

THE MANUFACTURED STATIONERY TRADES.

Contents.

	Page
INTRODUCTORY	335
Summary of results	335
Qualifications affecting comparisons	336
Value of output and cost of materials	337
PRODUCTION	337
Principal products	337
Other products and work done	338
Work done for the trade	339
Value of output free from duplication	339
Cost of materials and work given out	340
Net output	340
Exports and imports	340
WAGES IN 1924	341
EMPLOYMENT	341
MECHANICAL POWER	342
MACHINERY EQUIPMENT	342
TABLES	344

Introductory.*

The tables on pages 344 to 348 are based on returns received from firms in Great Britain and Northern Ireland whose business in 1924 consisted wholly or mainly in the manufacture of notepaper, envelopes, paper bags and miscellaneous articles of paper and cardboard. The number of separate returns was 542. About 80 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 250 persons in all and that their total net output probably did not exceed £40,000.

Summary of results.—The following table shows the main results of the Censuses of 1924, 1912 and 1907, comparisons between the figures for the three years being subject to the qualifications mentioned in the next paragraph.

* See also the Notes on pages vii to xv.

Particulars.		1924.	1912.	1907.
Value of goods made and work done (Gross output)	£'000	10,362	5,829	4,414
Cost of materials used	"	4,816	2,961	2,342
Paid for work given out to other firms	"	94	57	95
Net output	"	5,452	2,811	1,977
Average number of persons employed (excluding outworkers)	No.	29,787	36,032	26,227
Net output per person employed (excluding outworkers)	£	183	78	75
Mechanical power available :—				
Prime movers	H.P.	4,402	5,670	3,620
Electric motors driven by purchased electricity	"	7,312	2,446	(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 Censuses of 1907 and 1912 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 does not seriously affect the comparability of the figures since in 1907 the number of persons employed in the whole of Ireland in these trades was 906 only with a gross output valued at £93,000 : further, according to the Census of Production taken by the Government of the Irish Free State in respect of the year 1926, the total output of manufactured stationery products in that year was only £57,000.

(3) The Censuses of 1907 and 1924 extended to all firms, however small, but in 1912 firms employing not more than five persons (excluding the proprietors) were merely required to state the average number of persons employed by them in the year. According to the information so furnished, the average number of persons employed in the establishments thus excluded was 1,248 or about 3½ per cent. of the number employed by the remaining firms, as shown in the above table. Moreover, correspondence on defective returns for 1912 had not been completed when the war compelled suspension of this work. In these circumstances detailed information for 1912 is not given in the remainder of this report. The resulting defects in the aggregate figures given above are, however, not important.

(4) The figures given in the preceding table do not represent the total output of manufactured stationery products, as a considerable output of such goods was produced by paper makers,

printers, etc., who made their returns on schedules for other trades. The table on page 338 shows that in 1924 about one-third of the aggregate value of the principal manufactured stationery products was produced by firms in other trades ; in 1907 the proportion was about one-fourth. In particular, more than two-thirds of the total production of paper bags in 1924 was returned on schedules for other trades.

Value of output and cost of materials.—The figures in the above table representing the value of goods made and work done are the aggregates of the figures recorded by the firms that made returns, and for the reasons explained in paragraphs (i) and (ii) on page xiii, they over-state the value of the output of the Manufactured Stationery Trades considered as a whole. The matter is discussed on pages 339 and 340, where it is estimated that the value, free from duplication, of the output of the Manufactured Stationery Trades in 1924 was about £10,300,000. The figures in the table representing the cost of materials used are substantially free from duplication.

Production.

Detailed information relating to the output of the Manufactured Stationery Trades in 1924 will be found in Table II on page 345.

In addition to the output dealt with in this report, envelopes valued, on a cost basis, at £6,200 were produced in 1924 by the General Post Office.* The corresponding figure for 1907 was £2,150.

