

BOARD OF TRADE

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*The Report on the  
Census of Production  
for 1954*

Volume 7: Industry E

FELLMONGERY

*Presented by the Board of Trade to Parliament in pursuance of the  
Statistics of Trade Act, 1947 (Geo. 6 Ch. 39, Sec. 7)*



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# The Report on the Census of Production for 1954

VOLUME 7, INDUSTRY E

FELLMONGERY

THIS REPORT on Fellmongery relates to establishments engaged wholly or mainly in the removal of wool from sheep and lamb skins and in making sheepskin mats and rugs.

In 1948 and 1951 almost all the work done by fellmongers on sheep and lamb skins of United Kingdom origin was carried out on commission for the Ministry of Agriculture and Fisheries or for the Ministry of Food. For this reason, the figures given for those years are not in all respects comparable with those for 1954.

This industry corresponds to minimum list heading 130(2) in the Standard Industrial Classification. There were no larger establishments in Northern Ireland in the register for this industry.

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IMPORTANT NOTES and definitions appear on the next page. In interpreting the data in the tables it is essential to bear these in mind.

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The following notes describe terms in general use in the tables of the report. More detailed explanations of the terms used and a description of the scope and method of taking the census are given in the separate booklet entitled 'The Report on the Census of Production for 1954 - Introductory Notes' (price 1s. 6d. net).

**Industrial Classification:** Establishments are classified to industries according to the nature of their output and, as far as possible, in conformity with the Standard Industrial Classification. Certain products are identified as the principal products of individual industries, the principal products for a given industry being of a similar nature or commonly associated in production. The principle of classification normally followed is that an establishment is classified to an industry if its output of the principal products of that industry accounted for a greater proportion of the value of its output than did its output of the principal products of any other industry.

**Specialist producers** normally comprise those establishments 50 per cent. or more of whose total output by value is accounted for by the characteristic products of the specialist group.

**Intermediate products:** For some industries figures are given showing the total quantities made during the year of intermediate products, i.e., products which may be further processed in the establishments in which they are produced.

**Larger establishments:** The information given in the report relates mainly to 'larger establishments', i.e., establishments of firms employing on the average more than 10 persons. In most cases an establishment comprises the whole of the premises under the same ownership or management at a particular address (e.g., a mine or factory). Offices, warehouses, laboratories and other ancillary places of business situated apart from the producing works are not regarded as separate establishments and are included in the return for the works.

**Small firms** are those employing on the average 10 or fewer persons.

The estimates for the industry as a whole given in Table 1 are normally obtained by increasing the other items shown in the same proportion as total employment.

**Gross output (production)** is the total value of goods made and other work done during the year: it is obtained by adjusting the value of sales and work done during the year for changes in the value of stocks of products on hand for sale and work in progress.

**Net output** is the amount left after deducting from the value of gross output the aggregate of the cost of materials and fuel used, the amount paid for work given out, and, for 1951 and 1954, any transport payments made. This represents the value added to materials by the process of production, and constitutes the fund from which wages, salaries, rents, rates and taxes, advertising and other selling expenses and all other similar charges have to be met, as well as depreciation and profits.

**Sales** means sales during the year of goods made in the establishment covered by the return or made on commission for it, whether produced in the year or not. The value of sales is the net selling value, i.e., the amount charged to customers, whether on an ex-works or delivered basis, and net of any trade discounts, agents' commissions, allowances for returnable cases, purchase tax, etc. For goods charged on a delivered basis to customers overseas, firms were required to give the f.o.b. value.

**Materials and fuel:** The total cost of materials and fuel purchased includes all purchases during the year of materials for use in production, and of fuel (includ-

ing oil, gas and electricity) for all purposes: packing materials, including the full cost of returnable cases when first purchased; workshop and office materials; water charges; materials for repairs to buildings, plant and vehicles when carried out by firms' own work-people included in their returns; consumable tools; and parts for machinery purchased as replacements. Purchases of goods for merchandising are excluded. The cost of materials and fuel used, given in Table 2, is obtained by adjusting purchases for changes during the year in the value of stocks.

