 18.	All ages.	Under 18.	All ages.
1924.						
Operatives	138	2,068	46	324	184	2,392
Administrative, etc. ..	9	297	9	64	18	361
TOTAL	147	2,365	55	388	202	2,753
1907.						
Wage earners	135	1,579	2	39	137	1,618
Salaried	7	138	—	8	7	146
TOTAL	142	1,717	2	47	144	1,764

The numbers of operatives recorded month by month in 1924 ranged from 83 below the average, in August, to 97 above the average, in December (see Table IIIB, page 193). From March to September the numbers were continuously below the average and above the average in the other months. The mean deviation from the average amounted to 48, or 2 per cent.

Mechanical Power.

The detailed information relating to mechanical power in 1924 is summarised in Table IV on page 194. The following table sets out the particulars for 1924 and 1907 relating to the capacity and kinds of *prime movers* and the capacity of *electric generators* installed.

Power equipment.	1924.			1907.
	Ordinarily in use.	In reserve or idle.	Total.	Total.
	H.P.	H.P.	H.P.	H.P.
PRIME MOVERS :—				
Reciprocating steam engines ..	943	355	1,298	446
Gas engines	979	46	1,025	
Petrol and light oil engines ..	29	—	29	
Heavy oil engines	—	—	—	67
Water power	72	—	72	6
Other power	—	—	—	—
TOTAL	2,023	401	2,424	699
ELECTRIC GENERATORS :—	Kw.	Kw.	Kw.	Kw.
Driven by—				
Reciprocating steam engines ..	98	25	123	—
Gas engines	339	—	339	—
Water power	28	—	28	—
TOTAL	465	25	490	—

No electric generators were reported in 1907.

The capacity of *electric motors* recorded in 1924 was as shown below :—

Electric motors.	1924.		
	Ordinarily in use.	In reserve or idle.	Total.
	H.P.	H.P.	H.P.
Driven by—			
Electricity generated in own works	636	196	832
Purchased electricity	1,037	68	1,105

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 9,000.

TABLES.

I.—Summary of results.

Note.—No production was recorded in Northern Ireland.

Particulars.	Unit.	England and Wales.	Scotland.	Great Britain.
Value of products (Gross output) ..	£'000	4,231	1,033	5,264
Cost of materials used	"	3,402	911	4,313
Net output	"	829	122	951
Average number of persons employed	No.	2,244	509	2,753
Net output per person employed ..	£	369	240	345
Mechanical power available :—				
Prime movers	H.P.	2,178	246	2,424
Electric motors driven by purchased electricity	"	804	301	1,105

II.—Production.

Products sold or added to stock.	Unit.	England and Wales.	Scotland.	Great Britain.
Sheep and lamb skins, pulled ..	<i>Th. skins</i>	7,514	1,804	9,318
Goat skins and skins of other animals, worked	£'000	1,081	274	1,355
	<i>Th. skins</i>	186	—	186
	£'000	23	—	23
TOTAL—Skins treated ..	<i>Th. skins</i>	7,700	1,804	9,504
	£'000	1,104	274	1,378
Wool	<i>Th. lbs.</i>	29,070	8,466	37,536
Sheepskin rugs and mats	£'000	2,704	750	3,454
Other leather and skin goods	£'000	*	*	208
Other, including waste, products	£'000	*	*	191
	£'000	32	1	33
TOTAL VALUE OF PRODUCTS (GROSS OUTPUT)	£'000	4,231	1,033	5,264

* In order to avoid the possible disclosure of information relating to individual firms, figures are given only for Great Britain as a whole.

III.—Employment.

A.—NUMBERS EMPLOYED IN WEEK ENDED 18TH OCTOBER, 1924.

Kind of staff.	Males.		Females.		Males and females.	
	Under 18.	All ages.	Under 18.	All ages.	Under 18.	All ages.
<i>England and Wales :—</i>						
Operatives	100	1,683	39	298	139	1,981
Administrative, etc.*	7	253	6	53	13	306
TOTAL	107	1,936	45	351	152	2,287
<i>Scotland :—</i>						
Operatives	42	441	7	23	49	464
Administrative, etc.*	2	44	3	11	5	55
TOTAL	44	485	10	34	54	519
<i>Great Britain :—</i>						
Operatives	142	2,124	46	321	188	2,445
Administrative, etc.*	9	297	9	64	18	361
TOTAL	151	2,421	55	385	206	2,806

* Administrative, technical and clerical staff.

B.—OPERATIVES EMPLOYED IN ONE WEEK IN EACH MONTH OF 1924.

England and Wales. (Annual average : Males, 1,637 ; Females, 301 ; Total, 1,938.)

Week ended.	Males.	Females.	Total.	Week ended.	Males.	Females.	Total.
Jan. 12th ..	1,623	323	1,946	July 19th ..	1,645	277	1,922
Feb. 16th ..	1,614	321	1,935	Aug. 16th ..	1,611	274	1,885
March 15th ..	1,616	308	1,924	Sept. 13th ..	1,645	277	1,922
April 12th ..	1,608	313	1,921	Oct. 18th ..	1,683	298	1,981
May 17th ..	1,606	296	1,902	Nov. 15th ..	1,683	319	2,002
June 21st ..	1,617	295	1,912	Dec. 13th ..	1,695	311	2,006

Scotland. (Annual average : Males, 431 ; Females, 23 ; Total, 454.)

Jan. 12th ..	451	26	477	July 19th ..	393	19	412
Feb. 16th ..	452	23	475	Aug. 16th ..	402	22	424
March 15th ..	444	23	467	Sept. 13th ..	417	22	439
April 12th ..	428	23	451	Oct. 18th ..	441	23	464
May 17th ..	418	22	440	Nov. 15th ..	448	28	476
June 21st ..	414	21	435	Dec. 13th ..	456	27	483

Great Britain. (Annual average : Males, 2,068 ; Females, 324 ; Total, 2,392.)

Jan. 12th ..	2,074	349	2,423	July 19th ..	2,038	296	2,334
Feb. 16th ..	2,066	344	2,410	Aug. 16th ..	2,013	296	2,309
March 15th ..	2,060	331	2,391	Sept. 13th ..	2,062	299	2,361
April 12th ..	2,036	336	2,372	Oct. 18th ..	2,124	321	2,445
May 17th ..	2,024	318	2,342	Nov. 15th ..	2,131	347	2,478
June 21st ..	2,031	316	2,347	Dec. 13th ..	2,151	338	2,489

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	768	340	175	15	943	355
Gas engines	923	46	56	—	979	46
Petrol and light oil engines	29	—	—	—	29	—
Water power	72	—	—	—	72	—
TOTAL	1,792	386	231	15	2,023	401
TOTAL OF PRIME MOVERS INSTALLED	2,178		246		2,424	
ELECTRIC GENERATORS :—	Kw.	Kw.	Kw.	Kw.	Kw.	Kw.
Driven by—						
Reciprocating steam engines	98	25	—	—	98	25
Gas engines	339	—	—	—	339	—
Water power	28	—	—	—	28	—
TOTAL	465	25	—	—	465	25
TOTAL OF ELECTRIC GENERATORS INSTALLED ..	490		—		490	
ELECTRIC MOTORS :—	H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
Driven by—						
Electricity generated in own works ..	636	196	—	—	636	196
Purchased electricity	741	63	296	5	1,037	68