

121 Hats, caps and millinery

This Report on the Hats, Caps and Millinery Industry relates to establishments engaged wholly or mainly in manufacturing wool felt, fur felt and imitation fur hats, hoods and capelines, and all sorts of headgear (except fur hats) for adults and children, but not those made up from knitted fabric by establishments classified to the Hosiery and Other Knitted Goods Industry (Part 104). Made-up linings etc, for headgear are also included but workrooms attached to retail shops are excluded.

This industry corresponds to minimum list heading 446 in the Standard Industrial Classification (Revised 1968) which has been used for the first time as a basis of classification in the 1968 Census. The definition of this industry however is unchanged from the last detailed Census of Production for 1963 in which it was reported (Part 98).

In this industry, where small establishments account for a relatively large proportion of employment and output, establishments employing fewer than twenty-five persons were asked to complete a simplified version of the full census form.

In interpreting the data in the tables it is essential to bear in mind the notes and definitions which appear on pages (i) to (iv).

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TABLE 1 Industry summary, 1963 and 1968
United Kingdom

	Unit	All establishments (a)		Small establishments (b)		
		1963	1968	1963	1968	
Number of enterprises	No.	361	239	262	178	
Number of establishments	"	382	261	263	182	
Gross output	£'000	21,754	19,241	5,108	5,197	
Net output	"	10,353	9,361	2,245	2,287	
Net output per head	£	795	1,055	835	1,090	
Sales and work done	{ goods produced and work done (c)	£'000	20,628	17,931	5,036	4,790
	{ merchanted goods and canteen takings	"	1,049	1,341	66	434
Purchases	{ materials for use in production and packaging and fuel	"	9,830	8,262	2,710	2,391
	{ goods for merchanding and canteen purchases	"	1,034	1,098			356
Payments to other organisations	{ for work done on materials given out for transport	"	273	269	105	105
	{ by road	"	198	90	49	30
	{ by rail and other means excluding postal services	"		155		28
Stocks and work in progress						
Total stocks and work in progress	{ change during year	"	+ 10	- 38	+ 6	- 28
	{ at end of year	"	3,313	2,994	402	422
Goods on hand for sale	{ change during year	"	+ 52	- 15	+ 9	- 8
	{ at end of year	"	511	715	65	163
Work in progress	{ change during year	"	+ 24	- 16	- 3	- 19
	{ at end of year	"	776	640	46	46
Materials, stores and fuel	{ change during year	"	- 66	- 7	-	- 1
	{ at end of year	"	2,026	1,639	290	213
Number employed on average during the year	{ total, including working proprietors	Th.	13.0	8.9	2.7	2.1
	{ operatives	"	10.8	7.3	2.0	1.7
	{ other employees (d)	"	1.8	1.3	0.3	0.2
Wages and salaries	{ of operatives	£'000	4,789	4,337	878	910
	{ of other employees (d)	"	1,576	1,360	288	200
Capital expenditure (e)						
Total	"	334	233	57	69	
New building work	"	132	25	5	5	
Land and existing buildings (f)	"	2	34	3	37	
Plant and machinery (f)	"	108	108	11	9	
Vehicles (f)	"	92	66	37	17	

(a) For 1968 estimates are based on returns covering 85 per cent. of the employment shown. For 1963 the comparable figure was 88 per cent.

(b) For 1968 estimates are based on returns covering 61 per cent. of the employment shown. For 1963 the comparable figure was 64 per cent.

(c) Including services rendered to other organisations (amounts charged for hiring out plant, machinery or other goods, for providing transport, or for technical or other services rendered).

(d) Administrative, technical and clerical employees.

(e) Excluding expenditure for establishments not yet in production.

(f) Acquisitions less disposals.

TABLE 2 Analysis by size of establishment within the industry, 1968

(i) Output and employment

All establishments: United Kingdom

Number employed on average during the year by the establishment (a)	Estab-lish-ments (b)	Enter-prises (b)	Total number employed on average during the year (a)	Gross output	Net output	Net output per head
	Number	Number	Number	£'000	£'000	£
1-5	47	47	147	5,197(c)	2,287(c)	1,090(c)
6-10	43	43	350			
11-24	92	89	1,601			
25-49	31	28	1,068	2,298	1,121	1,050
50-99	23	22	1,601	3,704	1,713	1,070
100-199	10	10	1,399	2,792	1,488	1,064
200 and over	6	5	2,208	4,218	2,234	1,012
Unsatisfactory returns	9	9	497	1,031(d)	519(d)	1,044(d)
Total	261	239	8,871	19,241	9,361	1,055

