



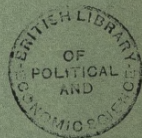
BOARD OF TRADE

FINAL REPORT
on the
CENSUS OF PRODUCTION
FOR 1948

Volume 7

Trade L

BOOT AND SHOE



*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).*

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THREE SHILLINGS NET

8-7-52
 In interpreting the data in the following tables, it is essential to bear in mind not only the qualifications mentioned in this report but also the general explanations and qualifications contained in the separate booklet published in this series by H.M. Stationery Office entitled "Final Reports of the Census of Production for 1948: Introductory Notes", price 2s Od. NET

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* Not applicable to this trade

BOOT AND SHOE TRADE

THIS REPORT on the Boot and Shoe Trade relates to establishments engaged wholly or mainly in the manufacture of boots and shoes (other than of rubber), slippers and clogs and their parts and accessories (except rubber soles and heels, wooden heels and lasts, and clog blocks and irons), and the repair of boots, shoes and clogs for the trade.

This trade corresponds to minimum list headings 148 and 149 in the Standard Industrial Classification.

The treatment of repairers differed in the three years. For 1948, returns were not obtained from firms repairing direct for the general public or from those that undertook repairs in the same establishment as that used primarily for retailing or wholesaling purchased goods. A large number of firms excluded in 1948 were included in 1935. Repairing firms were not covered by the 1937 Inquiry and Table I includes comparable figures for 1935 as well as the total for manufacturers and repairers.

Establishments in this trade in Northern Ireland are excluded in 1948. Owing to the risk of disclosure of information relating to individual firms, separate particulars of the very small output in Northern Ireland were not published for 1935.

CLOTHING
BOOT AND SHOE TRADE
Summary

Larger establishments (a)

TABLE 1

	All sections of the trade	Sections of the trade covered by the 1937 Inquiry		All sections of the trade
	1948 (b)	1937 (c)	1935 (c)	1935 (c)
Gross output (production)	£'000 128,993	£'000 42,940	£'000 39,887	£'000 41,524
Cost of materials and fuel used	74,662	23,361	20,991	21,584
Payment for work done on materials given out	412	65	50	50
Net output	53,919	19,514	18,646	19,890
Wages and salaries of persons employed	29,473 No.	.. No.	.. No.	.. No.
Average number of persons employed (d)	111,652 (e)	117,591	115,270	121,437
Net output per person employed (d)	£ 483	£ 166	£ 162	£ 164
Stocks at end of year	£'000	£'000	£'000	£'000
Finished products and work in progress	7,773	..	..	..
Materials and fuel	13,546	..	..	..
Number of establishments	No. 939	No. ..	No. 785	No. 1,093

- (a) For small firms' summary see Table 2.
 (b) Great Britain only.
 (c) United Kingdom.
 (d) Excluding outworkers.
 (e) For an estimate of the total number of persons employed in this trade see Table 3.

The values of gross output and of materials and fuel used are derived in the following way:-

	All sections of the trade	Sections of the trade covered by the 1937 Inquiry		All sections of the trade
	1948	1937	1935	1935
Output of firms in this trade	£'000	£'000	£'000	£'000
Total value of sales (1948) or production (1937 and 1935)				
Principal products (see Table 8)	124,966	42,565	39,354	41,174
Other output (see Table 10)	2,652	375	333	350
Adjustment for changes in stocks and work in progress (see Table 14)	+ 1,819			
Less payment for transport by other firms	129,436 443	42,940	39,887	41,524
Gross output (production)	128,993	42,940	39,887	41,524
Materials and fuel used by firms in this trade				
Purchases (see Table 13)	76,372	23,361	20,991	21,584
Adjustment for changes in stocks (see Table 14)	- 1,710			
Materials and fuel used	74,662	23,361	20,991	21,584

Summary, 1948

Small firms in Great Britain

TABLE 2

	£'000
Gross output (sales)	1,687
Cost of materials and fuel purchased during the year	839
Payment for work done on materials given out	61
Net output (a)	787 No.
Average number of persons employed (b)	1,617 £
Net output per person employed	487 No.
Number of returns	352

- (a) The value of net output is the difference between the value of gross output (sales) and the cost of materials and fuel purchased during the year, less payment for work done on materials given out.
 (b) Including working proprietors. See Table 25(11) for further particulars of employment.

Estimated average employment, 1948

All firms in Great Britain

TABLE 3

As returned by firms	
Employing on average more than ten persons (a)	111,652
Employing on average ten persons or less (b)	1,617
	113,269
Estimated average employment in firms not making satisfactory returns	301
Estimated average employment in all firms	113,570

- (a) See Tables 1, 15(1) and (11).
 (b) See Table 2.

Analysis by size, 1948

Larger establishments in Great Britain

TABLE 4

Average number employed	Establishments	Gross output	Net output	Persons employed	Remuneration			Net output per person employed
					Wages	Salaries	Total	
	No.	£'000	£'000	No.	£'000	£'000	£'000	£
11 - 24	186	3,488	1,508	3,335	685	150	835	452
25 - 49	224	8,848	3,785	7,974	1,630	355	1,985	475
50 - 99	220	18,720	7,651	15,654	3,399	709	4,108	483
100 - 199	166	27,729	11,570	23,346	5,216	900	6,116	496
200 - 299	58	16,883	6,946	14,141	3,091	708	3,799	491
300 - 399	36	15,303	6,328	12,668	2,975	610	3,585	500
400 - 499	18	9,886	4,118	8,285	1,798	338	2,136	497
500 - 749	18	11,453	4,724	10,612	2,236	486	2,722	445
750 and over	13	16,683	7,289	15,437	3,538	648	4,187	472
Total	939	128,993	53,919	111,652	24,569	4,904	29,473	483

