

THE TOBACCO TRADE

INTRODUCTORY

This trade comprises firms that were engaged wholly or mainly in the manufacture of cigars, cigarettes, tobacco and snuff.

The figures for 1930 have been amended throughout this report.

Table I A.—General summary

| Particulars | 1935 | 1930 | 1924 |
|---|---------|---------|--------|
| | £'000 | £'000 | £'000 |
| Value of products (Gross output) | 121,960 | 117,764 | 96,573 |
| Cost of materials, fuel and electricity used | 93,580 | 87,309 | 72,190 |
| Net output | 28,380 | 30,455 | 24,383 |
| | No. | No. | No. |
| Average number of persons employed | 42,859 | 46,338 | 40,467 |
| | £ | £ | £ |
| Net output per person employed | 662 | 657 | 603 |
| | No. | No. | No. |
| Number of returns | 109 | 125 | 165 |
| Number of establishments | 118 | 146 | * |

* Not available.

Table I B.—Firms employing not more than ten persons on the average

| Particulars | 1935 | 1930 | 1924 |
|---|------|------|------|
| | No. | No. | No. |
| Number of returns received | 76 | 71 | 82 |
| Average number of persons employed :— | | | |
| Males | 181 | 166 | 185 |
| Females | 223 | 238 | 186 |
| TOTAL | 404 | 404 | 371 |
| Number of firms not making returns | — | 10 | 19 |

In 1924 the value of the gross output of the small firms making returns was 0.3 per cent. of the total.

Table II.—Size of establishments in 1935

| Size of establishment (average number employed) | Number of establishments | Gross output | Net output | Number of persons employed | Net output per person employed |
|---|--------------------------|--------------|------------|----------------------------|--------------------------------|
| | No. | £'000 | £'000 | No. | £ |
| 11-24 | 28 | 485 | 115 | 490 | 235 |
| 25-49 | 19 | 1,081 | 217 | 674 | 321 |
| 50-99 | 20 | 1,207 | 381 | 1,492 | 255 |
| 100-199 | 15 | 2,112 | 491 | 2,038 | 241 |
| 200-299 | 9 | 2,865 | 558 | 2,213 | 252 |
| 300-399 | 5 | 3,550 | 763 | 1,722 | 443 |
| 400-499 | 3 | 2,079 | 585 | 1,404 | 416 |
| 500-749 | 5 | 5,102 | 950 | 3,037 | 313 |
| 750-999 | 5 | 8,933 | 2,137 | 4,380 | 488 |
| 1,000 and over... .. | 9 | 94,546 | 22,183 | 25,409 | 873 |
| TOTAL | 118 | 121,960 | 28,380 | 42,859 | 662 |

Table III.—Particulars of output, etc., in each of the principal areas of the United Kingdom

| Area* | Number of establishments† | Gross output | Net output | Number of persons employed | Net output per person employed |
|--------------------|---------------------------|--------------|------------|----------------------------|--------------------------------|
| | No. | £'000 | £'000 | No. | £ |
| 2 | 18 | 9,169 | 2,452 | 6,276 | 391 |
| 3 | 17 | 13,618 | 4,001 | 8,325 | 481 |
| { 1935 | 7 | 460 | 116 | 278 | 416 |
| { 1930 | 10 | 507 | 141 | 382 | 370 |
| 14 | 4 | 2,311 | 403 | 1,468 | 274 |
| 15 | 3 | 339 | 101 | 358 | 281 |
| 14 and 15 { 1935 | 7 | 2,650 | 504 | 1,826 | 276 |
| { 1930 | 9 | 2,950 | 544 | 1,777 | 306 |
| Other areas | 86 | 109,681 | 25,308 | 34,479 | 734 |
| { 1935 | 89 | 100,689 | 25,769 | 35,854 | 719 |
| TOTAL | 118 | 121,960 | 28,380 | 42,859 | 662 |
| { 1930 | 125 | 117,764 | 30,455 | 46,338 | 657 |

* For particulars see page xviii.