(ii) Employees, wages and salaries

All establishments: United Kingdom

Number employed on average during the year by the establishment (a)	Employees		Wages and salaries		Wages and salaries per head	
	Oper-atives	Others (e)	Oper-atives	Others (e)	Oper-atives	Others (e)
	Number	Number	£'000	£'000	£	£
1-5	1,651(c)	237(c)	910(c)	200(c)	551(c)	844(c)
6-10						
11-24						
25-49	913	111	572	115	627	1,032
50-99	1,353	215	799	251	591	1,168
100-199	1,211	184	747	251	617	1,365
200 and over	1,720	485	1,056	458	614	944
Unsatisfactory returns	412(d)	79(d)	252(d)	85(d)	611(d)	1,078(d)
Total	7,260	1,311	4,337	1,360	597	1,037

(a) Including working proprietors.

(b) The sum of the figures for the size groups exceeds the total for the industry to the extent that enterprises made returns for establishments in more than one size group.

(c) Estimates for all small establishments based upon returns received.

(d) Estimates for unsatisfactory returns in respect of larger establishments based on returns received.

(e) Administrative, technical and clerical employees.

TABLE 3 Percentage analysis of employees, by age and sex, 1969 (a)

All establishments: United Kingdom

Ages	Males	Females	All employees
	Per cent.	Per cent.	Per cent.
Under 18	2	3	5
18 and over	30	65	95
All ages	32	68	100

Source: Department of Employment

(a) The percentages relate to the numbers employed (excluding working proprietors) at June 1969, the earliest date for which the information is available on the basis of the Standard Industrial Classification, (Revised 1968).

Footnotes to Table 4.

- (a) Some establishments employing fewer than 25 persons were included in returns for larger establishments. These amounted to 10 establishments in 1968 and 8 in 1963.
- (b) The method of classifying returns to sub-divisions of the industry is explained in the notes; the characteristic products of each sub-division are identified in Table 5(ii).
- (c) The sum of the figures for the sub-divisions exceeds the total for the industry to the extent that enterprises made returns for more than one sub-division.
- (d) Including services rendered to other organisations (amounts charged for hiring out plant, machinery or other goods, for providing transport, or for technical or other services rendered).
- (e) Direct sales of goods (excluding canteen takings) made to, and work done for, the general public by larger establishments are included. These amounted to £3,000 in 1968. Similar information is not available for 1963.
- (f) Characteristic products relate only to sub-divisions of the industry.
- (g) For sub-divisions of the industry, this is the ratio of sales of characteristic products to total sales of goods produced and work done. For the industry as a whole, this is the ratio of total sales of principal products by the industry to total sales of goods produced and work done.
- (h) Administrative, technical and clerical employees.
- (i) Excluding expenditure for establishments not yet in production.

TABLE 4 Analysis of larger establishments, 1963 and 1968
Establishments employing 25 or more persons: Analysis of returns received, United Kingdom (a)

	Unit	Sub-divisions of the industry (b)				Total	
		Felt hats 10		Other 20		1963	1968
		1963	1968	1963	1968		
Number of enterprises (c)	No.	33	18	63	45	96	62
Number of establishments	"	37	20	77	60	114	80
Gross output	£'000	7,086	4,971	8,811	8,327	15,897	13,298
Net output	"	3,650	2,550	4,086	4,140	7,736	6,690
Net output per head	£	735	875	836	1,184	785	1,044
Sales and work done	£'000	goods produced and work done (d) (e)		merchanted goods and canteen takings		14,898	12,438
		6,710	4,761	8,189	7,677		
Sales of characteristic products	"	5,823	3,398	6,743	6,428	(f)	(f)
Index of specialisation (g)	Per cent.	87	71	82	84	97	99
Purchases	£'000	materials for use in production and packaging and fuel		goods for merchandising and canteen purchases		7,052	5,561
		3,040	2,013	4,012	3,548		
Payments to other organisations	"	for work done on materials given out for transport		by road		162	157
				by rail and other means excluding postal services			
		46		97				143
Stocks and work in progress	"	change during year		at end of year		41	7
		+ 28	- 39	+ 13	+ 31		
Work in progress	"	change during year		at end of year		692	554
		+ 20	- 28	+ 5	+ 29		
Materials, stores and fuel	"	change during year		at end of year		1,651	1,335
		- 51	- 12	- 11	+ 7		
Number employed on average during the year	No.	total, including working proprietors		operatives		9,853	6,410
		4,965		2,914			
		722		536			
Wages and salaries	£'000	of operatives		of other employees (h)		3,727	1,093
		1,892	1,352	1,835	1,895		
Wages and salaries per head	£	operatives		other employees (h)		888	1,078
		447	572	438	643		
Capital expenditure (i)	£'000	19	3	101	16	120	19
Land and existing buildings	"	acquisitions		disposals		2	1
		-		-			
Plant and machinery	"	acquisitions		disposals		98	4
		64	55	34	42		
Vehicles	"	acquisitions		disposals		86	76
		32	25	54	51		
		12	13	21	18	32	30

For notes to this table - see page 121/5.