Analysis by standard region, 1948

Larger establishments in Great Britain

TABLE 5

Region	Establishments	Gross output	Net output		Persons employed	Remuneration		
			Value	Percentage of total		Wages	Salaries	Total
	No.	£'000	£'000		No.	£'000	£'000	£'000
England								
Northern	21	2,416	1,133	2.1	2,671	515	147	662
East and West Ridings of Yorkshire	39	3,272	1,158	2.1	2,720	583	99	682
North Midland	473	71,661	29,647	55.0	58,934	13,428	2,523	15,951
Eastern	46	12,489	5,741	10.6	12,121	2,494	535	3,028
London and South Eastern	112	9,676	4,531	8.4	8,649	2,039	443	2,481
Southern	13	474	201	0.4	472	102	16	118
South Western	49	6,369	2,643	4.9	5,307	1,164	266	1,430
Midland	37	5,437	2,299	4.3	4,909	1,092	206	1,297
North Western	104	14,366	5,270	9.8	12,387	2,486	525	3,011
Total England	894	126,160	52,623	97.6	108,170	23,902	4,758	28,659
Wales	11	589	290	0.5	655	119	30	149
Scotland	34	2,245	1,007	1.9	2,827	548	116	664
Great Britain	939	128,993	53,919	100.0	111,652	24,569	4,904	29,473

Analysis according to specialisation within the trade, 1948

Larger establishments in Great Britain

TABLE 6

	Establishments	Gross output	Sales of characteristic products	Net output	Persons employed	Remuneration			Net output per person employed
						Wages	Salaries	Total	
	No.	£'000	£'000	£'000	No.	£'000	£'000	£'000	£
Specialist producers of Boots, shoes, sandals and slippers, and parts thereof	771	125,421	113,456	51,816	106,217	23,408	4,752	28,160	488
Clogs	7	175	143	71	185	42	6	48	386
Repairs for the trade	128	2,486	2,486	1,533	4,094	942	111	1,053	375
Remainder of the trade	35	912		498	1,156	176	36	212	431
Total	939	128,993		53,919	111,652	24,569	4,904	29,473	483

TABLE 7 - Total make of intermediate products: Larger establishments

This table is not applicable to the trade.

Sales (or production) of the principal products of the trade, including sales (or production) of these products by establishments classified to other trades

Larger establishments

TABLE 8

	1948(a) (b)			1937(c) (d)		1935(c)	
	Sales		Entries	Production		Production	
	Quantity	Value		Quantity	Value	Quantity	Value
	Th. doz. pairs	£'000	No.	Th. doz. pairs	£'000	Th. doz. pairs	£'000
Boots and shoes with uppers wholly or mainly of leather (other than sandals, slippers and house shoes)							
Surgical boots	7	261	54	..	(e)	..	(e)
Men's (not surgical) (f)	..	26					
Heavy, industrial type, with soles of leather	307	4,442	89				
Medium or light				2,409	12,743	2,185	11,425
With soles of leather	1,499	23,678	211				
With soles of rubber or rubber composition	257	3,796	162				
With soles of other materials	4	72	..	425	1,572	391	1,526
Women's (not surgical) (f)							
Heavy, industrial type, with soles of leather	6	63	24				
Medium or light							
With soles of leather	2,732	40,128	311				
With soles of rubber or rubber composition	636	9,348	241	3,893	17,106	3,894	16,526
With soles of wood or other materials (including light munition and industrial type "clogs")	15	281	9				
Youths' and boys' (not surgical) (f)							
With soles of leather	503	4,110	198				
With soles of rubber or rubber composition	150	1,189	112	621	1,647	659	1,712
With soles of other materials	1	6	..				

TABLE 8 (contd.)

	1948 (a) (b) Sales			1937(c) (d) Production		1935 (c) Production	
	Quantity	Value	Entries	Quantity	Value	Quantity	Value
	Th. doz. pairs	£'000	No.	Th. doz. pairs	£'000	Th. doz. pairs	£'000
Boots and shoes, with uppers wholly or mainly of leather (other than sandals, slippers and house shoes) (contd.)							
Maids' and girls' (not surgical) (f)							
With soles of leather	594	4,631	139	1,196	2,545	1,125	2,386
With soles of rubber or rubber composition	260	1,831	85				
With soles of wood and other materials (including light munition and industrial type "clogs")	13	101	..				
Infants' (not surgical) (f)	1,124	3,884	83	860	952	755	828
Sheepskin boots							
Men's	1	40	11	639	1,309	483	997
Women's	33	874	41				
Boots and shoes (other than sandals, slippers and house shoes) with uppers of fabric and similar materials, other than with soles of rubber							
Men's	14	122	28	639	1,309	483	997
Women's	197	1,639	58				
Youths' and boys'	2	18	11				
Maids' and girls'	22	84	13				
Infants'	78	129	18				
Sandals not wholly of rubber							
Men's	116	1,086	69	1,874	2,785	1,547	2,219
Women's	256	1,949	59				
Children's	685	3,108	60				
Slippers and house shoes, other than with soles of rubber							
Men's	358	2,182	107	1,874	2,785	1,547	2,219
Women's	677	3,522	111				
Children's	368	1,022	67				

TABLE 8 (contd.)

	1948 (a) (b) Sales			1937 (c) (d) Production		1935 (c) Production	
	Quantity	Value	Entries	Quantity	Value	Quantity	Value
	Th. doz. pairs	£'000	No.	Th. doz. pairs	£'000	Th. doz. pairs	£'000
Clogs (other than light munition and industrial type)	22	157	11	17	45(g)	15	43(g)
Parts of boots and shoes (other than of rubber or wood)							
Uppers	50 ..	258 187	20	49	74	41	82
Soles of leather	3,088	3,204	63	2,172	483	1,787	405
Heels of leather	1,845 Th. gross pairs	960	32	2,195 Th. gross pairs	332	2,616 Th. gross pairs	395(h)
Insoles and socks							
Of cork	72	133	9	133	79(1)	149	91(1)
Of leather	424	383	47	195	77(j)	136	62(j)
Of other materials	94	165	20				
Stiffeners	515	683	21	..	559	..	507
Other parts of boots and shoes	.. Th. doz. pairs	2,344	108	.. Th. doz. pairs	223	.. Th. doz. pairs	146
Leggings and gaiters of leather (k)	5	44	13	18	60	24	70
Grindery and mercery	..	16	8	..	36	..	44
Boots and shoes, and parts, unclassified	..	63	10	-	-	-	-
Leather scrap and waste products	Th. cwts. 251 ..	164 88	383	..	37(1)	..	3(1)
		Amount charged			Amount received		Amount received
Repair work	Th. doz. pairs						
Boots and shoes	839	2,808	223	..	65	..	1,903
Clogs							
Re-clogged	..	2	..				
Re-ironed	1	1	5				
Other repair work		5	16				

TABLE 8 (contd.)