**Stocks:** Firms were required to give stocks of materials and fuel, products on hand for sale, and work in progress, at income tax values.

**Customs and Excise Duty** paid on materials purchased is normally included in the cost of materials. Finished goods are similarly valued as they were sold, duty-paid or duty-free. The net amount of any duty paid is deducted in arriving at net output.

**Employment:** Total employment includes working proprietors, administrative, technical and clerical employees, and operatives, but excludes outworkers, canteen employees and persons engaged in merchandising or any other activity not covered by a firm's return, who are shown separately as excluded employees. Employees are persons on the pay-roll (i.e., persons whose National Insurance cards were held by employers), whether employed full-time or part-time.

**Working proprietors** are proprietors of businesses other than limited companies, together with members of their families who worked in the business without receiving fixed wages or salaries. Any persons working less than half the normal hours are excluded. For Northern Ireland directors of limited companies (other than those paid by fee only) are also included.

**Administrative, technical and clerical employees** include directors, other than those paid by fee only (except in Northern Ireland); managers, superintendents and works foremen; research, experimental, development, technical and design employees (other than operatives); draughtsmen and tracers; travellers; and office (including works office) employees.

**Operatives** include all other classes of employees, i.e., broadly speaking, all manual workers.

**Outworkers** are persons employed by the firm who work on materials supplied by the firm in their own homes.

**Wages and salaries** include all overtime payments, bonuses and commissions without any deductions for income tax, insurances, contributory pensions etc. They exclude payments to working proprietors.

**Capital expenditure** includes expenditure on new building work, and on plant, machinery and vehicles, charged to capital account during the year, including any transport and installation costs involved. It includes expenditure in respect of establishments in Great Britain which had not begun production before the end of the year (which has not previously been included in the Census of Production reports for individual industries).

**Symbols used:**

- .. for not available
- for nil or negligible (less than half the final digit shown).

Where figures are rounded, e.g., given to the nearest £ thousand, there may be apparent slight discrepancies between the sums of constituent items and the totals shown. In some cases, figures have been combined with others of a similar nature where publication of separate details might disclose information relating to an individual undertaking.

## Industry summary

Estimates for the industry as a whole

TABLE 1

	United Kingdom			Scotland 1954	Wales 1954
	1948	1951	1954		
	£ million	£ million	£ million	£ million	£ million
Gross output (production)	3.6	6.6	13.3	4.19	0.52
Net output	1.2	0.5	2.3	0.82	0.14
Total stocks and work in progress					
At beginning of year	0.3	0.7	2.3	0.88	0.04
Change during year	+ 0.2	+ 0.1	-	- 0.02	- 0.03
Capital expenditure less disposals (a)	0.1	0.1	0.2	0.06	0.01
Wages and salaries	0.6	0.7	1.0	0.34	0.06
Total employment (including working proprietors)	Thousands 1.8	Thousands 1.8	Thousands 2.0	Thousands 0.74	Thousands 0.11

(a) Capital expenditure on new building work, plant, machinery and vehicles, (including (except in 1948) that incurred in Great Britain for establishments not yet in production), less amounts received for plant, machinery and vehicles disposed of.

## Summary of returns received

TABLE 2

	Unit	Great Britain	United Kingdom	
		1948	1951	1954
<b>FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS</b>				
Number of establishments	No.	44	43	42
Total value of sales and work done	£'000	2,947	6,006	11,691
Products on hand for sale	"	231	680	897
and work in progress	"	+ 133	+ 92	+ 311
Gross output (production) (a)	"	3,073	6,097	12,001
Purchases of materials and fuel	"	1,955	4,820	9,468
Stocks of materials and fuel	"	606	1,418	1,161
at beginning of year	"	606	1,418	1,161
change during year	"	- 83	- 786	- 323
Cost of materials and fuel used	"	2,038	5,606	9,791
Payment for work done on materials given out	"	33	35	52
Payment for transport (b)	"	8	44	88
Net output	"	1,001	413	2,070
Average number of employees	"	1,364	1,407	1,528
operatives	"	189(c)	228	227
others	"	1,574	1,657	1,780
Total employment (d)	"	1,574	1,657	1,780
Net output per person employed (d)	£	636	249	1,163
Wages and salaries	£'000	396	475	677
of operatives	"	93	129	181
of others	"			
Capital expenditure	"			
New building work (e)	"	10	40	32
Plant and machinery	"	32	46	52
acquisitions (e)	"			
disposals	"		1	
Vehicles	"	11	23	64
acquisitions (e)	"			
disposals	"	2	3	14
<b>FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS</b>				
Number of returns	No.	34	19(f)	26
Total employment, including working proprietors	"	189	117(f)	171