TABLE 5(i) Estimates of total sales of principal products of the industry, 1963 and 1968 (a)

All establishments: United Kingdom

	All establishments (b)		Small establishments in the industry (c)			
	1963	1968	1963	1968		
	£'000	£'000	£'000	£'000		
Hoods, capelines of wool and fur felt and shapes, untrimmed	2,589	1,757	133	152		
Hats and millinery, trimmed (except hats of imitation fur and fur hats and knitted berets) (d)	13,564	7,304	4,062	2,315		
Men's					2,645	173
Women's					342	104
Children's						
Hats of imitation fur (men's, women's and children's)	(e)	1,037	(e)	255		
Caps, including riding and uniform caps, and helmets of all descriptions	3,544	3,808	299	604		
Other hatters' and milliners' wares, trimmings, etc. (except hatters' fur)	286	721	123	530		
Other products (f)	211	332	125	220		
Work done	296	344	139	174		
Total	20,491	18,291	4,881	4,527		

(a) Including estimates for establishments not making satisfactory returns.

(b) Including sales of principal products of the industry by larger establishments, but not by small establishments classified to other industries. For a detailed analysis of sales by larger establishments see Table 5(ii).

(c) Excluding small establishments included on returns made by larger establishments.

(d) For 1963, hats of imitation fur were not specifically excluded.

(e) Not recorded separately for 1963.

(f) Including any sales by small establishments of goods other than principal products of the industry but excluding merchanted goods, canteen takings and the value of services rendered to other organisations.

TABLE 5(ii) Sales of principal products of the industry by larger establishments, including sales by establishments classified to other industries, 1963 and 1968 (a)

Establishments employing 25 or more persons:
Analysis of returns received, United Kingdom

Industry sub-division (b)	1963		1968			
	Quantity	Value	Quantity	Value	Enter-prises	Entries
	Thousands	£'000	Thousands	£'000	Number	Number
Hoods and capelines						
10 Of wool felt	1,956	525	856	218	5	5
10 Of fur felt	2,355	1,405	1,006	779	*	*
20 Shapes, untrimmed	{ 742 .. }	{ 261 133 }	{ 944 }	{ 493 }	{ 5 }	{ 5 }
Hats and millinery, trimmed (except hats of imitation fur and fur hats and knitted berets) (c)						
Men's						
10 Of wool felt	1,046	607	673	456	8	8
10 Of fur felt	{ 1,146 .. }	{ 1,435 407 }	{ 868 }	{ 1,086 }	{ 7 }	{ 8 }
20 Of cloth	{ 312 }	{ 263 }	{ 551 }	{ 604 }	{ 13 }	{ 14 }
20 Of other materials	{ .. }	{ .. }	{ 88 .. }	{ 58 93 }	{ 7 }	{ 7 }
Women's						
10 Of wool felt	{ 892 .. }	{ 506 117 }	{ 658 }	{ 518 }	{ 15 }	{ 16 }
10 Of fur felt	{ 1,184 .. }	{ 1,075 266 }	{ 709 .. }	{ 1,095 209 }	{ 27 }	{ 28 }
20 Of cloth	{ 1,659 }	{ 1,136 }	{ 954 .. }	{ 960 120 }	{ 17 }	{ 18 }
20 Of straw	{ 1,621 .. }	{ 1,011 220 }	{ 699 .. }	{ 822 129 }	{ 27 }	{ 28 }
20 Of other materials	{ 1,826 .. }	{ 1,419 186 }	{ 523 .. }	{ 577 199 }	{ 25 }	{ 26 }
Children's						
10 Of wool felt or fur felt	204	104	..	88	7	7
20 Of other materials	{ 574 .. }	{ 156 88 }	{ .. }	{ 133 }	{ 5 }	{ 5 }
20 Hats of imitation fur (men's, women's and children's)	..	(d)	996	726	17	18
20 Caps, other than riding and uniform caps (e)						
Men's and youths'	{ 2,928 .. }	{ 916 97 }	{ 2,381 .. }	{ 929 99 }	{ 37 }	{ 38 }
Boys'	615	140	..	46	7	7
20 Riding caps	..	(d)	100	157	*	5
20 Uniform caps of all descriptions	2,052	1,134	1,024	732	10	12
20 Helmets						
Motor cyclists' and similar crash helmets	{ 131 .. }	{ 226 143 }	{ 234 }	{ 419 }	{ * }	{ * }
Industrial protective helmets	{ 124 .. }	{ 92 57 }	{ 117 .. }	{ 61 277 }	{ 6 }	{ 6 }
Other, including uniform helmets	..	280	..	284	6	7