	1948(a) (b) Sales			1937(c) (d) Production		1935(c) Production	
	Quantity	Amount charged	Entries	Quantity	Amount received	Quantity	Amount received
		£'000	No.		£'000		£'000
Work done for the trade or on commission		318	120		41		63
Total		125,607	..		42,770		41,433
Less sales (or production) in other trades (see Table 9)		641	..		205		259
Total principal products of this trade sold or made by establishments in the trade		124,966	819		42,565		41,174

(a) For output of small firms see Table 23(11).

(b) Great Britain only.

(c) United Kingdom.

(d) Repairing firms and firms classified to the trades not covered by the 1937 Inquiry recorded the following output for 1935:-

	Th. doz. pairs	£'000
Boots and shoes of leather	1	6
Slippers and house shoes	16	23
Parts of boots and shoes	..	35
Clogs	1	4
	Th. gross pairs	
Socks for boots and shoes	7	3
Repair work		1,821
Work done for the trade		6
Total		1,898

(e) Not recorded separately.

(f) Not described as excluding surgical boots for 1937 and 1935.

(g) Described as "Clogs".

(h) Including some wooden heels.

(i) Described as "Socks of cork or fibre".

(j) Described as "Socks of materials other than cork or fibre".

(k) The figures may include some leggings and gaiters other than of leather.

(l) So far as recorded separately.

Sales (or production) of principal products of the trade by
establishments classified to other trades

Larger establishments

TABLE 9

	1948(a) Sales			1937(b) Production		1935(b) Production	
	Quantity	Value	Entries	Quantity	Value	Quantity	Value
	Th. doz. pairs	£'000	No.	Th. doz. pairs	£'000	Th. doz. pairs	£'000
Boots and shoes with uppers wholly or mainly of leather (other than sandals, slippers and house shoes)							
Surgical boots	..	21	8	-	-	..	(c)
Boots and shoes of other materials except rubber	-	-	-	-	-	17	6
Slippers and house shoes, other than with soles of rubber							
Men's	-	4	6	} 18	26(d)	28	39(d)
Women's	1	7	6				
Children's	-	2	6				
Parts of boots and shoes (other than of rubber or wood)	Th. gross pairs			Th. gross pairs		Th. gross pairs	
Insoles and socks	50	91	..	45	35	70	38
Stiffeners	46	187	5	..	(c)	..	(c)
Other parts of boots and shoes, including uppers	..	212	16	-	-	-	-
Leggings and gaiters of leather	Th. doz. pairs			Th. doz. pairs		Th. doz. pairs	
	2	24	7	3	12	8	22
Boots and shoes and parts, unclassified	..	63	10	} ..	132	..	154
Repair work							
Boots and shoes	3	9(e)	..				
Work done for the trade or on commission		22(e)	..				
Total		641	..		205		259

(a) Great Britain only.

(b) United Kingdom.

(c) Not recorded separately.

(d) Recorded as "Slippers and house shoes, other than of rubber".

(e) Amount charged.

Sales (or production) in the trade of other than principal products

TABLE 10

Larger establishments:

	1948 (a)(b) Sales		1937 (c) Production		1935 (c) Production	
	Quantity	Value	Quantity	Value	Quantity	Value
Rubber boots	Th.doz. pairs	£'000	Th.doz. pairs	£'000	Th.doz. pairs	£'000
Of a length (front of sole to heel tip) exceeding 11 inches						
Industrial, knee height or less	36	286	}			
Other	6	42				
Wellingtons						
Of a length exceeding 9½ inches but not exceeding 11 inches	15	82	29	60	35	68
Of a length not exceeding 9½ inches	50	175				
Other descriptions	24	118				
Rubber shoes						
Bathing shoes, sandals and the like	-	-	54	48	25	21
Black or brown plimsolls (whether plain or speckled)	88	190	}			
Other descriptions (including goloshes and overshoes, and shoes of rubber and other material)	..	1,301				
Rubber soles	..	139(d)				
Boot and shoe laces	..	41(d)				
Leather and leather manufactures	..	60(d)	..	86	..	46
Other goods	..	218				
Total		2,652		375		350

- (a) For output of small firms see Table 23 (11).
 (b) Great Britain only.
 (c) United Kingdom.
 (d) So far as recorded separately.

Analysis of sales, 1948
Larger establishments in Great Britain

TABLE 11

	Sales	Percentage of total sales
	£'000	
Sales (or transfers) to other organisations under the same control		
Productive works	775	0.6
Export sales organisations (including branches abroad)	1,437	1.2
Other wholesale or selling organisations	26,263	21.1
Retail shops, etc.	5,448	4.4
Total sales (or transfers) to other organisations under the same control	33,923	27.2
Sales to independent buyers		
Exports invoiced directly overseas	2,456	2.0
Exports invoiced to Crown Agents and purchasing houses in this country of individual firms and governments abroad	716	0.6
His Majesty's Government and Local Authorities (other than productive establishments)	1,980	1.6
Manufacturers, repairers, builders, mines, public utilities, and transport and other productive undertakings	6,210	5.0
Wholesalers, merchants and other agents for resale	44,567(a)	35.8
Retailers, including multiple shops, caterers and N.A.A.F.I., for resale	34,318	27.6
Other businesses (including farmers) and institutions of all kinds	45	-
Members of the public, including employees	299	0.2
Total sales to independent buyers	90,591	72.8
Total	124,514	100.0

- (a) Of this total £37,473,000 was recorded as divided between £1,581,000 for export and £35,892,000 for other sales.

