

THE SADDLERY, HARNESS, TRAVELLING BAGS, AND
LEATHER GOODS TRADES.

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Introductory.*

The tables on pages 227 to 231 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 saddlery, harness, leather trunks, travelling bags, and other leather goods. The number of such separate returns was 2,215. About 500 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 1,000 persons in all and that their total net output probably did not exceed £140,000.

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 obtained in connexion

* See also the Notes on pages vii to xv.

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.	Unit.	1924.	1907.
Value of goods made and work done (Gross output)	£'000	6,708	3,504
Cost of materials used	"	3,545	1,883
Paid for work given out to other firms	"	20	20
Net output	"	3,143	1,601
Average number of persons employed (excluding outworkers)	No.	21,628	22,548
Net output per person employed (excluding outworkers)	£	145	71
Mechanical power available:—			
Prime movers	H.P.	2,254	2,176
Electric motors driven by purchased electricity	"	3,058	(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. Separate particulars for the Saddlery, Harness, etc., Trades were not published in connexion with the Census of Production taken by the Government of the Irish Free State for the year 1926. In 1907 the Saddlery, Harness and Cart Gear Trades employed 504 persons in the whole of Ireland, with a gross output valued at £53,000. Separate particulars for the Travelling Bag and Fancy Leather Goods Trades were not published for Ireland in that year. It would, however, appear that the exclusion of Southern Ireland from the results for 1924 does not seriously affect the comparison.

Value of output and cost of materials.—The figures in the above table representing the value of goods made and work done and the cost of materials used 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 probably over-state the value of the output of, and the cost of materials used by, the Saddlery, Harness, Travelling Bags and Leather Goods Trades considered as a whole. The matter is discussed on page 223, where it is estimated that the value, free from duplication, of the output of the Saddlery, Harness, Travelling Bags and Leather Goods Trades in 1924 lay between £6,314,000 and £6,464,000, and the cost of the materials purchased from sources outside the trade and worked up into its products, lay between £3,171,000 and £3,321,000.

Production.

Detailed information relating to the output of the Saddlery, Harness, Travelling Bags and Leather Goods Trades in 1924 will be found in Table II on page 228.

In addition to the output dealt with in this report, saddlery and harness valued, on a cost basis, at £49,000 were made in 1924 by Railway Companies and Local Authorities.* The corresponding figure for 1907 was £32,000.

Principal products.—The following table shows for the years 1924 and 1907 the value of the principal classes of output returned, the aggregate figures for each year being inclusive of the output of similar products recorded on schedules for other trades, but exclusive of the output of Railway Companies and Local Authorities.

Kind of goods made.	1924.		1907.
	Returned on schedules for		Total.
	The Saddlery and Leather Goods Trades.	All trades.	
	Selling value.	Selling value.	Selling value.
	£'000.	£'000.	£'000.
†Saddlery and harness	515	516	1,099
Horse clothing	73	80	115
Whips	29	29	70
Saddlery hardware, harness furniture and cart gear	512	566	492
Saddle-trees	20	20	36
Trunks, travelling bags and cases:—			
Travelling bags and other light leather goods, exclusive of the value of fittings for dressing cases	1,082	1,111	438
Portmanteaux, trunks, sample cases and other heavy leather goods	237	245	
Travelling bags, trunks and cases of materials other than leather	824	828	181
TOTAL—TRUNKS, TRAVELLING BAGS AND CASES	2,143	2,184	619
Parts of trunks, travelling bags, etc.	54	54	19
Leather straps, belts, braces, dog collars, etc.	446	510	140
Fancy leather goods (hand bags, purses, pocket books, etc.):—			
Of leather	1,854	2,343	465
Of artificial leather	57	116	
Leather sports goods	115	231	295
Other leather goods	146	164	
TOTAL VALUE—PRINCIPAL PRODUCTS	5,964	6,813	3,350

† Including some repair work.

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

Some manufacturers of saddlery and harness were not able to state the value of the goods made by them separately from the amount received for repair work, and in such cases combined statements covering both classes of work were accepted.

The value of saddlery and harness made in 1924—£516,000—was only about 47 per cent. of the value returned in 1907, and considering the increase in the price of leather in the interval, the volume of output must have been much less. The main cause was presumably the development of mechanical traction.

The value returned for saddlery hardware, harness furniture and cart gear increased from £492,000 in 1907, to £566,000 in 1924, but, when the increase in the cost of iron, steel, brass, etc., is taken into account, there must have been a falling off in volume, though apparently not so great as in the case of complete saddlery and harness. This section of the trade is very largely self-contained, for in 1924 firms whose main output was saddlery hardware, etc., manufactured such goods to the value of £495,000 or nearly 87·7 per cent. of the total. Their total output of all goods was valued at £549,000, the cost of materials at £216,000, and the amount paid for work given out to other firms at £1,000. They employed 2,513 persons and had installed prime movers of 1,697 horse-power and motors driven by purchased electricity of 727 horse-power.

