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Business Monitor

Report on the Census of Production

Leather goods

HMSO



A publication of the Government Statistical Service

PA432

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Report on the Census of Production 1978

Leather goods

Presented by the Secretary of State for Industry
to Parliament in pursuance of the Statistics of Trade Act 1947
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PA432 LEATHER GOODS

The information in this report relates to establishments classified to the Leather goods industry, minimum list heading 432 in the Standard Industrial Classification (revised 1968). The activities of the industry include:—

Manufacturing trunks, suitcases, handbags, pocket books, belts, straps, harness, saddlery and other goods (except clothing) of leather or leather substitutes (including plastics and fibreglass).

In interpreting the data in the tables it is essential to bear in mind the notes and definitions which commence on page (iii).

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TABLE 1

PA432

Output and costs, 1974-1978
All United Kingdom establishments classified to the industry (a)

	Unit	1974	1975	1976	1977	1978
Enterprises	Number	723	746	768	765	773
Establishments	"	764	787	810	807	814
Sales of goods produced	£ thousand	78,159	92,203	108,486	121,588	143,035
Receipts for work done and industrial services rendered	"	(b)	(b)	189	(b)	249
Capital goods produced for establishments' own use	"	(b)	-	-	(b)	(b)
Non-industrial services rendered	"	152	224	529	91	91
Goods merchanted or factored	"	10,716	9,730	16,020	17,742	22,125
Total sales and work done (c)	"	89,027	102,158	125,224	139,421	165,499
Increase during the year, work in progress and goods on hand for sale	"	2,240	1,141	2,515	2,757	1,344
Gross output	"	91,267	103,299	127,739	142,178	166,843
Purchases of materials for use in production, and packaging and fuel	"	38,970	41,250	56,893	65,065	73,378
Purchases of goods for merchenting or factoring	"	8,028	7,858	12,933	13,539	16,820
Increase during the year, stocks of materials, stores and fuel	"	932	547	2,491	2,301	2,066
Cost of industrial services received	"	1,218	1,197	1,321	1,673	2,231
Net output	"	43,983	53,540	59,084	64,202	76,479
Total employment (d)	Thousands	19.0	18.4	18.3	17.4	17.0
Net output per head	£	2,313	2,907	3,225	3,691	4,498
Payments for non-industrial services						
Hire of vehicles, plant and machinery	£ thousand	416	787	241	537	555
Rents of industrial and commercial buildings	"	(e)	(e)	331	845	742
Commercial insurance premiums	"	418	706	798	886	1,057
Bank charges	"	100	132	123	148	240
Other non-industrial services	"	3,145	4,016	6,117	7,071	9,471
Licensing of motor vehicles	"	35	33	60	88	68
Rates, excluding water rates	"	534	843	995	1,190	1,210
Gross value added at factor cost	"	39,335	47,023	50,419	53,438	63,136
Gross value added at factor cost per head	£	2,069	2,556	2,752	3,072	3,713

(a) Including estimates for establishments not making satisfactory returns, non-response and establishments not selected for the Census. Satisfactory returns accounted for 61 per cent of employment within the industry.

(b) Included in sales of goods produced.

(c) Details of manufacturers' quarterly sales of principal products are published regularly in Business Monitor PQ432.

(d) Average number employed, including full and part-time employees (see table 7) and working proprietors.

(e) For 1974 and 1975 rents of industrial and commercial buildings were not recorded separately, but included in hire of vehicles, plant and machinery.

TABLE 2

PA432

Capital expenditure, 1974-1978
All United Kingdom establishments classified to the industry (a)(b)

	£ thousand				
	1974	1975	1976	1977	1978
Land and buildings					
New building work	404	121	68	175	1,288
Land and existing buildings					
Acquisitions	336	294	748	245	399
Disposals	-	9	119	9	161
Vehicles					
Acquisitions	501	532	1,015	1,067	1,643
Disposals	145	217	271	425	669
Plant and machinery					
Acquisitions	1,043	878	1,823	1,152	2,007
Disposals	19	63	35	45	208
Total net capital expenditure	2,120	1,536	3,229	2,161	4,300

(a) Including estimates for establishments not making satisfactory returns, non-response and establishments not selected for the Census.

(b) Capital expenditure in respect of manufacturing establishments where production had not commenced before the end of the year, is included.