Production, exports and imports
of certain principal products (a)

TABLE 12

		Production (b) (c)	Exports (d)	Retained imports (e)
		Th. doz. pairs	Th. doz. pairs	Th. doz. pairs
Boots and shoes with uppers wholly or mainly of leather (other than surgical boots, sandals, slippers and house shoes)				
Men's				
With soles of leather	{ 1948	1,806	196	11
	{ 1937	2,409 (f)	154	3
With soles of other materials (including clogs)	{ 1948	283	23	-
	{ 1937	442 (f)	9	3
Total men's	{ 1948	2,089	219	11
	{ 1937	2,851 (f)	163	6
Women's				
With soles of leather	1948	2,737	105	39
With soles of other materials	1948	651	15	2
Total women's	{ 1948	3,388	120	41
	{ 1937	3,893 (f)	121	229
Youths' and boys'	1948	654	24	}
Maids' and girls'	1948	667	24	
Infants'	1948	1,124	47	
Total children's	{ 1948	2,644	95	1
	{ 1937	2,677 (f)	110	7
Total boots and shoes with uppers wholly or mainly of leather	{ 1948	8,121	433	53
	{ 1937	9,421 (f)	394	242
Boots and shoes (other than surgical boots, sandals, slippers and house shoes) with uppers of fabric and similar materials other than with soles of rubber; and sheepskin boots				
Women's	1948	230	3	1
Other	1948	117	28	1
Total boots and shoes with uppers of fabric and similar materials	{ 1948	346	31	1
	{ 1937	639 (f)	38	18
Slippers and house shoes (other than with soles of rubber) and sandals not wholly of rubber (g)				
Women's	1948	677	51	9
Other	1948	726	88	2
Total slippers and house shoes	{ 1948	1,403	139	10
	{ 1937	1,874 (h)	125	61
		£'000	£'000	£'000
Parts of boots and shoes (other than wooden heels and parts of rubber)	{ 1948	8,317	179	42
	{ 1937	1,827	130	61

- (a) Figures of sales (or production) refer only to larger establishments in Great Britain (1948) or the United Kingdom (1937). All recorded exports from and imports into the United Kingdom are given in the table. The figures, therefore, are not strictly comparable.
- (b) Sales in 1948 and production for sale in 1937.
- (c) Including sales (or production) by establishments classified to other trades.
- (d) Valued at f.o.b.
- (e) Valued at c.i.f.
- (f) Including sandals.
- (g) The oversea trade figures exclude sandals with soles of rubber.
- (h) Excluding sandals.

BOOT AND SHOE
Purchased materials and fuel
Larger establishments

TABLE 13

	1948 (a) (b)		1937 (c)		1935 (c)	
	Materials and fuel purchased		Usage of purchased materials and fuel			
	Quantity	Cost	Quantity	Cost	Quantity	Cost
	Th. cwts.	£'000	Th. cwts.	£'000	Th. cwts.	£'000
Materials						
Sole leather						
Bends and butts	593.4	11,305	943.6	5,004	973.0	4,710
Bellies, shoulders and other offal	695.9	7,231				
Upper leather						
Box and willow calf (d)	9.7	1,931	58.9	3,024	69.2	3,147
Glacé kid	22.6	3,107	33.6	1,616	38.4	1,746
Box and willow sides and other hide upper leather (full chrome)	53.6	7,565	110.0	3,910	96.3	3,026
Suede, other than lining	23.1	3,630				
Other upper leather						
Full chrome	19.7	2,799				
Vegetable and semi-chrome	73.3	6,240				
Shaped parts of boots and shoes						
Of leather						
Soles	1,781.2	2,079	..	(e)	..	(e)
Top pieces	876.6	296				
Stiffeners	562.1	475				
	..	87				
Of rubber or rubber composition						
Soles	548.6	505	1,184.2	291	988.2	274
Heels	954.9	354	2,127.3	252	1,680.5	195
Wooden heels	1,888.3	1,194	..	(e)	..	(e)
Packing materials	..	1,852	..	698	..	(e)

TABLE 13 (contd.)

	1948 (a) (b)		1937 (c)		1935 (c)	
	Materials and fuel purchased		Usage of purchased materials and fuel			
	Quantity	Cost	Quantity	Cost	Quantity	Cost
Materials (contd.)	Mill. sq. ft.	£'000		£'000		£'000
Lining leather	83.1	5,088				
Fabrics for uppers	Mill. sq. yds. 5.6	1,640				
Fabrics for linings	16.1	2,163				
Rubber composition	Th. cwt. 18.8	211				
Rubber, including synthetic rubber	..	131				
Other materials for soles and heels	244.4	3,632	..	8,235	..	8,222 (f)
Boot and shoe laces	Th. gross of single laces 940.6	359				
Eyelets and boothooks	Mill. 1,307.5	172				
Other grindery and mercery	..	4,483				
All other purchased materials	..	6,306				
Fuel and electricity	Th. tons		Th. tons		Th. tons	
Coal	27.9	82	29.9	39	30.2	34
Coke	18.1	75	..	(e)	18.1	25
Electricity purchased (g)	Th. B. T. U. (kW. hrs.)		Th. B. T. U. (kW. hrs.)		Th. B. T. U. (kW. hrs.)	
From public supply	53,591	307				
From other sources	133	1	42,850	184	43,641	194
Electricity obtained from other works under the same ownership	780	3				
Motor spirit (petrol) and derv. fuel	Th. galls.				Th. galls.	
Used for road vehicles	348	33	..	(e)	..	(e)
Used for other power purposes	343	23				
Other oil fuel (including creosote/pitch mixtures)	569	26	..	(e)	489	11 (h)
Gas purchased	Th. therms					
From public supply	1,233	58				
From other sources	..	8				
Gas obtained from other works under the same ownership	11	-	..	108	..	(e)
All other purchased fuel	..	23				
Total		76,372		23,361		21,584

- (a) For materials and fuel purchased by small firms see Table 24 (11).
 (b) Great Britain only.
 (c) United Kingdom.
 (d) Described as "Full chrome, including box veals" in 1948.
 (e) Not recorded separately.
 (f) Including fuel not specified separately.
 (g) The total quantity of electricity consumed in 1948 was 59,773,000 B.T. units including 5,269,000 generated in the same works.
 (h) Described as "Heavy fuel oil".