There were notable increases in value in certain other classes of products, the output of leather trunks, bags, and cases in 1924 being more than treble the value returned in 1907, that of trunks, bags, and cases of other materials over 4½ times the 1907 value, and that of fancy leather goods over five times.

Other products.—In addition to the products set out in the preceding table, firms that made their returns on schedules for the Saddlery, Harness, Travelling Bags and Leather Goods Trades, returned an output of other goods in 1924 valued at £69,000. 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 £50,000.

Repairs and work done for the trade.—In addition to the manufactured goods covered by the preceding paragraphs, firms that made their returns on schedules for the Saddlery, Harness, Travelling Bags and Leather Goods Trades stated that they received the sum of £645,000 in respect of repair work and the sum of £30,000 in respect of work done for the trade in 1924. The corresponding figures for 1907 were £353,000 and £9,000 respectively.

As already noted, the value shewn for finished saddlery and harness is inclusive of the amount received for repairs where manufacturers' records did not enable them to separate the two items. The figures shewn for repair work are defective to this extent and also in so far as such work was carried out by small establishments from which returns were not received.

Value of output free from duplication.—Taking together the total value of manufactured goods (£6,033,000) and the total amount received for repairs and other work done (£675,000), the gross value of the output of these trades in 1924 amounted to £6,708,000. This sum is inclusive of the value of saddlery hardware, saddletrees, and parts of cases and bags, which may have been sold to manufacturers of finished goods using these products as material. Examination of the returns suggests that the range of possible duplication in regard to saddlery hardware and saddletrees was between £170,000 and £320,000, while the whole of the output (£54,000) of "Parts of trunks, travelling bags, etc.", may be taken to be duplicated in that of finished goods.

The total amount returned as received for work done for the trade was £30,000, and the value of work given out to other firms was £20,000. The difference of £10,000 represents the minimum amount received in respect of work done on behalf of firms who did not make returns to the Census office, and is accordingly additional to the total value of the output of the trade. Making allowance for these items, the total value, free from duplication, of the goods produced by these trades, including repairs, in the year 1924 may be estimated approximately as lying between £6,314,000 and £6,464,000.

The corresponding value for 1907 was estimated to lie between £3,052,000 and £3,371,000, both sums being inclusive of repair work.

Cost of materials and work given out.—The cost of materials used by firms that made their returns on schedules for the Saddlery, Harness, Travelling Bags and Leather Goods Trades was returned as £3,545,000 in 1924, a sum which, by the exclusion of purchases of the products of other firms in the trade, is reduced to between £3,171,000 and £3,321,000; the corresponding net figure for 1907 was estimated to lie between £1,428,000 and £1,747,000.

The amount paid to other firms for work given out to them was returned as £20,000 in 1924, and £20,000 in 1907.

Net output.—The net output in 1924 of the firms that made their returns on schedules for the Saddlery, Harness, Travelling Bags and Leather Goods Trades (whose gross output was valued at £6,708,000) was £3,143,000, 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 £145 as compared with £71 in 1907.

Exports and imports.—The following table shows for the year 1924 the exports and net imports of the leading classes of goods in comparison with the production of similarly described goods.

Kind of goods.	Production.	Exports.	Net Imports.
	Value at factory.	Value f.o.b.	Value c.i.f.
	£'000.	£'000.	£'000.
Saddlery and harness	516	268	6
Trunks, bags, etc., of leather ..	1,356	210	8
Fancy leather goods	2,343	394	217
Fancy goods of artificial leather ..	116	11	391
Leather sports goods	231	70	2
Other leather manufactures, except apparel and belting	728	259	102

After allowing for the different bases of values, nearly half the saddlery and harness made in the United Kingdom, about an eighth of the leather trunks, etc., over a seventh of the fancy leather goods and over a fourth of the leather sports goods made were exported in 1924. Net imports were only important in fancy goods and in the case of goods of artificial leather they much exceeded the British production.

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 Saddlery, Harness, Travelling Bags and Leather Goods 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, 8,701 operatives, or 47 per cent. of the total of 18,671 operatives for the trades as a whole, and their net output totalled £1,447,000, or 46 per cent. of the aggregate net output of £3,143,000 for the trades as a whole. The total wage-bill of these firms, as returned to the Ministry of Labour, was £762,000, representing about 53 per cent. of their aggregate net output.

Employment.