Principal products.—The following table shows for the years 1924 and 1907 the value of the principal products of the Manufactured Stationery Trades, including not only those produced by firms that made their returns on schedules for these trades, but also those recorded by firms whose returns were furnished on schedules for other trades.

Kind of output.	1924.	1907.
	Selling value.	Selling value.
	£'000	£'000
Manufactured stationery	4,465	3,074
Paper bags	3,270	910
Picture post cards, Christmas cards, calendars, etc.	1,396	573
Pattern cards	561	238
Luggage labels	231	68
Picture and photograph mounts	276	106
Ticket and showcard writing and mounting	458	155
Other articles of paper or cardboard	1,327	150
Stationers' sundries, not of paper or cardboard	184	60
TOTAL—Principal products	12,168	5,334

* Such production falls within the scope of the report on Public Utility Services which forms part of a separate volume.

In comparing the details of output shown above, it should be noted that in 1907 manufacturing stationers were not required to give separate particulars of the various classes of goods made by them, representations having been received to the effect that these particulars would not ordinarily be available. Some firms, however, returned particulars of the values of the separate classes of goods made by them, but others included sums in respect of these classes of goods under the general heading of *manufactured stationery*. Thus about 60 per cent. of the total output returned on schedules for the Manufactured Stationery Trades in 1907 was recorded under the general heading. In 1924 firms were required to state particulars of their output in greater detail, a summary of which is given in the following table:—

Kind of output.	Returned on schedules for	
	The Manufactured Stationery Trades.	All trades.
	Selling value.	Selling value.
	£'000	£'000
Notepaper and pads	408	486
Envelopes	1,954	2,110
Letter files, loose leaf systems, etc. .. .	623	711
Other manufactured stationery (compendiums, boxed stationery, etc.)	1,032	1,158
Paper bags	947	3,270
Picture post cards	151	205
Christmas cards, greeting cards, playing cards, calendars, etc.	1,006	1,191
Pattern cards	156	561
Picture and photograph mounts	222	276
Luggage labels	207	231
Ticket and showcard writing and mounting .. .	368	458
Patterns and transfers	141	144
Other articles of paper and cardboard	435	1,183
Stationers' sundries, not of paper or cardboard .. .	126	184
TOTAL—Principal products	7,776	12,168

The amounts incorporated in the foregoing table as returned on schedules for trades other than the Manufactured Stationery Trades were practically all returned by paper makers and printers and bookbinders. The particulars obtained as to the quantity of the output of certain products are shown in the table on page 340.

Other products and work done.—In addition to the principal products shown in the preceding tables, firms that made their returns on the schedule for the Manufactured Stationery Trades recorded, for each of the censal years, an output of other goods, as shown below; these goods, being of kinds mainly produced in other trades, are dealt with in the reports on those trades.

Kind of output.	1924.	1907.
	Selling value.	Selling value.
Manuscript books	£'000 973	£'000 *
Paper, enamelled, stained, marbled, waxed, etc. .. .	198	137
Boxes and cartons of paper and cardboard (including folding boxes)	219	160
Job and general printing:—		
Letterpress	253	} 135
Lithographic	45	
Other	447	
TOTAL—Printing	745	135
Other goods made	333	100
TOTAL	2,468	532

* Manuscript books made by manufacturing stationers were returned in 1907 under the general heading *manufactured stationery* and their value is included in the £3,074,000 recorded under that heading (see page 337).

A considerable proportion of the amount shown for job and general printing includes the cost of the paper on which the work was done.

Work done for the trade.—In addition to the output dealt with in the preceding paragraphs, firms that made their returns on schedules for the Manufactured Stationery Trades stated that they received £118,000 in respect of work done for the trade in 1924. The following table gives the particulars recorded for that year and the available particulars for 1907.