Stocks of finished products and work in progress and stocks of materials and fuel, 1948

Larger establishments in Great Britain

TABLE 14

	At beginning of year		At end of year	
	Quantity	Value	Quantity	Value
	Th. doz. pairs	£'000	Th. doz. pairs	£'000
Finished products				
Boots and shoes (not surgical) with uppers wholly or mainly of leather				
With soles of leather				
Men's	51	539	63	842
Women's	90	817	100	1,064
Youths' and boys'	10	49	9	58
Maids' and girls'	14	69	16	88
	..	50	..	60
Slippers and house shoes, other than with soles of rubber				
Women's	19	70	17	63
Other finished products	..	425	..	818
Work in progress		3,936		4,780
Total finished products and work in progress		5,955		7,773
Materials and fuel	Th. cwts.		Th. cwts.	
Sole leather	164.8	1,728	160.3	2,218
			..	335
Upper leather	Mill. sq. ft.		Mill. sq. ft.	
Lining leather	54.0	4,904	48.5	5,470
Fabrics for uppers	17.0	886	14.7	887
	Mill. sq. yds.		Mill. sq. yds.	
Other descriptions of materials and fuel	1.9	426	2.0	458
	..	56	..	53
	..	3,836	..	4,145
Total materials and fuel		11,836		13,546

Employment and Remuneration (a)

Larger establishments

(i) Private Firms

TABLE 15

	Operatives (average for the year)			Administrative, technical and clerical employees (b)			Total					
	1948 (c)	Sections of the trade covered by the 1937 Inquiry		1948 (c)	Sections of the trade covered by the 1937 Inquiry		1948 (c)	Sections of the trade covered by the 1937 Inquiry				
		1937 (d)	1935 (d)		1937 (d)	1935 (d)		1937 (d)	1935 (d)			
Males												
Under 18	4,421	10,359	9,833	10,444	169	302	281	300	4,590	10,661	10,114	10,744
All ages	54,069	60,500	60,441	65,577	6,012	4,599	4,501	4,913	60,081	65,099	64,942	70,490
Females												
Under 18	5,641	12,721	11,296	11,403	910	1,013	744	796	6,551	13,734	12,040	12,199
All ages	46,922	48,962	47,012	47,333	4,455	3,530	3,316	3,614	51,377	52,492	50,328	50,947
Total												
Under 18	10,062	23,080	21,129	21,847	1,079	1,315	1,025	1,096	11,141	24,395	22,154	22,943
All ages	100,991	109,462	107,453	112,910	10,467 (e)	8,129	7,817	8,527	111,458 (e) (f) (g)	117,591	115,270	121,437
Total remuneration	£'000				£'000				£'000			
	24,569	..	..	..	4,904	..	..	..	29,472	..	..	..

(a) Excluded employees. The following numbers were employed at establishments in this trade but are not included in the table or in any other report (e.g., employees in a separate selling or transport organisation for which separate accounts are kept):-

Canteen workers 20 males 533 females
Other workers 406 males 667 females

- (b) Number at September 25, 1948, October 16, 1937, and October 12, 1935.
(c) Great Britain only.
(d) United Kingdom.
(e) There were, in addition; 173 working proprietors (158 males and 15 females) in 1948. Working proprietors are included in the 1937 and 1935 figures.
(f) The employers' share of contributions to all National Insurance Schemes payable during the year in respect of these workers amounted to £831,000.
(g) The following persons (included in this total) were employed on special work by establishments employing 100 or more persons:-

	Operatives	Administrative, technical and clerical employees
Transport of goods outside the premises	67	
Maintenance and repair of firms' buildings, but not plant	95	
Research work not directly connected with current production however charged	19	19

In addition to the employees in the above table the firms in this trade employed outworkers whose numbers (and remuneration in 1948) are set out below.

	Average number of outworkers employed			Total amount paid to outworkers
	Males	Females	Total	
1948	342	3,407	3,749	£'000
1937	551	1,490	2,041	476
1935	711	1,272	1,983	..

(ii) Government Departments (a)

TABLE 15 (contd.)

	Operatives (average for the year)	Administrative, technical and clerical employees (b)	Total
	1948	1948	1948
Males			
Under 18	7	-	7
All ages	18	3	21
Females			
Under 18	-	-	-
All ages	-	-	-
Total			
Under 18	7	-	7
All ages	18	3	21
Total remuneration	£'000	£'000	£'000
	-	-	(c)

- (a) One of H.M. Borstal Institutions.
(b) At September 25, 1948.
(c) Less than £500.

Wages and salaries paid, 1948 (a)
Larger establishments in Great Britain

TABLE 16

	Amount paid by all establishments	Establishments making returns for the calendar year					
		Amount paid	Percentage of annual remuneration paid in				
			First quarter	Second quarter	Third quarter	Fourth quarter	Year
Wages and salaries of	£'000	£'000					
Operatives	24,569	15,352	24.5	24.6	24.6	26.3	100.0
Administrative, technical and clerical employees	4,904	3,066	24.0	24.2	24.3	27.5	100.0
Total	29,473	18,418	24.4	24.6	24.5	26.5	100.0

(a) Including bonus and commission payments.

TABLE 17 - Payments for work done on materials given out, 1948

Larger establishments in Great Britain

The total amount paid for work done on materials given out was £412,000.

Payments for certain services, 1948
Larger establishments in Great Britain

TABLE 18

	Amount paid
	£'000
Repair and maintenance	
Of buildings	358
Of plant, machinery and vehicles	896
Unclassified	389
Hire of plant, machinery and vehicles	774
Advertising and market research	
Advertising in newspapers, magazines and periodicals	338
Other advertising services (poster display, despatch of circulars, etc.) and market research	79
Unclassified	339
Payments made for research work	
To research associations	14
To universities, institutions, academic bodies and similar agencies	2
To other commercial concerns	25
Postage, telephone, telegrams and cables	191
Commercial insurance premiums	354
Rates (excluding water rates) payable in the year	77(a)

(a) Including £4,000 returned as "Rates (including water rates) payable in the year".