† Number of returns for 1930.

Table IV.—No sub-divisions of this trade have been distinguished.

PRODUCTION

Table V A.—Output of principal products

| Kind of output | 1935 | | | 1930 | |
|---|----------|---------|---------|----------|---------|
| | Quantity | Value | Entries | Quantity | Value |
| | Th. lbs. | £'000 | No. | Th. lbs. | £'000 |
| Manufactured tobacco :— | | | | | |
| Cigars | 1,071 | 1,254 | 33 | 1,207 | 1,348 |
| Cigarettes | 153,187 | 96,604 | 67 | 145,500 | 89,542 |
| Cavendish or negrohead | 1,094 | 268 | 9 | 2,210 | 620 |
| Other manufactured tobacco | 50,327 | 23,254 | 74 | 50,149 | 25,645 |
| Snuff for human use | 921 | 514 | 18 | 1,024 | 557 |
| TOTAL — Manufactured tobacco | 206,600 | 121,894 | ... | 200,090 | 117,712 |
| Stalks, shorts or other refuse of tobacco, including offal snuff, sold | 15,455 | 31 | 37 | 14,023 | 38 |
| Work done | ... | 21* | ... | ... | 14* |
| TOTAL — PRINCIPAL PRODUCTS | ... | 121,946 | ... | ... | 117,764 |

* Amount received.

No output of manufactured tobacco was recorded in either year by firms furnishing returns on schedules for other trades.

Table V B.—Output of principal products, 1924-1935

| Kind of output | 1924 | 1930 | 1935 |
|---|-------------------------|---------|---------|
| Manufactured tobacco :— | | | |
| Cigars | <i>Th. lbs.</i> 1,437 | 1,207 | 1,071 |
| | <i>£'000</i> 1,579 | 1,348 | 1,254 |
| Cigarettes | <i>Th. lbs.</i> 92,823 | 145,500 | 153,187 |
| | <i>£'000</i> 63,365 | 89,542 | 96,604 |
| Cavendish or negrohead | <i>Th. lbs.</i> 3,643 | 2,210 | 1,094 |
| | <i>£'000</i> 1,051 | 620 | 268 |
| Other manufactured tobacco | <i>Th. lbs.</i> 57,888 | 50,149 | 50,327 |
| | <i>£'000</i> 30,172 | 25,645 | 23,254 |
| Snuff for human use | <i>Th. lbs.</i> 716 | 1,024 | 921 |
| | <i>£'000</i> 318 | 557 | 514 |
| Total—Manufactured tobacco | <i>Th. lbs.</i> 156,507 | 200,090 | 206,600 |
| | <i>£'000</i> 96,485 | 117,712 | 121,894 |
| Stalks, shorts or other refuse of tobacco, including offal snuff, sold | <i>Th. lbs.</i> 10,414 | 14,023 | 15,455 |
| | <i>£'000</i> 87 | 38 | 31 |
| Work done... .. | <i>£'000</i> 1* | 14* | 21* |
| TOTAL—PRINCIPAL PRODUCTS | <i>£'000</i> 96,573 | 117,764 | 121,946 |

* Amount received.

Table VI.—Average values of goods produced, exported and imported

| Kind of goods | Production (at factory) | | | Exports (f.o.b.) | | Imports (c.i.f.) | |
|-----------------------------------|-------------------------|------------|------------------------------|------------------|------------|------------------|------------|
| | Average value | | 1935 as a percentage of 1930 | Average value | | Average value | |
| | 1935 | 1930 | | 1935 | 1930 | 1935 | 1930 |
| | s. per lb. | s. per lb. | Per cent. | s. per lb. | s. per lb. | s. per lb. | s. per lb. |
| Cigars | 23.43 | 22.33 | 104.9 | 17.17 | 19.25 | 37.72 | 31.36 |
| Cigarettes | 12.61 | 12.31 | 102.5 | 3.28 | 5.10 | 4.75 | 6.41 |
| Cavendish or negrohead | 4.90 | 5.61 | 87.4 | 3.67 | 4.76 | 2.17 | 2.19 |
| Other manufactured tobacco | 9.24 | 10.23 | 90.4 | 1.39 | 5.57 | 2.13 | 2.19 |
| Snuff for human use | 11.16 | 10.89 | 102.5 | 4.14 | 3.69 | — | 0.14 |

