

THE LEATHER TRADES.

General Report.

This group comprises only three trades, viz., the Fellmongery, Leather (Tanning and Dressing) and Leather Goods Trades. In view of the small number of trades included in the group and the fact that one of them is of relatively small importance, the report for the group as a whole will, in general, be confined to such particulars as are not given in the reports on the individual trades.

Principal results.

The main particulars obtained for 1930 and 1924 are set out in the following table:—

| Trade. | Gross output (selling value of goods made and value of work done). | Cost of materials used and amount paid for work given out. | Net output (excess of Col. (2) over Col.(3)). | Average number of persons employed (except out-workers). | Net output per person employed. | Mechanical power available. |
|-------------------------------------|--|--|---|--|---------------------------------|-----------------------------|
| (1) | (2) | (3) | (4) | (5) | (6) | (7) |
| | £'000 | £'000 | £'000 | No. | £ | Thous. H.P. |
| Fellmongery ... | 1930 3,186 | 2,670 | 516 | 2,358 | 219 | 3·3 |
| | 1924 4,718 | 3,845 | 873 | 2,405 | 363 | 3·2 |
| Leather (Tanning and Dressing)* | 1930 27,792 | 20,437 | 7,355 | 28,506 | 258 | 72·3 |
| | 1924 32,215 | 23,771 | 8,444 | 30,413 | 278 | 66·2 |
| Saddlery, Harness and Leather Goods | 1930 5,039 | 2,730 | 2,309 | 15,282 | 151 | 2·6 |
| | 1924 5,137 | 2,825 | 2,312 | 15,611 | 148 | 3·0 |
| TOTAL—UNITED KINGDOM ... | 1930 36,017 | 25,837 | 10,180 | 46,146 | 221 | 78·2 |
| | 1924 42,070 | 30,441 | 11,629 | 48,429 | 240 | 72·4 |
| England and Wales... | 1930 33,515 | 23,959 | 9,556 | 43,152 | 221 | 73·1 |
| | 1924 39,125 | 28,151 | 10,974 | 45,748 | 240 | 68·3 |
| Scotland ... | 1930 2,465 | 1,856 | 609 | 2,849 | 214 | 5·0 |
| | 1924 2,920 | 2,275 | 645 | 2,563 | 252 | 4·1 |
| Northern Ireland ... | 1930 37 | 22 | 15 | 145 | 103 | 0·1 |
| | 1924 25 | 15 | 10 | 118 | 101 | — |

* Great Britain.

Comparability of results.—All particulars relating to Great Britain, for both 1930 and 1924, are confined to firms employing more than ten persons, but those relating to Northern Ireland apply to firms employing more than five persons for the year 1930 and, with some minor exceptions, to all firms for the year 1924. This slight difference in scope, however, has no appreciable effect on the comparability of the aggregates for the group as a whole.

Deficiencies due to the exclusion of small firms in Great Britain.

—There will be found in the report on each trade a brief section setting out the number of persons reported to have been employed in both 1924 and 1930 by firms employing not more than ten

persons, with details of the chief classes of goods made and work done by these firms in the earlier year. Taking the leather group as a whole, 6,839 persons were stated to have been employed by firms of this class at the 1930 Census and 5,897 at that of 1924. The 1924 figures include the small number of persons employed in Northern Ireland in the Leather (Tanning and Dressing) Trade. Thus of the aggregate number of employees recorded by firms of all classes, the proportion employed by the smaller firms was 12.9 per cent. in 1930 and 10.9 per cent. in 1924.

About 350 firms to which schedules were sent furnished no information at the 1930 Census, but these outstanding cases are known to have consisted either of small businesses or of businesses which were in operation for only a part of the censal year. The number of firms that furnished no particulars at the previous Census was about 600.

As indicated by the greater number of firms that furnished no particulars at the earlier Census, the apparent increase between 1924 and 1930 in the proportion employed by the smaller firms is due in the main to deficiencies in the 1924 survey of the activities of these small firms, whose business records did not in many cases permit them to supply the detailed information required for that year.