Plant, machinery and vehicles acquired and disposed of, 1948

Larger establishments in Great Britain

TABLE 19

	Acquisitions		Disposals
	New	Second-hand	
	£'000	£'000	£'000
Plant and machinery	1,114	58	52
Vehicles	180	76	42
Total	1,294	134	94

Capital expenditure on building work and changes in occupation of buildings and land, 1948

Larger establishments in Great Britain

TABLE 20

	£'000	£'000
1. Capital expenditure on building work (a)		327
2. Existing buildings and land (b)		
(1) Capital cost of freeholds bought	97	
Estimated capital value of		
(11) Rented property newly occupied in the year (c)	217	
(111) Leasehold buildings and land newly occupied in the year	182	
Total of heading 2		497
Total of headings 1 and 2		823
3. Existing buildings and land relinquished (d)		
(1) Selling value of freeholds sold	2	
(11) Estimated value of other properties relinquished	36	
Total of heading 3		37
4. Headings 1 and 2 less heading 3		786

- (a) Excluding site value which, where appropriate, is included in heading 2(1).
 (b) The figures do not reflect changes in ownership of previously occupied land and buildings.
 (c) Property which is occupied under an agreement for the payment of rent without the purchase of a lease or the payment of a premium.
 (d) Including property destroyed or abandoned.

1948

Summary

Larger establishments

TABLE 21

	England	Wales	Scotland	Great Britain
	£'000	£'000	£'000	£'000
Gross output (production)	126,160	589	2,245	128,993
Cost of materials and fuel used	73,131	297	1,234	74,662
Payment for work done on materials given out	406	2	4	412
Net output	52,623	290	1,007	53,919
Wages and salaries of persons employed	28,659	149	664	29,473
	No.	No.	No.	No.
Average number of persons employed (a)	108,170	655	2,827	111,652
	£	£	£	£
Net output per person employed (a)	486	442	356	483
Stocks at end of year	£'000	£'000	£'000	£'000
Finished products and work in progress	7,548	38	188	7,773
Materials and fuel	13,170	71	305	13,546
	No.	No.	No.	No.
Number of establishments	894	11	34	939

(a) Excluding outworkers.

The values of gross output and of materials and fuel used are derived in the following way:-

	England	Wales	Scotland	Great Britain
	£'000	£'000	£'000	£'000
Output of firms in this trade				
Total value of sales (see Table 23(1))	124,835	583	2,200	127,618
Adjustment for changes in stocks and work in progress	+ 1,757	+ 8	+ 54	+ 1,819
Less payment for transport by other firms	126,590	591	2,255	129,436
Gross output (production)	431	2	10	443
Materials and fuel used by firms in this trade				
Purchases (see Table 24(1))	74,812	322	1,238	76,372
Adjustment for changes in stocks	- 1,681	- 25	- 4	- 1,710
Materials and fuel used	73,131	297	1,234	74,662

Summary

Small firms

TABLE 22

	England	Wales	Scotland	Great Britain
	£'000	£'000	£'000	£'000
Gross output (sales)	1,622	11	54	1,687
Cost of materials and fuel purchased during the year	814	3	21	839
Payment for work done on materials given out	61	-	-	61
Net output (a)	747	8	32	787
	No.	No.	No.	No.
Average number of persons employed (b)	1,516	19	82	1,617
	£	£	£	£
Net output per person employed	492	422	394	487
	No.	No.	No.	No.
Number of returns	328	7	17	352

(a) The value of net output is the difference between the value of gross output (sales) and the cost of materials and fuel purchased during the year, less payment for work done on materials given out.

(b) Including working proprietors.

Sales in the trade

Larger establishments (a)

TABLE 23(1)

	England and Wales		Scotland		Great Britain	
	Quantity	Value	Quantity	Value	Quantity	Value
	Th. doz. pairs	£'000	Th. doz. pairs	£'000	Th. doz. pairs	£'000
Principal products						
Boots and shoes with uppers wholly or mainly of leather (other than sandals, slippers and house shoes)						
Surgical boots	..	(b)	..	(b)	7 ..	261 5
Men's (not surgical)						
Heavy, industrial type, with soles of leather	292	4,166	15	276	307	4,442
Medium or light						
With soles of leather	1,475	23,179	24	499	1,499	23,678
With soles of rubber or rubber composition	254	3,731	3	65	257	3,796
With soles of other materials	4	72	-	-	4	72
Women's (not surgical)						
Heavy, industrial type, with soles of leather	..	(b)	..	(b)	6	63
Medium or light						
With soles of leather	2,712	39,780	20	348	2,732	40,128
With soles of rubber or rubber composition	628	9,196	8	151	636	9,348
With soles of wood or other materials (including light munition and industrial type "clogs")	15	281	-	-	15	281
Youths' and boys' (not surgical)						
With soles of leather	492	4,002	11	108	503	4,110
With soles of rubber or rubber composition	146	1,140	4	49	150	1,189
With soles of other materials	1	6	-	-	1	6
Maids' and girls' (not surgical)						
With soles of leather					594	4,631
With soles of rubber or rubber composition	..	(b)	..	(b)	260	1,831

TABLE 23(i) (contd.)

	England and Wales		Scotland		Great Britain	
	Quantity	Value	Quantity	Value	Quantity	Value
	Th. doz. pairs	£'000	Th. doz. pairs	£'000	Th. doz. pairs	£'000
Principal products (contd.)						
Boots and shoes with uppers wholly or mainly of leather (other than sandals, slippers and house shoes) (contd.)						
Maids' and girls' (not surgical) (contd.)						
With soles of wood and other materials (including light munition and industrial type "clogs")	13	101			13	101
Infants' (not surgical)	1,124	3,884			1,124	3,884
Sheepskin boots						
Men's	1	40			1	40
Women's	..	(b)	..	(b)	33	874
Boots and shoes (other than sandals, slippers and house shoes) with uppers of fabric and similar materials, other than with soles of rubber						
Men's	..	(b)	..	(b)	14	122
Women's	197	1,639			197	1,639
Youths' and boys'	2	18			2	18
Maids' and girls'	22	84			22	84
Infants'	78	129			78	129
Sandals not wholly of rubber						
Men's	..	(b)	..	(b)	116	1,086
Women's	254	1,940	2	9	256	1,949
Children's	685	3,108			685	3,108
Slippers and house shoes, other than with soles of rubber						
Men's					357	2,178
Women's	..	(b)	..	(b)	676	3,516
Children's					368	1,021

TABLE 23 (i) (contd.)