The average value of the imports of unstripped unmanufactured tobacco was 1s. 3d. per lb. in 1935 and 1s. 2½d. per lb. in 1930, whilst the rate of Customs duty on such tobacco was 9s. 6d. per lb. in 1935 and 8s. 10d. per lb. in 1930, the preferential rates on Empire-grown tobacco being 7s. 5½d. per lb. in 1935 and 6s. 9½d. per lb. in 1930. The proportion of unmanufactured tobacco imported from the British Empire rose from 15 per cent. of the total in 1930 to 18 per cent. in 1935 but the proportion retained for home consumption rose from 17 to 22 per cent. The average rate of duty on imports of unmanufactured tobacco retained for home consumption in the calendar year was 8.87s. per lb. in 1935 as compared with 8.27s. per lb. in 1930.

Table VII.—Volume of Production, 1924-1935

| Kind of output | Total production | | | Production index (1935 = 100) | |
|---|------------------|--------------|------------------------|-------------------------------|-----------|
| | 1935 as returned | 1930 | | 1924 | 1930 |
| | | As returned | At 1935 average values | | |
| | <i>£'000</i> | <i>£'000</i> | <i>£'000</i> | Per cent. | Per cent. |
| Cigars | 1,254 | 1,348 | 1,414 | 135 | 113 |
| Cigarettes | 96,604 | 89,542 | 91,760 | 61 | 95 |
| Cavendish or negrohead | 268 | 620 | 542 | 333 | 102 |
| Other manufactured tobacco | 23,254 | 25,645 | 23,172 | 115 | 100 |
| Snuff for human use | 514 | 557 | 571 | 78 | 111 |
| Stalks, shorts or other refuse of tobacco, including offal snuff, sold | 31 | 38 | 28 | 67 | 91 |
| Work done | 21 | 14 | 14 | 5 | 67 |
| TOTAL | 121,946 | 117,764 | 117,501 | 73 | 96 |

Table VIII.—Production in relation to Exports and Imports

| Kind of goods | Production | Exports | Proportion of production exported | Retained imports | Avail-able for use in the United Kingdom | Share of home market held by British goods |
|-----------------------------------|--------------|----------|-----------------------------------|------------------|--|--|
| | | | | | Th. lbs. | Per cent. |
| | Th. lbs. | Th. lbs. | Per cent. | Th. lbs. | Th. lbs. | Per cent. |
| Cigars | 1935 1,071 | 18 | 1.7 | 557 | 1,610 | 65.4 |
| | 1930 1,207 | 16 | 1.3 | 591 | 1,782 | 66.9 |
| Cigarettes... .. | 1935 153,187 | 22,124 | 14.4 | 137 | 131,200 | 99.9 |
| | 1930 145,500 | 31,068 | 21.4 | 137 | 114,569 | 99.9 |
| Cavendish or negrohead | 1935 1,094 | 727 | 66.5 | 250 | 617 | 59.5 |
| | 1930 2,210 | 1,543 | 69.8 | 335 | 1,002 | 66.5 |
| Other manufactured tobacco | 1935 50,327 | 5,867 | 11.7 | 205 | 44,665 | 99.5 |
| | 1930 50,149 | 476 | 1.0 | 107 | 49,780 | 99.8 |
| Snuff for human use | 1935 921 | 12 | 1.3 | — | 909 | 100.0 |
| | 1930 1,024 | 23 | 2.3 | 1 | 1,002 | 99.9 |

Table IX.—Other output of the Tobacco Trade

The value of the gross output of the firms whose returns were made on schedules for the Tobacco Trade was £121,960,000 in 1935 and £117,764,000 in 1930, of which £121,946,000 in 1935 and £117,764,000 in 1930 consisted of products included in Table V A. The balance of £14,000 in 1935 mainly represented sales of tobacco and cigarette-making machinery.