TABLE 3

Stocks and work in progress, 1974-1978
All United Kingdom establishments classified to the industry (a)

	£ thousand				
	1974	1975	1976	1977	1978
	Increase				Value at end of year
Materials, stores and fuel	932	547	2,491	2,301	2,066
Work in progress	260	456	695	393	755
Goods on hand for sale	1,980	685	1,820	2,364	589
Total	3,172	1,688	5,006	5,058	3,409
					33,576

(a) Including estimates for establishments not making satisfactory returns, non-response and establishments not selected for the Census.

TABLE 4

Analysis of establishments by size, 1978
All United Kingdom establishments classified to the industry (a)

Size group (b)	Estab-lish-ments	Enter-prises (c)	Employment			Wages and salaries (f)			
			Total (d)	Opera-tives	Others (e)	Operatives		Others (e)	
						Total	per head	Total	per head
Number	Number	Number	Number	Number	Number	£ thousand	£	£ thousand	£
1-10	471	464	2,176)						
11-19	156	154	2,246)						
20-49	110	110	3,431)	8,490	1,498	17,368	2,046	5,852	3,907
50-99	42	38	2,837)						
100-199	27	26	3,435	2,771	649	5,692	2,054	2,714	4,182
200-299	4	4	960	857	97	1,824	2,128	352	3,629
300 and over	4	4	1,917	1,618	297	3,670	2,268	1,313	4,421
Total	814	773	17,002	13,736	2,541	28,553	2,079	10,231	4,026

- (a) Including estimates for establishments not making satisfactory returns, non-response and establishments not selected for the Census.
 (b) Average number employed, including full and part-time employees (see table 7) and working proprietors.
 (c) The sum of the figures for the size groups may exceed the total for the industry because some enterprises control establishments in more than one size group.
 (d) Including working proprietors.
 (e) Administrative, technical and clerical employees.

Total sales and work done (g)	Gross output	Net output		Gross value added at factor cost		Net capital expenditure (h)	Total stocks and work in progress at end of year
		Total	per head	Total	per head		
£ thousand	£ thousand	£ thousand	£	£ thousand	£	£ thousand	£ thousand
101,082	101,922	46,859	4,383	(j)	(j)	2,126	19,563
38,126	38,300	17,457	5,082	52,659(j)	3,728(j)	1,449	7,074
7,208	7,248	3,515	3,661	3,076	3,204	279	1,527
19,083	19,373	8,648	4,511	7,401	3,861	444	5,412
165,499	166,843	76,479	4,498	63,136	3,713	4,300	33,576

- (f) The cost of employers' contributions to national insurance, pensions and welfare schemes and the running costs of canteens, is estimated for the industry at £5,074 thousand. The remuneration of outworkers on returns received was £1,290 thousand.
 (g) Sales of goods produced, capital goods manufactured and buildings constructed by establishments for their own use, work done, industrial and non-industrial services rendered and merchant goods.
 (h) New building work plus acquisitions less disposals of land and existing buildings, vehicles and plant and machinery.
 (j) Gross value added data relate to establishments employing 1-199.

TABLE 5

PA432

Regional distribution of employment, net capital expenditure, net output and gross value added at factor cost, 1978
All United Kingdom establishments classified to the industry (a)

Area	Total employment (b)		Net capital expenditure (c)		Net output (d)	Gross value added at factor cost (d)	Gross value added at factor cost returned by establishments with 80 per cent or more of their employment in the region as a proportion of total gross value added at factor cost in the region
	Thousands	per cent of United Kingdom	£ thousand	per cent of United Kingdom	£ thousand	£ thousand	percentage
Standard regions of England							
North	0.8	4.5	39	0.9	2,163	1,623	64.1
Yorkshire and Humberside	1.1	6.6	444	10.3	6,536	4,917	80.5
East Midlands	1.0	5.9	272	6.3	4,288	3,488	25.0
East Anglia	0.5	3.0	23	0.5	1,881	1,569	77.0
South East	5.1	29.8	1,888	43.9	25,803	21,688	48.0
South West	0.5	2.7	101	2.4	2,565	2,205	48.3
West Midlands	3.6	21.0	587	13.6	13,698	11,288	66.9
North West	3.4	19.7	712	16.6	14,906	12,611	69.2
England	15.9	93.2	4,066	94.6	71,840	59,389	/
Wales	0.7	4.1	129	3.0	2,643	2,109	65.6
Scotland	0.3	2.0	85	2.0	1,578	1,310	12.9
Great Britain	16.9	99.3	4,281	99.6	76,062	62,808	/
Northern Ireland	0.1	0.7	20	0.5	417	328	84.2
United Kingdom	17.0	100.0	4,300	100.0	76,479	63,136	/

(a) Including estimates for establishments not making satisfactory returns, non-response and establishments not selected for the Census.