	England and Wales		Scotland		Great Britain	
	Quantity	Value	Quantity	Value	Quantity	Value
	Th. doz. pairs	£'000	Th. doz. pairs	£'000	Th. doz. pairs	£'000
Principal products (contd.)						
Clogs (other than light munition and industrial type)	22	157	-	-	22	157
Parts of boots and shoes (other than of rubber or wood)						
Soles of leather	..	(b)	..	(b)	3,088	3,204
Heels of leather	1,845	960			1,845	960
Insoles and socks	540	591			540	591
Stiffeners	469	495			469	495
Other parts of boots and shoes, including uppers	..	2,577			..	2,577
Leggings and gaiters of leather	2	20			2	20
Grindery and mercery	..	16			..	16
Leather scrap and waste products	250	161	1	3	251	164
Repair work	..	85	..	3	..	88
Amount charged						
Th. doz. pairs						
Boots and shoes	720	2,409	116	390	837	2,799
Clogs						
Re-clogged	..	2			..	2
Re-ironed	1	1			1	1
Other repair work		5				5
Work done for the trade or on commission		286		10		297
Total principal products		122,767		2,199		124,966

TABLE 23(i) (contd.)

	England and Wales		Scotland		Great Britain	
	Quantity	Value	Quantity	Value	Quantity	Value
	Th. doz. pairs	£'000		£'000	Th. doz. pairs	£'000
Other output						
Rubber boots						
Of a length (front of sole to heel tip) exceeding 11 inches						
Industrial, knee height or less	36	286			36	286
Other	6	42			6	42
Wellingtons						
Of a length exceeding 9½ inches but not exceeding 11 inches	15	82			15	82
Of a length not exceeding 9½ inches	50	175			50	175
Other descriptions	24	118			24	118
Rubber shoes			-	-		
Black or brown plimsolls (whether plain or speckled)	88	190			88	190
Other descriptions (including goloshes and overshoes, and shoes of rubber and other material)	..	1,301			..	1,301
Rubber soles	..	139			..	139
Boot and shoe laces	..	41			..	41
Leather and leather manufactures	..	60			..	60
Other goods	..	217	..	1	..	218
Total		125,417		2,200		127,618

(a) For output of small firms see Table 23(i).

(b) Owing to the risk of disclosure of information relating to individual firms, separate particulars cannot be given.

Sales in the trade

Small firms

TABLE 23(ii)

	England and Wales		Scotland		Great Britain	
	Quantity	Value	Quantity	Value	Quantity	Value
	Th. doz. pairs	£'000	Th. doz. pairs	£'000	Th. doz. pairs	£'000
Boots and shoes with uppers wholly or mainly of leather (other than sandals, slippers and house shoes)						
Surgical boots	2	116	-	13	2	129
Men's (not surgical)	6	193	1	18	7	211
Women's (not surgical)	..	(a)	..	(a)	3	99
Other (not surgical)	..	(a)	..	(a)	..	84
Other (not surgical)	..	(a)	..	(a)	30	95
Sandals, slippers and house shoes	17	106	-	-	17	106
Clogs	..	33	..	..	..	33
Clog blocks and clog irons	..	(a)	..	(a)	17	121
Other goods made	..	583	..	8	2	2
Leather scrap and waste products	..	3	..	6	..	9
Repair work		Amount charged		Amount charged		Amount charged
Boots and shoes	..	82	..	5	..	87
Clogs	..	(a)	..	(a)	..	6
Re-clogged	..	(a)	..	(a)	..	3
Re-ironed	..	2	..	-	..	2
Other repair work	..	107	..	3	..	109
Work done for the trade or on commission	..	107	..	3	..	109
Total		1,633		54		1,687

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

Purchased materials and fuel

Larger establishments (a)

TABLE 24 (i)

	England and Wales		Scotland		Great Britain	
	Quantity	Cost	Quantity	Cost	Quantity	Cost
	Th. cwts.	£'000	Th. cwts.	£'000	Th. cwts.	£'000
Materials						
Sole leather						
Bends and butts	581.3	11,044	12.0	261	593.4	11,305
Bellies, shoulders and other offal	685.3	7,102	10.6	129	695.9	7,231
Upper leather						
Box and willow calf (full chrome, including box veals)	Mill. sq. ft. 9.5	1,867	Mill. sq. ft. 0.2	64	Mill. sq. ft. 9.7	1,931
Glace kid	22.4	3,068	0.2	38	22.6	3,107
Box and willow sides and other hide upper leather (full chrome)	52.5	7,399	1.0	166	53.6	7,565
Suede, other than lining	23.0	3,602	0.2	28	23.1	3,630
Other upper leather						
Full chrome	19.2	2,750	0.5	48	19.7	2,799
Vegetable and semi-chrome	72.6	6,175	0.6	66	73.3	6,240
Shaped parts of boots and shoes						
Of leather						
Soles	1,758.8	2,045	22.4	34	1,781.2	2,079
Top pieces	863.4	291	13.2	5	876.6	296
Stiffeners	Th. gross pairs { 558.3 471 .. 87		Th. gross pairs { 3.9 4		Th. gross pairs { 562.1 475 .. 87	
Of rubber or rubber composition						
Soles	Th. doz. pairs 532.5	492	Th. doz. pairs 16.1	13	Th. doz. pairs 548.6	506
Heels	925.5	345	29.3	9	954.9	354
Wooden heels	1,884.1	1,192	4.2	2	1,888.3	1,194

TABLE 24 (i) (contd.)