MATERIALS AND FUEL

Table X A.—Materials, fuel and electricity purchased and used

| Kind of materials, etc. | 1935 | | 1930 |
|---|----------|--------|----------|
| | Quantity | Cost | Cost |
| | Th. tons | £'000 | £'000 |
| Fuel and electricity used for all purposes :— | | | |
| Coal | 29.2 | 29 | } 87,309 |
| Coke | 4.2 | 6 | |
| Heavy fuel oil | 2,757 | 41 | |
| Purchased electricity | 16,099 | 73 | |
| All purchased materials and other fuel | ... | 93,431 | |
| TOTAL | ... | 93,580 | 87,309 |

Table X B.—Consumption of coal, coke and electricity

| Kind of fuel | 1935 | 1930 |
|-----------------------------------|---------------------|---------------------|
| | Th. tons | Th. tons |
| Coal | 29.2 | 23.4 |
| Coke | 4.2 | 3.3 |
| Electricity :— | Th. B.T.U. | Th. B.T.U. |
| Generated in same works | (Kw.-hrs.) 2,715 | (Kw.-hrs.) 2,320 |
| Purchased | 16,099 | 14,691 |
| Total electricity consumed | 18,814 | 17,011 |

EMPLOYMENT

Table XI A.—Average numbers employed

| Persons employed | Males | | Females | | Total | |
|--|----------|----------|----------|----------|----------|----------|
| | Under 18 | All ages | Under 18 | All ages | Under 18 | All ages |
| Operatives (average for the year) | 610 | 9,816 | 7,262 | 25,879 | 7,872 | 35,695 |
| Administrative, technical and clerical staff* | 749 | 10,375 | 8,770 | 29,227 | 9,519 | 39,602 |
| TOTAL | 1,359 | 20,191 | 16,032 | 55,106 | 17,391 | 75,297 |
| | 1935 | 1930 | 1935 | 1930 | 1935 | 1930 |
| | 782 | 14,862 | 7,427 | 27,997 | 8,209 | 42,859 |
| | 1,044 | 14,908 | 9,139 | 31,430 | 10,183 | 46,338 |

* As at 12th October, 1935, and 18th October, 1930.

Table XI B.—Operatives employed in one week in each month of 1930 and 1935 by firms furnishing returns in respect of the twelve months ended December

| Mid week of* | Operatives employed | | Monthly index† | |
|---|---------------------|--------|----------------|-------|
| | 1930 | 1935 | 1930 | 1935 |
| January | 10,287 | 9,671 | 103.5 | 95.4 |
| February | 10,386 | 9,812 | 104.5 | 96.8 |
| March | 10,668 | 9,838 | 107.3 | 97.1 |
| April | 10,803 | 9,834 | 108.7 | 97.0 |
| May | 10,825 | 10,116 | 108.9 | 99.8 |
| June | 10,912 | 10,067 | 109.8 | 99.3 |
| July | 10,971 | 10,211 | 110.3 | 100.7 |
| August | 10,985 | 10,154 | 110.5 | 100.2 |
| September | 11,459 | 10,384 | 115.3 | 102.5 |
| October | 11,410 | 10,430 | 114.8 | 102.9 |
| November | 11,675 | 10,522 | 117.4 | 103.8 |
| December | 11,970 | 10,583 | 120.4 | 104.4 |
| Average for the twelve months | 11,029 | 10,135 | 110.9 | 100.0 |
| Proportion of total operatives represented | 27.85 | 28.39 | ... | ... |

* For the ending date of each week see page xiv.

† Based on the estimated average for the year 1935.