(a) For the year 1948 gross output excludes payments for transport services outwards on finished goods sold. For subsequent years gross output includes payments to other firms and undertakings and to firms' own separate transport organisations for transport services.

(b) Payments to other firms and undertakings and to firms' own separate transport organisations. For the year 1948 payments cover only transport outwards of finished goods sold. For subsequent years they cover payments for transport of both finished goods sold and materials and fuel purchased.

(c) Number in week ended September 25, 1948.

(d) Including working proprietors.

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

(f) Excluding Northern Ireland. No information about small firms was collected in Northern Ireland for 1951.



## FELLMONGERY

Analysis by size, 1954

Larger establishments in the United Kingdom

TABLE 3

Average number employed (a)	Estab-lish-ments	Gross output	Net output	Employees		Wages and salaries		Capital expenditure (b)	Net output per person employed (a)
				Operatives	Others	Operatives	Others		
	Number	£'000	£'000	Number	Number	£'000	£'000	£'000	£
11 - 24	14	2,287	414	221	27	106	25	27	1,588
25 - 49	14	3,460	703	408	68	181	59	61	1,461
50 - 199	14	6,254	953	899	132	390	97	60	918
Total	42	12,001	2,070	1,528	227	677	181	148	1,163

(a) Including working proprietors.

(b) Capital expenditure on new building work and on acquisition of plant, machinery and vehicles. Excluding expenditure for establishments not yet in production.

Analysis according to specialisation within the industry, 1954

Larger establishments in the United Kingdom

TABLE 4

	Unit	Specialist producers of		Remainder of the industry	Total
		Sheep or lamb pelts of United Kingdom origin	Sheep or lamb pelts of imported origin		
Number of establishments	No.	32	6	4	42
Total value of sales and work done	£'000	8,429	2,929	332	11,691
Sales of characteristic products	"	7,741	2,566		
Products on hand for sale and work in progress	{ at beginning of year change during year	+ 523 147	+ 351 157	+ 23 6	+ 897 311
Gross output (production)	"	8,576	3,086	338	12,001
Purchases of materials and fuel	"	6,988	2,252	228	9,468
Stocks of materials and fuel	{ at beginning of year change during year	+ 143 12	- 1,002 340	+ 17 5	- 1,161 323
Cost of materials and fuel used	"	6,977	2,591	223	9,791
Payment for work done on materials given out	"	10	42	-	52
Payment for transport	"	54	28	6	88
Net output	"	1,535	425	109	2,070
Average number of employees	{ operatives others	No. 946 137	442 54	140 36	1,528 227
Total employment (a)	"	1,102	496	182	1,780
Net output per person employed (a)	£	1,393	857	600	1,163
Wages and salaries	{ of operatives of others	£'000 430 104	191 53	56 23	677 181
Capital expenditure (b)					
New building work	"	24	1	.7	32
Plant and machinery	{ acquisitions disposals	" 34 -	6 -	11 -	52 -
Vehicles	{ acquisitions disposals	" 53 14	4 -	7 -	64 14

(a) Including working proprietors.

(b) Excluding expenditure at establishments not yet in production.