The detailed information relating to employment in 1924 is summarised in Table III on pages 229 and 230. 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	1,485	9,015	2,861	9,175	4,346	18,190
Administrative, etc.	89	2,662	126	776	215	3,438
TOTAL	1,574	11,677	2,987	9,951	4,561	21,628
1907.						
Wage earners	2,169	12,864	1,877	6,114	4,046	18,978
Salaried	203	3,160	99	410	302	3,570
TOTAL	2,372	16,024	1,976	6,524	4,348	22,548
Average number of outworkers :—						
1924	32		75		107	
1907	99		175		274	

The numbers of operatives recorded month by month in 1924 ranged from 789 below the average, in January, to 672 above the average, in November (see Table IIIB, page 230). Apart from a pause in the summer, the numbers employed increased steadily from January to November. The number of females was greater in November than in January by 1,129, or 13 per cent., and the number of males by 332, or under 4 per cent. Between the two censal years the female operatives had increased in number by 50 per cent., while the male operatives had decreased by 30 per cent.

Mechanical Power.

The detailed information relating to mechanical power in 1924 is summarised in Table IV on page 231. 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 ..	535	—	535	477
Gas engines	1,565	83	1,648	1,699
Petrol and light oil engines ..	24	7	31	
Heavy oil engines	40	—	40	
TOTAL	2,164	90	2,254	2,176
ELECTRIC GENERATORS :—	Kw.	Kw.	Kw.	Kw.
Driven by—				
Reciprocating steam engines ..	300	—	300	98
Gas engines	275	—	275	250
Petrol and light oil engines ..	—	—	—	
Heavy oil engines	—	—	—	
TOTAL	575	—	557	348

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	587	—	587
Purchased electricity	2,712	346	3,058

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 113,000.

TABLES.

I.—Summary of results.

Particulars.	Unit.	England and Wales.	Scotland.	Great Britain.	Northern Ireland.
Value of goods made and work done (Gross output)	£'000	6,414	269	6,683	25
Cost of materials used	"	3,396	134	3,530	15
Paid for work given out to other firms	"	20	—	20	—
Net output	"	2,998	135	3,133	10
Average number of persons employed (excluding outworkers)	No.	20,596	914	21,510	118
Net output per person employed (excluding outworkers) ..	£	145	148	146	85
Mechanical power available :—					
Prime movers	H.P.	2,231	23	2,254	—
Electric motors driven by purchased electricity	"	2,896	145	3,041	17

II.—Production.

Goods sold or added to stock and work done.	England and Wales and N. Ireland.*	Scotland.	United Kingdom.
	Selling value.	Selling value.	Selling value.
	£'000.	£'000.	£'000.
*Saddlery and harness	481	34	515
Horse clothing	72	1	73
Whips	29	—	29
*Saddlery hardware, harness furniture and cart gear	†	†	512
Saddletrees	†	†	20
Trunks, travelling bags and cases :—			
*Travelling bags, dressing cases (exclusive of the value of fittings) and other light leather goods	1,042	40	1,082
Portmanteaux, trunks, sample cases and other heavy leather goods	233	4	237
*Travelling bags, trunks and cases of materials other than leather	798	26	824
TOTAL—TRUNKS, TRAVELLING BAGS, ETC.	2,073	70	2,143
Parts of trunks, travelling bags, etc	54	—	54
Leather straps, belts, braces, dog collars, etc.	443	3	446
Fancy leather goods (ladies' bags, purses, pocket books, etc.) :—			
Of leather	†	†	1,854
Of artificial leather	57	—	57
Leather sports goods	†	†	115
Other leather goods	140	6	146
Other goods made	62	7	69
TOTAL VALUE OF GOODS MADE	5,851	182	6,033
	Amount received.	Amount received.	Amount received.
*Repair work	560	85	645
Work done for the trade	28	2	30
TOTAL VALUE OF WORK DONE	588	87	675
TOTAL VALUE OF GOODS MADE AND WORK DONE (GROSS OUTPUT)	6,439	269	6,708

* The small output for Northern Ireland has, for convenience, been included with that for England and Wales, the items affected being marked thus (*). The total value of such output was £25,000 of which £4,000 was in respect of saddlery and harness and £8,000 in respect of repair work; the three remaining items cannot be stated separately on account of the possibility of disclosure of information relating to individual firms.

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

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 :—</i>						
Operatives	1,433	8,464	2,943	9,449	4,376	17,913
Administrative, etc.*	86	2,448	122	744	208	3,192
TOTAL	1,519	10,912	3,065	10,193	4,584	21,105
<i>Scotland :—</i>						
Operatives	46	493	57	184	103	677
Administrative, etc.*	3	178	4	28	7	206
TOTAL	49	671	61	212	110	883
<i>Great Britain :—</i>						
Operatives	1,479	8,957	3,000	9,633	4,479	18,590
Administrative, etc.*	89	2,626	126	772	215	3,398
TOTAL	1,568	11,583	3,126	10,405	4,694	21,988
<i>Northern Ireland :—</i>						
Operatives	8	62	9	19	17	81
Administrative, etc.	—	36	—	4	—	40
TOTAL	8	98	9	23	17	121
<i>United Kingdom :—</i>						
TOTAL	1,576	11,681	3,135	10,428	4,711	22,109

* Administrative, technical and clerical staff.