Table XI C.—Average numbers employed, 1924-1935

| Year | Operatives | Administrative, technical and clerical staff | Total |
|-------------|------------|--|--------|
| 1924 | 35,869 | 4,598 | 40,467 |
| 1930 | 39,602 | 6,736 | 46,338 |
| 1935 | 35,695 | 7,164 | 42,859 |

WAGES

Table XII.—Wages paid by firms furnishing returns of wages

The aggregate amount of wages paid by firms furnishing returns of wages was £4,139,000 in 1935 representing 15.1 per cent. of the net output of these firms, the corresponding figures for 1930 being £4,119,000 and 14.5 per cent. The figures for these firms given below indicate the size of the sample and the extent to which it is representative.

| Firms furnishing returns of wages | 1935 | | 1930 | |
|---|-----------|---------------------|-----------|---------------------|
| | Aggregate | Proportion of trade | Aggregate | Proportion of trade |
| | £'000 | Per cent. | £'000 | Per cent. |
| Gross output... .. | 118,493 | 97.2 | 107,704 | 91.2 |
| Net output | 27,472 | 96.8 | 28,379 | 93.2 |
| Operative staff employed :— | No. | | No. | |
| During mid-week of October :— | | | | |
| Males | 9,383 | 94.1 | } | * |
| Females... .. | 24,291 | 92.4 | | |
| Total | 33,674 | 92.9 | 34,125 | 89.6 |
| Average for the year | 33,281 | 93.2 | 33,825 | 90.0 |
| Administrative, technical and clerical staff | 6,632 | 92.6 | * | * |
| Number of establishments | 89 | 75.4 | ... | ... |

* Not recorded separately.

COUNTRY TABLES (1935)

Note.—The figures given in the following tables relate only to firms whose returns were made on schedules for the Tobacco Trade.

Owing to the possible disclosure of information relating to individual firms, separate particulars for Northern Ireland cannot be given.

Table I.—General summary

| Particulars | Unit | England and Wales and Northern Ireland | Scotland | United Kingdom |
|---|-------|--|----------|----------------|
| Value of products (Gross output) ... | £'000 | 119,310 | 2,650 | 121,960 |
| Cost of materials, fuel and electricity used | " | 91,434 | 2,146 | 93,580 |
| Net output | " | 27,876 | 504 | 28,380 |
| Average number of persons employed... .. | No. | 41,033 | 1,826 | 42,859 |
| Net output per person employed | £ | 679 | 276 | 662 |
| Number of returns | No. | 103 | 6 | 109 |
| Number of establishments | " | 111 | 7 | 118 |

Table II.—Output

| Kind of output | Unit | England and Wales and Northern Ireland | Scotland | United Kingdom |
|---|----------|--|----------|----------------|
| Manufactured tobacco :— | | | | |
| Cigars... .. | Th. lbs. | 1,071 | — | 1,071 |
| Cigarettes | £'000 | 1,254 | — | 1,254 |
| Cavendish or negrohead | Th. lbs. | 152,627 | 560 | 153,187 |
| Other manufactured tobacco | £'000 | 96,200 | 404 | 96,604 |
| Snuff for human use | Th. lbs. | * | * | 1,094 |
| Stalks, shorts or other refuse of tobacco, including offal snuff, sold | £'000 | 46,140 | 4,187 | 268 |
| Other goods | £'000 | 23,014 | 2,240 | 50,327 |
| Work done | £'000 | * | * | 23,254 |
| TOTAL | £'000 | 119,310 | 2,650 | 121,960 |

* Owing to the possible disclosure of information relating to individual firms, separate particulars cannot be given.

† Amount received.