Periods covered by firms' returns.

As explained in Note 1 on page xi, firms were given the option of making returns for the calendar year 1930 or for their period of account most closely corresponding thereto, provided that the ending date of that period was not later than 31st March, 1931. The following table shows, for the Leather Trades as a whole, the total number of returns and the number of persons employed according to the periods covered by the returns for 1930:—

| Month. | Number of returns. | | Persons employed. | |
|------------------------|--------------------|---------------------|-------------------|---------------------|
| | Number. | Per cent. of total. | Average number. | Per cent. of total. |
| April, 1930 | 10 | 1.3 | 511 | 1.1 |
| May, 1930 | 13 | 1.6 | 895 | 1.9 |
| June, 1930 | 29 | 3.7 | 1,623 | 3.5 |
| July, 1930 | 6 | 0.7 | 295 | 0.7 |
| August, 1930 | 19 | 2.4 | 1,102 | 2.4 |
| September, 1930 | 18 | 2.3 | 980 | 2.1 |
| October, 1930 | 19 | 2.4 | 1,099 | 2.4 |
| November, 1930 | 40 | 5.0 | 2,513 | 5.5 |
| December, 1930 | 480 | 60.6 | 27,944 | 60.7 |
| January, 1931 | 29 | 3.7 | 1,577 | 3.4 |
| February, 1931 | 12 | 1.5 | 630 | 1.4 |
| March, 1931 | 117 | 14.8 | 6,832 | 14.9 |
| TOTAL | 792 | 100.0 | 46,001 | 100.0 |

The mean terminal date of all returns for the Leather Trades at the Fourth Census was the beginning of the last week in

December, 1930, and the recorded production may be taken as representing substantially the output of the calendar year. About 61 per cent. of the total number of returns received were for the calendar year, and the firms concerned employed substantially the same proportion of the total number of persons recorded. The following table shows the number of returns and the numbers employed in each trade in respect of these firms:—

Returns covering the twelve months ended December 31st, 1930.

| Trade. | Number of returns. | | Persons employed. | |
|--|--------------------|---------------------|-------------------|---------------------|
| | Number. | Per cent. of total. | Average number. | Per cent. of total. |
| Fellmongery | 31 | 50.0 | 1,292 | 54.8 |
| Leather (Tanning and Dressing) | 268 | 60.5 | 16,619 | 58.3 |
| Saddlery, Harness and Leather Goods | 181 | 63.1 | 10,033 | 66.3 |
| TOTAL | 480 | 60.6 | 27,944 | 60.7 |

The above particulars relate only to firms in Great Britain, a similar analysis of the returns furnished at the Census of Northern Ireland not being available.

Wages.

The table on page 314 summarises the information available as to the amount of wages paid by firms in the Leather Trades in 1930 and 1924. The particulars of wages shown in line (8) are those ascertained by the Ministry of Labour as a result of the voluntary inquiries undertaken by that Ministry into wages and hours of labour in the United Kingdom.

Owing, however, to various causes, including the fact that certain firms owning several establishments made combined returns to one Department and separate returns to the other, it has not been found practicable to secure comparable particulars in respect of all firms that furnished particulars of wages to the Ministry of Labour.

The numbers of operatives shown in lines (1) and (3) are those returned to the Census of Production as employed by the firms concerned in the weeks ended 18th October, 1930 and 1924, and the average during the year 1930 respectively. The amount of wages paid shown in line (8) was the aggregate returned to the Ministry of Labour in respect of the same firms. The proportion of each trade represented by the firms that furnished particulars of their wage bills is shown in lines (2) and (4) based on the numbers of operatives employed and, in line (7), on net output. The average numbers of operatives employed during the year 1924, corresponding to those given in line (3) in respect of 1930, are not available.

The figures of wages for both years relate to firms employing on an average more than ten persons during the respective years and cover firms in Great Britain only.

