

HIGHLIGHT



The House Magazine of
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Tanner's Quarterly Trade Journal

We promise in this issue not to devote much space to Postal affairs, but we must make a few comments following the publication of the Carter Report.

This is a fine analytical summary of the Post Office and its problems, and we recommend anyone interested to purchase a copy from Her Majesty's Stationery Office. Of course like all Government Departments you telephone three numbers before you get the one which deals with what you require. You give your order and a fortnight later nothing has happened, although they promised to put a copy in the post forthwith.

What does the Carter report say? Fundamentally it suggests the splitting of the Post and Telecommunications into quite separate units. We have always been rather frightened at this suggestion, sensible as it may be, because by division it means two Boards, two overheads, and this is bound to ricochet on to the poor relation, posts. The administrative labour costs per unit of business has already risen from an index figure of 100 in 1965/66 to 822 in 1975/76, whilst the mails operation labour cost has risen from 100 in 1965/66 to 390 in 1975/76. This merely highlights the huge increase in bureaucracy which has attacked the Post Office in the last decade.—They always state that they are a labour intensive industry, but we wonder where the intensity really lies:—

The report also picks up one of our favourite hobby horses POUNC. They agree that this body is largely ineffectual because it is never used correctly merely being called upon to report after decisions are made and Ministers have rarely taken any notice of its recommendations. The new idea is to form a Council overall the Post and Telecommunications and responsible to the Secretary of State. POUNC members would form the Consumer members of this Council. This is exactly what we have always suggested.

The main criticism of the Postal services is summed up in one sentence "However, we think that the Post Office sees itself primarily as a production-oriented organisation—sometimes its customers

get the feeling that they are being graciously permitted to use the systems”.

The report is highly critical of its marketing and customer relations. They know too little about their customers and do not discuss with them the implications of its forward plans.

To this we merely say “Hear, hear.”

We like another paragraph which reads:—

“The bad habits include a tendency to defend established positions with the utmost tenacity, sometimes long after they have ceased to be defensible. This conveys to the customer of the Post Office an irritating impression that the Management is so sure that it is always right that it feels no need to conceive of the possibility of being mistaken. A less conservative administration, more ready to listen to its customers, would find it easier to experiment with gradual changes.”

Altogether a fascinating report. Let us hope that something will come of it, and it won't be side tracked into some obscure government pigeon hole.

Now due to retirements there is a completely new group of directors in charge of all facets of the postal services, and it is confidently felt that a changed outlook will follow. At least the marketing side is very ready to listen to suggestions and this is a great improvement on the past.

In Our Opinion . . .

There is little sign as yet of the upturn in demand for paper, and Mills are still running at reduced capacity. We in this Country are not alone, as practically every Mill throughout the World is not producing to maximum out-put.

As a result of this there is a wealth of dumping at uneconomic prices solely to keep large plants working to a reasonable level. With a capital intensive industry it is essential to maintain an output at least at 80% capacity, though in most Mills, apart from those

integrated pulp and paper mills, this level is insufficient to run at a reasonable profit.

Several of the integrated pulp and paper mills are able to show profits at considerably lower output figures, but this is due to the pulp side subsidising the paper making, hence the dumping of surplus tonnage into this Country.

In Great Britain the continuous increase in prices has at least temporarily ceased in spite of inflationary increases in costs, and this is due mainly to the improvement in the pound sterling, and the weakening of the dollar, as this has resulted in a cheapening of the pulp prices, which are fixed in dollars. Now we have the devaluation of the Swedish Kroner, and this again must eventually effect prices of pulp and paper.

Two other aspects have helped to stop increases and in fact show slight decreases in certain grades, and those are the large increased imports of paper from overseas referred to above at prices considerably lower than home produced paper. The second cause is the large amount of surplus pulp which is being sold as spot lots outside the normal contracts at most attractive prices.

Whilst we anticipate a slow recovery in demand during the next few months, we consider that we are not likely to see much change in prices, and this is exactly what this industry requires. A lengthy period of stability is what we have been hoping for throughout this year, and it looks very much as if we shall get it, unless there is a complete breakdown in the so called stage three wages settlement.

There is still a shortage of waste, as more and more Mills turn to this source of raw material to help contain their costs.

Large quantities are having to be imported, at a time when many district councils have ceased to bother to collect waste paper separately. At the current prices now offered, it must be beneficial to collect all the waste possible. Having got the public out of the habit of segregating waste paper, however, it does take a lengthy period to re-educate them again. The future demand is now assured, as far more Mills in this Country realise that their only salvation as producing units is to adulterate their pulp with waste. In fact several Mills have virtually turned over to making re-constituted paper only, and being quite successful at it. This policy can only grow, so the waste future is now assured.

SARUM WHITE BANK

50 gm²

		under 100,000	over 100,000
A4	210 × 297 mm	1.65	1.59
		under 25,000	over 25,000
RA2	430 × 610 mm	6.27	5.99
SRA2	450 × 640 mm	6.88	6.59
Large Post	420 × 535 mm	5.59	5.39

£'s per 1,000 Sheets plus V.A.T.

TANNERS FOR PAPER

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Concerning ourselves and you

Under the direction of our new Commercial Manager Mike Kerlogue, we have been analysing ourselves and carrying out a complete review of our stock lines and the service which we are able to offer.