## FELLMONGERY

Sales of the principal products of the industry, including sales of these products by establishments classified to other industries

Larger establishments in the United Kingdom

TABLE 5

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
Pelts	Th.skins	£'000	Th.skins	£'000	Number
Sheep and lamb					
Of United Kingdom origin			6,997	2,399	35
Imported	1,832	351	1,315	177	13
			..	29	
Other	58	36	..	68	6
Wool	Th.lb.		Th.lb.		
Of United Kingdom origin	803	207	24,664	5,863	37
Imported	9,040	4,411	8,720	2,830	18
Articles made from Sheep or Lamb Skins	Th.		Th.		
Floor rugs and mats	31	135	17	63	5
Other goods	..	57	..	86	..
Work done for the trade or on commission (a)		748		113	9
				132	9
Total		6,079		11,759	..
Sales in other industries (see Table 6)		453		495	..
Principal products of this industry sold by establishments in the industry		5,627		11,264	41

(a) Amount charged. For 1951 the value shown includes the value of work done in fellmongery pelts owned by the Ministry of Food.

Sales of principal products of the industry by establishments classified to other industries

Larger establishments in the United Kingdom

TABLE 6

	1954			Principal industries in which produced (a)
	Quantity	Value	Entries	
Pelts	Th.skins	£'000	Number	
	76	4	16	
	..	164	..	
Wool	Th.lb.			
	2,001	379	6	
Articles made from sheep or lamb skins	..	49	..	
Total		495	..	

(a) Production is widely distributed among other industries.



Sales in the industry of other than principal products  
Larger establishments in the United Kingdom

TABLE 7

	1954	
	Quantity	Value
Goods made	..	£'000 400
Waste for gelatine and glue making	Th.cwt. 44.1	9
Other waste products	..	18
Total		427

TABLE 8 - Total make of intermediate products  
Larger establishments in the United Kingdom

This table is not applicable to the industry.

Purchases of materials and fuel, 1954  
Larger establishments in the United Kingdom

TABLE 9

	Quantity		Cost
	Th.	Th.cwt.	£'000
Materials			
Sheep and lamb skins			
Of United Kingdom origin	1,257	124	1,150
Imported	7,711	..	5,639
Other skins	661	44	845
All other purchased materials	220	..	246
	..	74	1,208
	24	..	24
	..	..	26
			207
Fuel and electricity			
Coal	Th.tons 11.3		44
Coke	3.3		18
Liquid fuels (including creosote/pitch mixtures)			
For use in internal combustion engines	Th.gal.		
Motor spirit (petrol) for use in road vehicles and derv. fuel	184		23
Other	..		4
For burning in furnaces, boilers, kilns, etc.	184		10
Gas purchased	Th.therms		
From Gas Boards	13		1
Electricity purchased (a)	Th.kWh.		
From Electricity Boards	1,826		13
From other sources, including other departments of the firms	..		2
All other purchased and unclassified fuel	138		1
			3
Total cost			9,468

(a) The total quantity of electricity generated in firms' own establishments in the industry in 1954 was 725 Th.kWh.

Average number of employees, and wages, salaries and superannuation payments  
Larger establishments in the United Kingdom

TABLE 10

	1951	1954
	Number	Number
Average number of employees		
Operatives	1,407	1,528
Administrative, technical and clerical employees	228	227
Total	1,635	1,755
Wages and salaries paid to	£'000	£'000
Operatives	475	677
Administrative, technical and clerical employees	129	181
Total	603	858
Wages and salaries per head	£	£
Operatives	338	443
Administrative, technical and clerical employees	566	798
Superannuation and other pension funds for employees and dependents		£'000
Employers' contributions	..	10
Employees covered	..	Number 392
Pension, etc. payments to former employees and dependents	..	£'000 3

Employment in a specified week (a)  
Larger establishments in the United Kingdom

TABLE 11

	1951			1954		
	Males	Females	Total	Males	Females	Total
	Number					
Working proprietors	21	1	22	23	2	25
Operatives	1,337	106	1,443	1,459	131	1,590
Administrative, technical and clerical employees	163	65	228	160	67	227
Total employees	1,500	171	1,671	1,619	198	1,817

(a) Week ended September 22, 1951, or October 30, 1954.



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