Kind of work done.	Amount received.	
	1924.	1907.
	£'000	£'000
Gold blocking, stamping, lettering and gilding .. .	44	10
Relief and die stamping	38	} 19
Envelope making	11	
Binding and ruling	8	
Punching, perforating, wiring, gumming and other work	17	
TOTAL	118	29

Value of output free from duplication.—The gross value of the output of the firms that made their returns on schedules for the Manufactured Stationery Trades was £10,362,000 in 1924. The amount included in that total as received for work done for the trade was £118,000, but a substantial part of this total probably represented work done for merchants or for firms that made returns on schedules for other trades. Manufacturing stationers stated that they paid £94,000 to other firms for work given out to them, but probably a part of that sum was paid to printers and bookbinders who

made their returns on schedules for the Printing and Bookbinding Trades. There does not appear to be any duplication in respect of the finished products, and the value of the output, free from duplication, may therefore be estimated at about £10,300,000. The corresponding net figure for 1907 was £4,317,000.

Cost of materials and work given out.—The cost of materials used by firms that made their returns on schedules for the Manufactured Stationery Trades was returned as £4,816,000 in 1924 and is substantially free from duplication; the corresponding figure for 1907 was £2,342,000.

The amount paid to other firms for work given out to them was returned as £94,000 in 1924 and £95,000 in 1907.

Net output.—The net output in 1924 of the firms that made their returns on schedules for the Manufactured Stationery Trades (whose gross output was valued at £10,362,000) was £5,452,000, 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 and the amount paid to other firms for work given out to them.

The net output per head of persons employed (excluding outworkers) in the censal year 1924 was £183 as compared with £75 in 1907.

Exports and imports.—In 1924 manufacturing stationers were required to state the quantity of their output of certain products, but a number of firms were unable to give this information. The particulars so furnished are set out in the following table, together with the exports and net imports.

Kind of output.	Production.		Exports.		Net imports.	
	Quantity.	Value at factory.	Quantity.	Value f.o.b.	Quantity.	Value c.i.f.
	Th.cwts.	£'000	Th.cwts.	£'000	Th.cwts.	£'000
Notepaper and pads* :—						
{ Quantity stated	113·3	344	} 30·7	152	4·2	11
{ Quantity not stated	..	142				
Envelopes* :—						
{ Quantity stated	454·4	1,553	} 43·7	188	12·3	33
{ Quantity not stated	..	557				
Other stationery (boxed, letter files, etc.)	1,869	113·2	890	32·0	177
Paper bags	1,730	3,270	59·1	117	9·2	22
Picture post cards :—	Th. doz.		Th. doz.		Th. doz.	
{ Quantity stated	4,050	119	} 496	14	6,176	93
{ Quantity not stated	..	86				

* Excluding boxed stationery.

It will be seen that, except in picture post cards, British manufacturers held a predominant share in the home market. In 1908, when particulars of exports were first given, 20,300 cwt. of envelopes and 33,300 cwt. of paper bags were exported. Net imports of the classes of goods shown above were not recorded in 1908.

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 Manufactured Stationery Trades 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, 14,500 operatives, or 57 per cent. of the total of 25,413 operatives for the trades as a whole, and their net output totalled £3,237,000, or 59 per cent. of the aggregate net output of £5,452,000 for the trades as a whole. The total wage-bill of these firms, as returned to the Ministry of Labour, was £1,405,000, representing about 43 per cent. of their aggregate net output.

Employment.

The detailed information relating to employment in 1924 is summarised in Table III on pages 346 and 347. The following table sets out certain 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 (excluding outworkers).	Males.		Females.		Males and females.	
	Under 18.	All ages.	Under 18.	All ages.	Under 18.	All ages.
1924.						
Operatives	1,403	8,229	5,220	16,420	6,623	24,649
Administrative, etc. ..	320	2,995	439	2,143	759	5,138
TOTAL	1,723	11,224	5,659	18,563	7,382	29,787
1907.						
Wage earners	1,719	8,098	4,734	14,968	6,453	23,066
Salaried	324	2,446	162	715	486	3,161
TOTAL	2,043	10,544	4,896	15,683	6,939	26,227
Average number of outworkers :—						
1924	30		209		239	
1907	4		180		184	

The numbers of operatives recorded month by month in 1924 ranged from 970 below the average, in January, to 1,247 above the average, in December (see Table IIIB, page 347). The numbers

increased from month to month throughout the year. It will be seen that the preponderance of female operatives was somewhat greater in 1924 than in 1907.