(b) Average number employed, including full and part-time employees (see table 7) and working proprietors.

(c) New building work plus acquisitions less disposals of land and existing buildings, vehicles and plant and machinery.

(d) Where a census return covered addresses in two or more regions, an estimate of the net output attributable to each address was made by assuming that net output was proportionate to employment. An estimate for each region was obtained by aggregating estimates of net output for addresses located in that region. Gross value added at factor cost is treated similarly.

TABLE 6

PA432

Percentage analysis of twelve-month periods covered by returns received from United Kingdom establishments, 1978

Accounting year ended		Percentage of total returns received	Percentage of total number employed
		per cent	per cent
1978	April (a)	2.4	1.9
	May	2.4	1.1
	June	2.4	2.4
	July	4.8	6.1
	August	2.4	1.0
	September	4.8	4.1
	October	2.4	1.7
	November	2.4	1.5
	December	49.6	54.6
1979	January	4.8	1.9
	February	0.8	0.3
	March (b)	20.8	23.3

(a) From 6th April.

(b) Including returns made for twelve-month period ended 1st to 5th April 1979.

TABLE 7

Percentage analysis of employees, by full and part-time employment and sex, 1977(a)

Sex	Full-time	Part-time	All employees
	per cent	per cent	per cent
Male	33	2	35
Female	47	18	65

Source: Department of Employment

(a) The percentages relate to the numbers employed (excluding working proprietors) in the United Kingdom at mid-June, 1977.

TABLE 8

PA432

Operating ratios, 1977-1978
All United Kingdom establishments classified to the industry (a)

	Unit	1977	1978
Gross output per head	£	8,173	9,813
Net output per head	£	3,691	4,498
Gross value added per head	£	3,072	3,713
Gross value added as a percentage of gross output	%	38	38
Ratio of gross output to stocks		4.4	5.0
Wages and salaries as a percentage of gross value added	%	63	61
Ratio of operatives to administrative, technical and clerical employees		5.2	5.4
Wages and salaries per administrative, technical and clerical employee	£	3,422	4,026
Wages and salaries per operative	£	1,735	2,079
Net capital expenditure per head	£	124	253
Net capital expenditure as a percentage of gross value added	%	4	7

(a) Including estimates for establishments not making satisfactory returns, non-response and establishments not selected for the Census.

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Notes

These notes give the main information needed for interpreting the figures in the industry Business Monitors: more detailed information about the census is given in a separate Business Monitor PA 1001 (Introductory Notes) of the Report on the Census of Production, 1978.

GENERAL INFORMATION

Changes made for 1978

The Census for 1978 is in line with similar inquiries being conducted in other member countries of the European Economic Communities.

The census differed from earlier censuses in three respects. Sampling was introduced for establishments employing 20 to 49 and a sample of smaller units was selected. A new question on the leasing of capital assets was included for 1978 only. This will provide register information for use in related inquiries into leasing.

Suppression of information relating to individual undertakings Section 9(5)(b) of the Statistics of Trade Act 1947 states -

"The following provisions shall have effect with respect to any report, summary or other communication to the public of information obtained under the foregoing provisions of this Act - in compiling any such report, summary or communication the competent authority shall so arrange it as to prevent any particulars published therein from being identified as being particulars relating to any individual person or undertaking except with the previous consent in writing of that person or the person carrying on that undertaking, as the case may be; but this provision shall not prevent the disclosure of the total quantity or value of any articles produced, sold or delivered; so, however, that before disclosing any such total the competent authority shall have regard to any representations made to them by any person who alleges that the disclosure thereof would enable particulars relating to him or to an undertaking carried on by him to be deduced from the total disclosed".

If a figure involved disclosure the contributor concerned was sometimes asked to give permission for its publication. In the majority of cases permission was given. When it was refused and where contributors were not approached the figure has been suppressed, either by combining it with other figures, or as in the regional tables, by omitting the figure altogether.