	England and Wales		Scotland		Great Britain	
	Quantity	Cost	Quantity	Cost	Quantity	Cost
		£'000		£'000		£'000
Materials (contd.)						
Packing materials	..	1,830	..	22	..	1,852
Lining leather	Mill. sq. ft. 82.1	5,029	Mill. sq. ft. 1.0	59	Mill. sq. ft. 83.1	5,088
Fabrics for uppers	Mill. sq. yds. 5.6	1,624	..	16	Mill. sq. yds. 5.6	1,640
Fabrics for linings	16.0	2,133	0.1	30	16.1	2,133
Rubber composition	Th. cwts. 18.8	211	Th. cwts. ..	2	Th. cwts. 18.8	211
	..	130	..	..	..	131
Rubber, including synthetic rubber	242.7	3,602	1.7	30	244.4	3,632
Other materials for soles and heels	..	875	..	20	..	896
Boot and shoe laces	Th. gross of single laces 930.4	355	Th. gross of single laces 10.1	4	Th. gross of single laces 940.6	359
Eyelets and boothooks	Mill. 1,288.1	169	Mill. 19.3	3	Mill. 1,307.5	172
Other grindery and mercery	..	4,387	..	96	..	4,483
All other purchased materials	..	6,234	..	72	..	6,306
Fuel and electricity	Th. tons		Th. tons		Th. tons	
Coal	25.6	76	2.3	6	27.9	82
Coke	18.1	75	-	-	18.1	75
Electricity purchased	Th. B.T.U. (kw. hrs.)		Th. B.T.U. (kw. hrs.)		Th. B.T.U. (kw. hrs.)	
From public supply	52,675	300	915	7	53,591	307
From other sources	133	1	-	-	133	1
Electricity obtained from other works under the same ownership	707	2	73	1	780	3
Motor spirit (petrol) and derv. fuel	Th. galls.		Th. galls.		Th. galls.	
Used for road vehicles	344	35	4	-	348	36
Used for other power purposes	343	23	-	-	343	23

TABLE 24 (i) (contd.)

	England and Wales		Scotland		Great Britain	
	Quantity	Cost	Quantity	Cost	Quantity	Cost
Fuel and electricity (contd.)	Th. galls.	£'000	Th. galls.	£'000	Th. galls.	£'000
Other oil fuel (including creosote/pitch mixtures)	569	26	-	-	569	26
	Th. therms		Th. therms		Th. therms	
Gas purchased						
From public supply	1,210 ..	57 8	23	1	1,233 ..	58 8
From other sources	-	-	-	-	-	-
Gas obtained from other works under the same ownership	10	-	1	-	11	-
All other purchased fuel	..	21	..	2	..	23
Total		75,134		1,238		76,372

(a) For materials purchased by small firms see Table 24(ii).

Purchased materials and fuel

Small firms

TABLE 24(ii)

	England and Wales		Scotland		Great Britain	
	Quantity	Cost	Quantity	Cost	Quantity	Cost
Materials and fuel	Th. cwts.	£'000	Th. cwts.	£'000	Th. cwts.	£'000
Sole leather	26.7	340	0.3	7	27.0	346
	Th. sq. ft.		Th. sq. ft.		Th. sq. ft.	
Upper leather	1,419.3 ..	150 24	51.2	6	1,470.5 ..	155 24
Shaped parts of boots and shoes	Th. pairs		Th. pairs		Th. pairs	
Of leather	75.9 ..	14 21	0.5	-	76.4 ..	15 21
Of rubber or rubber composition	168.5 ..	6 2	0.8	-	169.3 ..	6 2
	Th. B. T. U. (kW. hrs.)		Th. B. T. U. (kW. hrs.)		Th. B. T. U. (kW. hrs.)	
Electricity purchased	361 ..	3 2	28	-	389 ..	3 2
All other materials and fuel purchased for making or repairing goods	..	256	..	8	..	264
Total		818		21		839

Employment and remuneration

Larger establishments (a)

TABLE 25 (i)

	England and Wales			Scotland			Great Britain		
	Average number of operatives	Admini- strative, technical and clerical employees (b)	Total	Average number of operatives	Admini- strative, technical and clerical employees (b)	Total	Average number of operatives	Admini- strative, technical and clerical employees (b)	Total
Males									
Under 18	4,165	169	4,334	256	-	256	4,421	169	4,590
All ages	52,575	5,843	58,418	1,494	169	1,663	54,069	6,012	60,081
Females									
Under 18	5,398	886	6,284	243	24	267	5,641	910	6,551
All ages	45,940	4,300	50,240	982	155	1,137	46,922	4,455	51,377
Total									
Under 18	9,563	1,055	10,618	499	24	523	10,062	1,079	11,141
All ages	98,515	10,143 (c)	108,658 (c) (d)	2,476	324 (c)	2,800 (c) (d) (e)	100,991	10,467 (c)	111,458 (c) (d) (e)
Total remuneration	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
	24,021	4,788	28,809	548	116	664(e)	24,569	4,904	29,472

(a) For employment in small firms see Table 25(ii).

(b) Number at September 25, 1948.

(c) There were, in addition, 173 working proprietors (158 males, 15 females) in Great Britain; 152 males, 15 females in England and Wales, and 6 males in Scotland.

(d) The employers' share of contributions to all National Insurance Schemes payable during the year in respect of these workers amounted to a total of £831,000; £810,000 for England and Wales, and £22,000 for Scotland.

(e) Excluding H.M. Borstal Institution.

In addition to the employees in the above table the firms in this trade employed on the average 3,749 outworkers (342 males and 3,407 females) in Great Britain. Owing to the risk of disclosure of information relating to individual firms separate particulars for England and Wales and for Scotland cannot be given.

Employment
Small firms

TABLE 25 (ii)

	England and Wales	Scotland	Great Britain
Males			
Under 18	71	6	77
All ages	1,041	53	1,094
Females			
Under 18	57	3	60
All ages	494	29	523
Total			
Under 18	128	9	137
All ages	1,535	82	1,617

Monthly index of employment of operatives: Larger establishments
(average employment in 1948 = 100)

TABLE 26

Month	Monthly index (a)			Month	Monthly index (a)		
	England and Wales	Scotland	Great Britain		England and Wales	Scotland	Great Britain
1948				1948			
January	98.8	98.2	98.8	August	99.7	100.6	99.7
February	99.7	98.5	99.6	September	99.9	100.9	99.9
March	99.5	97.8	99.4	October	100.9	101.7	100.9
April	99.8	99.6	99.6	November	101.7	102.1	101.7
May	100.7	99.1	100.6	December	101.8	100.1	101.8
June	99.1	99.9	99.1	Percentage employment in this trade covered by the index			
July	98.7	101.2	98.8		61.6	60.1	61.6

(a) The index numbers are calculated from the number of operatives employed in one week in each month returned by larger establishments that made returns for the calendar year 1948.

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