Mechanical Power.

The detailed information relating to mechanical power in 1924 is summarised in Table IV on page 348. 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.
PRIME MOVERS :—	H.P.	H.P.	H.P.	H.P.
Reciprocating steam engines ..	1,381	194	1,575	1,111
Steam turbines	200	—	200	—
Gas engines	1,750	414	2,164	2,400
Petrol and light oil engines ..	5	—	5	
Heavy oil engines	191	167	358	
Water power	100	—	100	109
TOTAL	3,627	775	4,402	3,620
ELECTRIC GENERATORS :—	Kw.	Kw.	Kw.	Kw.
Driven by—				
Reciprocating steam engines	700	50	750	101
Steam turbines	150	—	150	—
Gas engines	309	52	361	263
Petrol and light oil engines ..	—	—	—	
Heavy oil engines	83	88	171	
Water power	8	—	8	—
TOTAL	1,250	190	1,440	364

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

Electric motors.	1924.		
	Ordinarily in use.	In reserve or idle.	Total.
Driven by—	H.P.	H.P.	H.P.
Electricity generated in own works	1,961	118	2,079
Purchased electricity	6,463	849	7,312

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 837,000.

Machinery equipment.

In response to a request for voluntary information as to the kinds and numbers of machines at works at the end of 1924, firms with a gross output of £5,710,000, or 55 per cent. of the gross output of the whole trade, furnished the following particulars.

Kind of machines.	In use.	Idle.	Total.	Proportion idle.
	No.	No.	No.	Per cent.
Type-casting (linotype, monotype, etc.)	24	—	24	—
Letterpress printing—				
Platen	798	94	892	10·5
Cylinder, of quad crown and over	50	—	50	—
Cylinder, under quad crown ..	271	23	294	7·8
Rotary	69	2	71	2·8
TOTAL—Letterpress ..	1,188	119	1,307	9·1
Lithograph printing—				
Flat bed, of quad crown and over	16	6	22	27·3
Flat bed, under quad crown ..	68	7	75	9·3
Rotary, of quad crown and over	7	—	7	—
Rotary, under quad crown ..	20	1	21	4·8
TOTAL—Lithograph ..	111	14	125	11·2
Binding and ruling—				
Cutting	386	14	400	3·5
Folding	114	16	130	12·3
Ruling	130	14	144	9·7
TOTAL—Binding and ruling	630	44	674	6·5

TABLES.

I.—Summary of results.

Particulars.	Unit.	England and Wales and N. Ireland.*	Scotland.	United Kingdom.
Value of goods made and work done (Gross output)	£'000	9,559	803	10,362
Cost of materials used	"	4,438	378	4,816
Paid for work given out to other firms	"	81	13	94
Net output	"	5,040	412	5,452
Average number of persons employed (excluding outworkers) ..	No.	26,960	2,827	29,787
Net output per person employed (excluding outworkers)	£	187	146	183
Mechanical power available:—				
Prime movers	H.P.	3,926	476	4,402
Electric motors driven by purchased electricity	"	6,796	516	7,312

* In order to avoid the possible disclosure of information relating to individual firms, the figures for Northern Ireland have been combined with those for England and Wales.

II.—Production.