Symbols used

The following symbols are used throughout the PA series of Business Monitors:

.. not available

- nil or less than half the final digit shown

* figures cannot be shown owing to the risk of disclosing information about individual enterprises.

R revised

Rounding of figures

Figures in the tables have, where necessary, been rounded to the nearest final digit. Where figures have been so rounded, the sum of the constituent items may not always agree exactly with the total shown.

Industrial classification

The United Kingdom Standard Industrial Classification (SIC) was first issued in 1948 and was subsequently revised in 1958 and 1968. It exists to promote uniformity and comparability in the official statistics of the United Kingdom. The general principles followed are those of the International Standard Industrial Classification of all Economic Activities of the United Nations Statistical Office but the United Kingdom SIC reflects the organisation and structure of industry and trade as it exists in the United Kingdom. The SIC is a classification by activity and is not a commodity classification. However, an index of all commodity headings for which sales data are provided in the Quarterly Business Monitors, is published in Business Monitor PQ 1000.

Statistical units

The statistical unit for the purpose of the Census is the establishment which is defined in the SIC as the smallest unit which can provide the information normally required for an economic census, for

example, employment, expenses, turnover, capital formation. Usually the principal activities carried on in an establishment fall within a single heading of the classification (eg steel making or sugar refining). Typically the establishment embraces all the activities carried on at a single address eg a mine or a factory, including those which are ancillary to the principal activities. Frequently distinct activities characteristic of different industries are carried on at one address, but normally these are not classified separately and the whole establishment is classified according to the main activity. If, however, the required range of data can be provided for each activity, each is taken to constitute a separate establishment. Sometimes activities which are conducted as a single business are carried on at a number of addresses. Where this is so, businesses are asked to provide the full range of information in respect of each address, whether or not the activities are different. Their activities may, however, be integrated to such an extent that they constitute a single establishment. In the latter case the establishment is defined to cover the combined activities at these addresses (termed local units). Separate figures are obtained of employment and net capital expenditure at each unit in order to compile regional tables. Efforts are made by the Business Statistics Office (BSO) to ensure, by negotiating with respondents, that the return from an establishment does not cover local units in more than one of the countries of the United Kingdom.

Establishments are asked to exclude from their returns particulars relating to any department not engaged in production eg merchanting, transport, warehousing, for which they keep a separate set of accounts. Transfers of goods produced to such departments are treated as sales and respondents are asked to value them as far as possible as if sold to an independent purchaser. Where separate accounts are not kept they are asked to include details of all these activities in their return.

Particulars relating to head offices mainly engaged in the administration of the production units within the scope of the census were included. Where more than one return was made the information in respect of the head office was apportioned among them.

For certain purposes in the annual censuses of production (especially the enterprise analyses of Business Monitor PA 1002) related establishments are combined. An enterprise group is defined as a business consisting of either a single establishment or two or more establishments under common ownership or control. Bringing together establishments into enterprise groups is also necessary for the purpose of ensuring that there will be no disclosure of the activities of any one enterprise group. Information about the relationship of establishments, the changing structure of groups of companies and about common ownership links is obtained from many sources, including the Stock Exchange Year Book, company reports, press reports and information supplied by individual establishments.

THE REGISTER

The register permits a questionnaire to be sent direct to the reporting establishment on which the latter can include information relating to all the manufacturing (or local) units which it comprises. The inquiries provide a major source of information for keeping the register continuously up-to-date and act as a check on its detail and structure. For the establishments on the register making returns to the quarterly inquiries, the industrial classification is derived from an analysis of their sales of commodities and is reviewed annually. Employment data are entered on the register from returns to the annual census of production. In cases where an establishment does not make a return to these inquiries the employment data are based on information provided by the Department of Employment from the annual censuses of employment. New additions to the register are obtained from various sources including the Department of Employment and HM Customs and Excise. The 1973 Finance Act allows the latter to pass lists of businesses registered for VAT to the BSO. Where necessary details are sought directly from new businesses. Units which cease to trade are removed from the live register.

Coverage

In recent censuses returns have been required from all establishments employing 20 or more. For the 1978 Census in 68 selected manufacturing industries coverage of establishments in the 20 to 49 employment size band has been reduced to a 1 in 2 sample. This change has relieved some 5,800 firms of the need to complete a census return. The Census has included for the first time a small sample (around 10 per cent) of units employing 11 to 19 to meet an EEC requirement to collect a limited range of data from smaller units every 5 years.

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