Firms furnishing returns of wages.

| Particulars. | Fellmongery Trade. | | Leather (Tanning and Dressing) Trade. | | Saddlery, etc., Trade. | | Total. | |
|--|--------------------|-------|---------------------------------------|--------|------------------------|-------|--------|--------|
| | 1930. | 1924. | 1930. | 1924. | 1930. | 1924. | 1930. | 1924. |
| Operative staff employed :— | | | | | | | | |
| Number during week ended 18th October ... | 1,068 | 1,329 | 16,126 | 20,455 | 6,587 | 8,701 | 23,781 | 30,485 |
| Percentage of total ... | 52.6 | 60.8 | 63.8 | 74.2 | 48.6 | 61.7 | 58.2 | 69.5 |
| Average number during year ... | 1,065 | * | 16,088 | * | 6,448 | * | 23,601 | * |
| Percentage of total ... | 51.7 | * | 63.5 | * | 48.0 | * | 57.8 | * |
| Gross output (£'000) ... | 1,892 | * | 18,769 | * | 2,477 | * | 23,138 | * |
| Net output (£'000) ... | 226 | 459 | 4,772 | 6,376 | 1,131 | 1,447 | 6,129 | 8,282 |
| Percentage of total ... | 43.8 | 52.6 | 64.9 | 75.5 | 49.3 | 62.8 | 60.3 | 71.3 |
| Wages paid (£'000) ... | 149 | 153 | 2,136 | 2,729 | 578 | 762 | 2,863 | 3,644 |
| Percentage of net output represented by wages... | 65.9 | 33.3 | 44.8 | 42.8 | 51.1 | 52.7 | 46.7 | 44.0 |

* Not available.

The proportion of the total covered by the firms that furnished particulars of wages was less for each trade in 1930 than in 1924. For the Leather Trades as a whole, the proportion declined from 69.5 per cent. in 1924 to 58.2 per cent. in 1930 as measured by operatives employed and from 71.3 per cent. to 60.3 per cent. as measured by net output.

A noteworthy feature of the above table is the change in the proportion which wages formed of net output in the case of the Fellmongery Trade from one-third in 1924 to practically two-thirds in 1930. In the other two trades the proportion was about the same in the two years.

Power.

Total power in use.—The figures in the following table represent the estimated amount of power actually employed by each of the Leather Trades in the two years. For the purpose of arriving at the power applied mechanically, the capacity of the prime movers required to drive electric generators has been calculated and deducted from the total capacity of the prime movers; the power applied electrically represents the capacity of electric motors driven by generators at firms' works added to that of motors driven by purchased electricity. As the basis for calculating the amount of the primary power that is converted into electrical energy, 746 kilowatts of electrical energy have been taken as equivalent to 1,000 horse-power of primary power and an average loss of 10 per cent. in transmission has been allowed except for steam turbines, in which the loss is negligible. The power capacity recorded as "ordinarily in use" has been taken as the basis of the calculation in all cases.

The horse-power of motors designed to be driven by electricity generated in the same works may be greater than that of the prime movers used (or calculated in this manner to have been necessary) to drive them, since machines required for special processes are frequently equipped with individual motors which will only be

in use on those occasions when the need for those processes arises. Further, the capacity measurement which firms were instructed to state was the effective horse-power which their engines could develop and this measurement does not necessarily represent the capacity at which the engines were normally operated. For these reasons, the figures given below should not be taken as providing more than a rough indication of the actual amount of power employed by any trade or of the degree of its electrification.

Power in use in 1930 and 1924.

| Trade. | Power applied mechanically. | Power applied electrically. | Total power. | Per head of average number of operatives employed. |
|--|-----------------------------|-----------------------------|------------------------|--|
| | Th. H.P. | Th. H.P. | Th. H.P. | H.P. |
| Fellmongery... .. | 1930 1.0 1924 1.1 | 1930 2.4 1924 1.5 | 1930 3.4 1924 2.6 | 1930 1.63 1924 1.28 |
| Leather (Tanning and Dressing) | 1930 13.5 1924 17.2 | 1930 50.9 1924 39.3 | 1930 64.4 1924 56.5 | 1930 2.54 1924 2.08 |
| Saddlery, Harness and Leather Goods | 1930 0.2 1924 0.6 | 1930 2.2 1924 2.1 | 1930 2.4 1924 2.7 | 1930 0.18 1924 0.19 |
| TOTAL | 1930 14.7 1924 18.9 | 1930 55.5 1924 42.9 | 1930 70.2 1924 61.8 | 1930 1.72 1924 1.43 |

Consumption of fuel.