Output sold or added to stock and work done.	England and Wales and Northern Ireland.*	Scotland.	United Kingdom.
	Selling value.	Selling value.	Selling value.
	£'000	£'000	£'000
Notepaper and pads (not including boxed stationery)	<i>Weight stated</i> .. 276 <i>(Th. cwts.)</i> 89.3	25 7.3	301 96.6
Envelopes (not including boxed stationery)	<i>Weight not stated</i> .. 77 <i>(Th. cwts.)</i> 1,324	30 229	107 1,553
Manuscript books (including account books, note books, exercise books, etc.)	<i>Weight stated</i> .. 319 <i>(Th. cwts.)</i> †	82 †	401 490
Paper bags	<i>Weight not stated</i> .. † <i>(Th. cwts.)</i> 908	† 39	483 947
Boxes and cartons of paper and cardboard (including folding boxes)	<i>Weight stated</i> .. 383.8 <i>(Th. cwts.)</i> †	20.4 †	404.2 151
Picture post cards	<i>Weight not stated</i> .. † <i>(Th. doz.)</i> †	† †	68 119
Paper, enamelled, stained, marbled, waxed, etc. ..	<i>Quantity stated</i> .. † <i>(Th. doz.)</i> †	† †	4,050 32
Letter files, loose leaf systems and other office systems	198	—	198
Luggage labels	623	—	623
Christmas cards, greeting cards, playing cards, calendars and other similar goods	†	†	207
Manufactured stationery, not elsewhere specified (including compendiums, boxed stationery, etc.) ..	908	98	1,006
Pattern cards	964	68	1,032
Ticket and show card writing and mounting	144	12	156
Picture and photograph mounts	345	23	368
Patterns and transfers	222	—	222
Other articles of paper and cardboard	141	—	141
Stationers' sundries, not of paper or cardboard ..	427	8	435
Other goods made	126	—	126
	322	11	333
Job and general printing:—			
Letterpress	234	19	253
Lithographic	45	—	45
Other	440	7	447
TOTAL—Printing	719	26	745
Work done for the trade:—			
Gold blocking, stamping, lettering and gilding ..	†	†	44§
Relief and die stamping	†	†	38§
Envelope making	†	†	11§
Binding and ruling	8§	—	8§
Punching, perforating, wiring, gumming and other work	†	†	17§
TOTAL VALUE OF GOODS MADE AND WORK DONE (GROSS OUTPUT)	9,559	803	10,362

* See footnote to Table I.

† In order to avoid the possible disclosure of information relating to individual firms, figures are given only for the United Kingdom as a whole.

§ Amount received for work done.

III.—Employment.

A.—NUMBERS EMPLOYED IN WEEK ENDED 18TH OCTOBER, 1924
(EXCLUDING OUTWORKERS).

Kind of staff.	Males.		Females.		Males and females.	
	Under 18.	All ages.	Under 18.	All ages.	Under 18.	All ages.
<i>England and Wales and Northern Ireland</i> †.						
Operatives	1,360	7,914	4,733	15,000	6,093	22,914
Administrative, etc.*	309	2,773	412	1,977	721	4,750
TOTAL	1,669	10,687	5,145	16,977	6,814	27,664
<i>Scotland</i> :—						
Operatives	76	518	666	1,981	742	2,499
Administrative, etc.*	11	222	27	166	38	388
TOTAL	87	740	693	2,147	780	2,887
<i>United Kingdom</i> :—						
Operatives	1,436	8,432	5,399	16,981	6,835	25,413
Administrative, etc.*	320	2,995	439	2,143	759	5,138
TOTAL	1,756	11,427	5,838	19,124	7,594	30,551

* Administrative, technical and clerical staff.

† See footnote to Table I.