B.—OPERATIVES EMPLOYED IN ONE WEEK IN EACH MONTH OF 1924
(EXCLUDING OUTWORKERS).

England and Wales. (Annual average : Males, 8,454 ; Females, 8,950 ; Total, 17,404).

Week ended.	Males.	Females.	Total.	Week ended.	Males.	Females.	Total.
Jan. 12th ..	8,196	8,442	16,638	July 19th ..	8,567	8,895	17,462
Feb. 16th ..	8,248	8,490	16,738	Aug. 16th ..	8,547	8,884	17,431
March 15th ..	8,354	8,559	16,913	Sept. 13th ..	8,458	9,232	17,690
April 12th ..	8,414	8,671	17,085	Oct. 18th ..	8,464	9,449	17,913
May 17th ..	8,572	8,862	17,434	Nov. 15th ..	8,518	9,571	18,089
June 21st ..	8,597	8,811	17,408	Dec. 13th ..	8,509	9,533	18,042

Scotland. (Annual average : Males, 500 ; Females, 208 ; Total, 708).

Jan. 12th ..	488	200	688	July 19th ..	506	219	725
Feb. 16th ..	493	203	696	Aug. 16th ..	504	218	722
March 15th ..	502	214	716	Sept. 13th ..	501	206	707
April 12th ..	504	214	718	Oct. 18th ..	493	184	677
May 17th ..	509	221	730	Nov. 15th ..	494	198	692
June 21st ..	513	220	733	Dec. 13th ..	492	199	691

Great Britain. (Annual average : Males, 8,954 ; Females, 9,158 ; Total, 18,112).

Jan. 12th ..	8,684	8,642	17,326	July 19th ..	9,073	9,114	18,187
Feb. 16th ..	8,741	8,693	17,434	Aug. 16th ..	9,051	9,102	18,153
March 15th ..	8,856	8,773	17,629	Sept. 13th ..	8,959	9,438	18,397
April 12th ..	8,918	8,885	17,803	Oct. 18th ..	8,957	9,633	18,590
May 17th ..	9,081	9,083	18,164	Nov. 15th ..	9,012	9,769	18,781
June 21st ..	9,110	9,031	18,141	Dec. 13th ..	9,001	9,732	18,733

Northern Ireland. (Annual average : Males, 61 ; Females 17 ; Total, 78).

Jan. 12th ..	59	16	75	July 19th ..	61	16	77
Feb. 16th ..	58	17	75	Aug. 16th ..	60	18	78
March 15th ..	59	17	76	Sept. 13th ..	63	19	82
April 12th ..	61	18	79	Oct. 18th ..	62	19	81
May 17th ..	61	19	80	Nov. 15th ..	63	18	81
June 21st ..	60	18	78	Dec. 13th ..	61	18	79

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

Country.*	January.			July.		
	Males.	Females.	Total.	Males	Females.	Total.
England and Wales ..	27	75	102	27	71	98
Scotland	5	2	7	4	2	6
Great Britain	32	77	109	31	73	104

* No outworkers were recorded for Northern Ireland.

IV.—Mechanical Power.

PARTICULARS OF PRIME MOVERS, ELECTRIC GENERATORS AND
ELECTRIC MOTORS.

Power equipment.	England and Wales.		Scotland.		United Kingdom.*	
	Ordinarily in use.	In reserve or idle.	Ordinarily in use.	In reserve or idle.	Ordinarily in use.	In reserve or idle.
	H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
PRIME MOVERS :—						
Reciprocating steam engines	535	—	—	—	535	—
Gas engines	1,542	83	23	—	1,565	83
Petrol and light oil engines	24	7	—	—	24	7
Heavy oil engines ..	40	—	—	—	40	—
TOTAL	2,141	90	23	—	2,164	90
TOTAL OF PRIME MOVERS INSTALLED	2,231		23		2,254	
	Kw.	Kw.	Kw.	Kw.	Kw.	Kw.
ELECTRIC GENERATORS :—						
Driven by—						
Reciprocating steam engines	300	—	—	—	300	—
Gas engines	275	—	—	—	275	—
TOTAL	575	—	—	—	575	—
TOTAL OF ELECTRIC GENERATORS INSTALLED	575		—		575	
	H.P.	H.P.	H.P.	H.P.	H.P.	H.P.
ELECTRIC MOTORS :—						
Driven by—						
Electricity generated in own works ..	587	—	—	—	587	—
Purchased electricity	2,570	326	125	20	2,712*	346

* The only mechanical power recorded for Northern Ireland consisted of electric motors of 17 H.P. capacity, driven by purchased electricity.