TABLE 5(ii) (continued)

Industry sub-division (a)	1963		1968			
	Quantity	Value	Quantity	Value	Enter-prises	Entries
		£'000		£'000	Number	Number
20 Other hatters' and milliners' wares, trimmings, etc (including hardened forms but excluding hatters fur)	..	153	..	178	10	11
Other products	..	71	..	99	7	8
Waste products	..	10	..	5	12	13
Work done		149		157	17	19
Total		14,790		12,807	..	..
Sales in other industries (see Table 6)		364		462	..	..
Principal products of this industry sold by establishments in the industry		14,426		12,345	62	67(f)

(a) Excluding sales of headwear made up from knitted fabric by establishments classified to the Hosiery and Other Knitted Goods Industry (Part 104).

(b) The number given is that of the sub-division of which the item is a characteristic product. The sales shown are total sales by larger establishments, not merely sales by establishments classified to the sub-division.

(c) For 1963, hats of imitation fur were not specifically excluded.

(d) Not recorded separately for 1963.

(e) For 1963, described as 'Caps, other than uniform caps'.

(f) This figure represents the total number of returns made for larger establishments in this industry which is less than the total number of establishments shown in Table 4 on account of combined returns covering more than one establishment.

TABLE 6 Sales of principal products of the industry by larger establishments classified to other industries, 1963 and 1968

Establishments employing 25 or more persons:
Analysis of returns received, United Kingdom

	1963		1968			
	Quantity	Value	Quantity	Value	Entries	Principal industries in which produced (a)
	Thousands	£'000	Thousands	£'000	Number	
Men's and youths' caps (other than riding and uniform caps)	{ 230 .. }	{ 49 97 }	{ 426 }	{ 115 }	{ 22 }	{ 117, 119, 120 }
Industrial protective helmets	..	-	..	265	*	69, 123
Other hats and caps	..	218	..	82	6	42, 118, 122
Total		364		462	..	

(a) The references given are to the list of industries at the front of this report.

TABLE 7 Sales of other than principal products by larger establishments in the industry, 1963 and 1968

Establishments employing 25 or more persons:
Analysis of returns received, United Kingdom

	1963	1968
	Value	Value
	£'000	£'000
Articles of clothing and services rendered to other organisations (a)	472	94
Total value of goods sold without having been subjected to any manufacturing process (merchanted or factored)	914	854
Canteen takings	18	12
Total	1,405	959

(a) Services rendered to other organisations comprises amounts charged for hiring out plant, machinery or other goods, for providing transport, or for technical or other services rendered to other organisations.

TABLE 8 Production of certain principal products of the industry by larger establishments, 1963 and 1968

This table is not applicable to this industry.

TABLE 9 Purchases by larger establishments of selected principal products of the industry, 1968

This table is not applicable to this industry.

TABLE 10 Purchases by larger establishments in the industry, 1963 and 1968

Establishments employing 25 or more persons: Analysis of returns received, United Kingdom