B.—OPERATIVES EMPLOYED IN ONE WEEK IN EACH MONTH OF 1924.
(EXCLUDING OUTWORKERS).*England and Wales and Northern Ireland.* (Annual average : Males, 7,697 ; Females, 14,513 ; Total, 22,210.)*

Week ended.	Males.	Females.	Total.	Week ended.	Males.	Females.	Total.
Jan., 12th ..	7,509	13,907	21,416	July 19th ..	7,566	14,407	21,973
Feb. 16th ..	7,562	13,956	21,518	Aug. 16th ..	7,651	14,390	22,041
Mar. 15th ..	7,590	14,155	21,745	Sept. 13th ..	7,741	14,738	22,479
April 12th ..	7,603	14,259	21,862	Oct. 18th ..	7,914	15,000	22,914
May 17th ..	7,592	14,367	21,959	Nov. 15th ..	8,004	15,288	23,292
June 21st ..	7,597	14,373	21,970	Dec. 13th ..	8,037	15,312	23,349

Scotland. (Annual average : Males, 532 ; Females, 1,907 ; Total, 2,439.)

Jan. 12th ..	537	1,726	2,263	July 19th ..	536	1,990	2,526
Feb. 16th ..	519	1,794	2,313	Aug. 16th ..	534	1,988	2,522
Mar. 15th ..	528	1,842	2,370	Sept. 13th ..	531	1,968	2,499
April 12th ..	529	1,838	2,367	Oct. 18th ..	518	1,981	2,499
May 17th ..	534	1,868	2,402	Nov. 15th ..	532	2,008	2,540
June 21st ..	534	1,889	2,423	Dec. 13th ..	550	1,997	2,547

United Kingdom. (Annual average : Males, 8,229 ; Females, 16,420 ; Total, 24,649.)

Jan. 12th ..	8,046	15,633	23,679	July 19th ..	8,102	16,397	24,499
Feb. 16th ..	8,081	15,750	23,831	Aug. 16th ..	8,185	16,378	24,563
Mar. 15th ..	8,118	15,997	24,115	Sept. 13th ..	8,272	16,706	24,978
April 12th ..	8,132	16,097	24,229	Oct. 18th ..	8,432	16,981	25,413
May 17th ..	8,126	16,235	24,361	Nov. 15th ..	8,536	17,296	25,832
June 21st ..	8,131	16,262	24,393	Dec. 13th ..	8,587	17,309	25,896

* See footnote to Table I.

C.—NUMBER OF OUTWORKERS AT TWO SPECIFIED PERIODS IN 1924.

Country.	January.			July.		
	Males.	Females.	Total.	Males.	Females.	Total.
<i>Great Britain*</i>	24	203	227	36	215	251

* In order to avoid the possible disclosure of information relating to individual firms the figures for Scotland have been combined with those for England and Wales. No outworkers were returned for Northern Ireland.

IV.—Mechanical Power.

PARTICULARS OF PRIME MOVERS, ELECTRIC GENERATORS AND ELECTRIC MOTORS.

Power equipment.	England and Wales and Northern Ireland.*		Scotland.		United Kingdom.	
	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	1,228	127	153	67	1,381	194
Steam turbines	200	—	—	—	200	—
Gas engines	1,594	314	156	100	1,750	414
Petrol and light oil engines	5	—	—	—	5	—
Heavy oil engines	191	167	—	—	191	167
Water power	100	—	—	—	100	—
TOTAL	3,318	608	309	167	3,627	775
TOTAL OF PRIME MOVERS INSTALLED	3,926		476		4,402	
ELECTRIC GENERATORS :—	Kw.	Kw.	Kw.	Kw.	Kw.	Kw.
Driven by—						
Reciprocating steam engines	700	50	—	—	700	50
Steam turbines	150	—	—	—	150	—
Gas engines	259	22	50	30	309	52
Heavy oil engines	83	88	—	—	83	88
Water power	8	—	—	—	8	—
TOTAL	1,200	160	50	30	1,250	190
TOTAL OF ELECTRIC GENERATORS INSTALLED	1,360		80		1,440	
ELECTRIC MOTORS :—	H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
Driven by—						
Electricity generated in own works	1,961	118	—	—	1,961	118
Purchased electricity	5,951	845	512	4	6,463	849

* See footnote to Table I.