Coal and coke.—At the 1930 Census, all firms were required to state the total quantity of coal and coke used for generating power (i.e., for driving engines), and were also requested to furnish particulars of the amounts used for other purposes on a voluntary basis, as the provisions of the Census of Production Act do not enable the latter to be obtained compulsorily. Certain firms found difficulty in furnishing a trustworthy figure of the quantities used for these two categories separately, and, as appears from the table below, it was necessary to accept a small number of inclusive quantity statements without distinction as to purpose.

Coal and Coke used.

NOTE.—The figures in italics below the name of the trade indicate respectively (1) the percentage of the total capacity of steam engines in use represented by the firms that furnished separate particulars of coal and coke used for power and (2) the percentage of the total net output represented by the firms that furnished separate particulars of coal and coke used for other purposes.

| Trade. | For power. | | For other purposes. | | Unclassified. | |
|---|----------------|--------------|---------------------|----------------|---------------|--------------|
| | Coal. | Coke. | Coal. | Coke. | Coal. | Coke. |
| Fellmongery. <i>(1) 88.2; (2) 93.6 ...</i> | Tons. 5,351 | Tons. 840 | Tons. 6,533 | Tons. 4,344 | Tons. 685 | Tons. 110 |
| Leather (Tanning and Dressing). <i>(1) 99.7; (2) 91.3 ...</i> | 86,315 | 6,586 | 116,345 | 13,932 | 1,687 | 52 |
| Saddlery, Harness and Leather Goods. <i>(1) 100.0; (2) 100.0</i> | 541 | 45 | 1,276 | 1,160 | — | — |
| TOTAL— <i>(1) 99.0; (2) 93.3 ...</i> | 92,207 | 7,471 | 124,154 | 19,436 | 2,372 | 162 |

Taking all Leather Trades together, the proportion of the total steam engine capacity for which the fuel consumption was not separately returned was only 1.0 per cent., while the deficiency in the case of the amounts used for purposes other than driving engines was only 6.7 per cent. of the total net output. On the basis of the very large proportion of the steam engine capacity covered by the record, the total quantities of coal and coke consumed in 1930 for power purposes may be calculated at approximately 93,000 tons and 7,500 tons respectively.

No particulars of oil, gas or other fuel used were ascertained for the year 1930. At the Census of 1924, a voluntary inquiry was made as to the amounts of coal, coke, heavy and light oils, and gas consumed and reference should be made to the Final Report on that Census for particulars of the partial information reported by each of the Leather Trades.

Electricity.—Particulars of the quantity of electricity used were required from all firms, electricity produced by their own generating plant being distinguished from that purchased from outside sources. No separate record of the purpose for which the current was used was obtained.

The following table shows for each of the Leather Trades the total quantities of electricity used in 1930 :—

| Trade. | Electricity purchased. | Electricity generated | | Number of units generated per kilowatt of generators in use. |
|--|------------------------------|------------------------------|-----------------------------------|--|
| | | In same works. | In other works owned by the firm. | |
| | B.T.U. (Kw.-hrs.) '000 | B.T.U. (Kw.-hrs.) '000 | B.T.U. (Kw.-hrs.) '000 | B.T.U. (Kw.-hrs.) |
| Fellmongery | 562 | 795 | 170 | 1,609 |
| Leather (Tanning and Dressing) | 22,223 | 14,764 | 160 | 1,608 |
| Saddlery, Harness and Leather Goods | 2,266 | 64 | 9 | 1,488 |
| TOTAL | 25,051 | 15,623 | 339 | 1,607 |

The figures shown for current generated represent only the amounts generated *and used*, and fall short of the total output of current in cases where electricity was sold to outside consumers.