	1963		1968	
	Quantity	Cost	Quantity	Cost
Materials for use in production		£'000		£'000
Wool, raw (on a cleaned scoured basis)	..	258	..	177
Fur	..	922	..	641
Straw in plait	..	186	..	143
Glass fibre (woven, mat or rovings)	..	..	..	28
Polyester resins	..	(a)	..	19
Cork	..	..	..	14
Woven piece goods (other than narrow fabrics) wholly or mainly of	Th.sq.yds.		Th.sq.yds.	
Cotton	{ 1,410	257	{ 394	100
	..	77	..	78
Wool	876	454	{ 442	269
			..	121
Synthetic fibres (nylon, etc)	{ 358	287	{ 285	284
	..	59	..	91
Other man-made fibres (rayon, etc)	{ 1,470	435	{ 661	155
	..	85	..	131
Knitted piece goods	..	(a)	..	112
Hoods and capelines				
Of wool felt	..	349	..	313
Of fur felt	..	534	..	506
Of other materials	..	276	..	312
Shapes				
Of wool felt	..	73	..	57
Of fur felt	..	60	..	56
Of other materials including shapes for helmets	..	74	..	90
Hat leathers	..	198	..	97
Artificial flowers, foliage and ornamental feathers	..	99	..	88
Other hatters' and milliners' wares, trimmings, galloons, lace and lace net including veilings, etc	..	503	..	372
Dyestuffs and proofing materials	..	111	..	70
Replacement parts for firms' own machinery, plant and vehicles, and accessories and consumable tools bought as replacement				
Tyres and other spare parts for firms' own road goods vehicles	{ ..	(a)	{ ..	4
Other	..	..	..	58
All other materials for use in production	..	1,193	..	753
Packaging materials				
Boxes, cartons, drums and canisters (with or without metal ends) of paper and cardboard	..	211	..	163
All other packaging materials	..	44	..	39
Fuel and electricity (b)	Th.tons		Th.tons	
Coal	16.7	92	{ 5.2	33
			..	4
Coke (including screenings) and manufactured fuel	2.3	22	{ 0.5	6
			..	17

Continued on next page.

TABLE 10 (continued)

	1963		1968	
	Quantity	Cost	Quantity	Cost
Fuel and electricity (b) (continued)	Th.gal.	£'000	Th.gal.	£'000
Derv fuel and motor spirit for use in road vehicles	77.5	17	52.3	15
	..	6	..	2
Other liquid fuels (including creosote/pitch mixtures, etc. and liquefied petroleum gases)	1,311	51	674	31
			..	17
	Th.therms		Th.therms	
Gas	180	16	93	9
	..	8	..	5
	Th.kWh		Th.kWh	
Electricity	8,507	66	4,794	52
	..	28	..	27
All other fuels	..	(a)	..	4
Total cost of materials and fuel		7,052		5,561
Goods purchased for merchanting		720		689
Canteen purchases		22		19
Total cost of purchases		7,794		6,269

(a) Not recorded separately for 1963.

(b) Owing to the risk of disclosure of information relating to individual firms the total quantity of electricity generated in firms' own establishments in 1963 cannot be given. None was recorded in this industry in 1968.

TABLE 11 Transport costs and employment of larger establishments, 1963 and 1968

Establishments employing 25 or more persons:
Analysis of returns received, United Kingdom

	Unit	1963	1968
Average number mainly employed on transport	No.	54	32
Transport costs			
Wages and salaries	£'000	32	27
Derv fuel and motor spirit	"	24	17
Tyres and other spare parts for road goods vehicles	"	..	4
Payments to other organisations for transport	{ by road by rail and other means excluding postal services	{ 143	{ 58
Costs of operating road goods vehicles			119
Insurance	"	6	4
Vehicle licences	"	3	4
Depreciation	"	22	12
Payments to other organisations for repairs and maintenance	"	11	11
Total	"	241(a)	256

(a) Excluding tyres and other spare parts for road goods vehicles, not collected separately for 1963.

TABLE 12 Payments for certain services, etc by larger establishments, 1963 and 1968 (a)

Establishments employing 25 or more persons:
Analysis of returns received, United Kingdom

	Amounts payable	
	1963	1968
Repairs and maintenance to	£'000	£'000
Buildings	27	23
Road goods vehicles	11	11
Plant, machinery and other capital equipment	69	57
Insurance, licensing and depreciation of road goods vehicles (b)	32	19
Rates, excluding water rates	103	126
Hire of plant and machinery	4	5
Postage, telephone, telegrams, cables and telex (c)	61	73
Total	308	314

(a) No deduction is made for these payments to arrive at the figures of net output given in this report.

(b) For details see Table 11.

(c) Excluding telex for 1963.

TABLE 13 Percentage analysis of twelve-month periods covered by returns from larger establishments, 1968

Establishments employing 25 or more persons:
Analysis of returns received, United Kingdom

Year ended	Percentage of total returns received	Percentage of total number employed
1968	Per cent.	Per cent.
April (a)	1.5	3.0
May	1.5	0.7
June	6.0	2.1
July	3.0	2.5
August	3.0	2.2
September	3.0	1.2
October	4.5	3.0
November	19.4	16.2
December	40.2	46.1
1969		
January	4.5	3.0
February	1.5	0.4
March	11.9	19.6
April (b)	0.0	0.0
	100	100

(a) From 6 April.

(b) To 5 April.