Table III A.—Materials, fuel and electricity purchased and used

| Kind of materials, etc. | Unit | England and Wales and Northern Ireland | Scotland | United Kingdom |
|---|------------------------------|--|----------|----------------|
| Fuel and electricity used for all purposes :— | | | | |
| Coal | <i>Th. tons</i> | 27.2 | 2.0 | 29.2 |
| | <i>£'000</i> | 27 | 2 | 29 |
| Coke | <i>Th. tons</i> | 4.2 | — | 4.2 |
| | <i>£'000</i> | 6 | — | 6 |
| Heavy fuel oil | <i>Th. galls.</i> | 2,757 | — | 2,757 |
| | <i>£'000</i> | 41 | — | 41 |
| Purchased electricity | <i>Th. B.T.U. (Kw.-hrs.)</i> | 15,455 | 644 | 16,099 |
| | <i>£'000</i> | 70 | 3 | 73 |
| All purchased materials and other fuel | <i>£'000</i> | 91,290 | 2,141 | 93,431 |
| TOTAL | <i>£'000</i> | 91,434 | 2,146 | 93,580 |

Table III B.—Consumption of electricity

| Electricity consumed | England and Wales and Northern Ireland | Scotland | United Kingdom |
|--------------------------------|--|------------------------------|------------------------------|
| | <i>Th. B.T.U. (Kw.-hrs.)</i> | <i>Th. B.T.U. (Kw.-hrs.)</i> | <i>Th. B.T.U. (Kw.-hrs.)</i> |
| Generated in same works | 2,715 | — | 2,715 |
| Purchased | 15,455 | 644 | 16,099 |
| TOTAL | 18,170 | 644 | 18,814 |

Table IV A.—Numbers employed in week ended 12th October, 1935

| Persons employed | Males | | Females | | Total | |
|---|----------|----------|----------|----------|----------|----------|
| | Under 18 | All ages | Under 18 | All ages | Under 18 | All ages |
| England and Wales and Northern Ireland :— | | | | | | |
| Operatives | 603 | 9,744 | 6,870 | 24,979 | 7,473 | 34,723 |
| Administrative, etc.*... .. | 171 | 4,857 | 149 | 1,993 | 320 | 6,850 |
| Total | 774 | 14,601 | 7,019 | 26,972 | 7,793 | 41,573 |
| Scotland :— | | | | | | |
| Operatives | 17 | 227 | 500 | 1,301 | 517 | 1,528 |
| Administrative, etc.*... .. | 1 | 189 | 16 | 125 | 17 | 314 |
| Total | 18 | 416 | 516 | 1,426 | 534 | 1,842 |
| United Kingdom :— | | | | | | |
| Operatives | 620 | 9,971 | 7,370 | 26,280 | 7,990 | 36,251 |
| Administrative, etc.*... .. | 172 | 5,046 | 165 | 2,118 | 337 | 7,164 |
| TOTAL | 792 | 15,017 | 7,535 | 28,398 | 8,327 | 43,415 |

* Administrative, technical and clerical staff.

Table IV B.—Operatives employed in one week in each month of 1935

| Week ended | Males and females | | |
|--------------------------------------|--|----------|----------------|
| | England and Wales and Northern Ireland | Scotland | United Kingdom |
| January 19 | 33,639 | 1,499 | 35,138 |
| February 16... .. | 33,678 | 1,497 | 35,175 |
| March 16 | 33,662 | 1,497 | 35,159 |
| April 13 | 33,653 | 1,500 | 35,153 |
| May 18 | 34,010 | 1,505 | 35,515 |
| June 15 | 33,961 | 1,514 | 35,475 |
| July 13 | 34,301 | 1,509 | 35,810 |
| August 17 | 34,221 | 1,547 | 35,768 |
| September 14 | 34,456 | 1,533 | 35,989 |
| October 12 | 34,723 | 1,528 | 36,251 |
| November 16 | 34,722 | 1,496 | 36,218 |
| December 14 | 35,168 | 1,518 | 36,686 |
| Average for the twelve months | 34,183 | 1,512 | 35,695 |

Table V.—Firms employing not more than ten persons on the average

| Particulars | England and Wales and Northern Ireland | Scotland | United Kingdom |
|---------------------------------------|--|----------|----------------|
| | No. | No. | No. |
| Number of returns received | 68 | 8 | 76 |
| Average number of persons employed :— | | | |
| Males... .. | 169 | 12 | 181 |
| Females | 203 | 20 | 223 |
| Total | 372 | 32 | 404 |