The paper trade has changed very considerably over the last few years, and is still changing, and it is advantageous to stand back occasionally and review the situation. What is new; what is improved; what do customers want; what sort of delivery do we offer and can this be improved?

We think you will find that we are able to show that we have the answers to these points, by the addition of several new lines of quite remarkable value. We have never been a company to indulge in cheap shoddy goods, although from time to time we offer special lines which come on the market, but we feel that the average printer wants regular supplies of good paper at competitive prices, and this is precisely what we are now offering.

Also he requires it in a reasonable time, generally from stock lines in 24/48 hours within our delivery area. To this end we are increasing our fleet of vehicles and at the same time giving a greater and more frequent coverage of this area, and gradually expanding it. Those of you in London and the Home Counties will already have noticed the improvement, and we intend to better this still further.

The two bread and butter lines which we are now getting into stock are really first class value and will be very hard to better:—

Sarum White Bank details of which are shown opposite has been in short supply, but we are pleased to say that we have now secured good stocks, and are hopeful of regular supplies.

Sarum White Multipurpose is a real winner, quality and price wise. A sample folder is enclosed and we merely ask you to look at it and compare with any quality you are at present buying. The new two tonne assorted rate must surely be worth close attention.

Further additions to our stock range are planned and we shall keep you informed as and when these take place.

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GOOD NEWS — REDUCED PRICES

KENTISH WHITE BOARDS

200 Microns—2 sheet

	<i>Under 6,000</i>	<i>6,000</i>	<i>12,000</i>
SRA2 — 450 × 640 mm.	£25-40	£23-60	£21-90
Royal — 520 × 640 mm.	£29-30	£27-30	£25-30
Postal — 570 × 370 mm.	£36-70	£34-10	£31-60
SRA1 — 640 × 900 mm.	£50-70	£47-20	£43-80

230 Microns—3 sheet

SRA2 — 450 × 640 mm.	£29-30	£27-20	£25-20
Royal — 520 × 640 mm.	£33-80	£31-50	£29-20
Postal — 570 × 730 mm.	£42-30	£39-40	£36-40
SRA1 — 640 × 900 mm.	£58-50	£54-50	£50-40

280 Microns—4 sheet

SRA2 — 450 × 640 mm.	£37-90	£35-30	£32-60
Royal — 520 × 640 mm.	£43-80	£40-80	£37-60
Postal — 570 × 730 mm.	£54-70	£51-00	£47-10
SRA1 — 640 × 900 mm.	£75-80	£70-50	£65-20

per 1,000 Boards — Packed 200's

Large stocks always maintained for immediate delivery

Tanners for Boards

VANGUARD TINTED BOARDS

Stocks are held at Crayford of the most popular colours in:—

Royal 52 × 64 cm 3 sheet 230 microns

SRA2 45 × 64 cm 3 sheet 230 microns

Royal 52 × 64 cm 4 sheet 300 microns

Postal 57 × 73 cm 4 sheet 300 microns

Other substances and sizes are also available

CROXLEY SCRIPT TINTED

In addition to a comprehensive range of Whites we are now stocking tinted in A4 — 70 gm² in

Pink, Green, Blue, Sunlight, Maize and Gold

TANNERS

for Paper and Boards

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Stamps for Pleasure— Paper and Watermarks

Paper is one of the essential commodities or materials of everyday life which most of us tend to take for granted. Without it there would be no books, no magazines or newspapers, no letters or stamps to post them (and no bills to pay!). The manufacture of paper is a highly skilled operation, and paper for postage stamps requires special attention—it has to be reasonably tough, it must be flexible enough to withstand the pressures of printing 'on the web' (in reels like cloth on the loom), and it must have a calendered surface suitable for printing by the appropriate process.

Compare the paper used for our low-value Machin definitives with that for the line-engraved high-value stamps—alas, now also being photogravure-printed—and you will realise that the different printing processes require different textures of paper. The low values are comparatively soft and smooth and, since about 1960, 'chalk-surfaced' (i.e. coated), while the engraved stamps have noticeably thin, tough paper, and tend to tear unevenly (with undesirable short and long perforation 'teeth') if one is not extremely careful. Many a post office clerk has unwittingly ripped off the perforations of a high-value stamp in removing it from the sheet!

Modern technology and the sophisticated methods of printing stamps have largely obviated the many problems that existed when paper, damped for the actual printing by lithography or line-engraved plates, expanded and then shrank in the drying process. The sheets of stamps often dried so unevenly (because paper expands more in one direction than the other, depending on the 'lay' of the fibres) that perforation was thrown out of its correct alignment, and spoilage was commonplace.

The first GB postage stamps of 1840—Penny Black and Two-pence Blue—were printed on handmade, deckle-edged paper manufactured by Stacey Wise of Rush Mills, Hardington, Northants, and varied considerably in thickness. The sheet was large enough to provide the equivalent of three sheets of 240 stamps, each having the requisite number of 'small crowns'—one to a stamp—comprising the watermark, arranged in 20 horizontal rows of 12 units to correspond with the printed stamps. Handmade paper continued in use, also for the Colonies who required individual watermark emblems, until about 1863.

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From December 1864, all the paper for the De La Rue GB surface-printed issues was machine-made by Turner & Co., Chafford Mills, Fordcombe, Kent, and coated or chalk-surfaced paper came into use with the British and Colonial issues of Edward VII—not only did it forestall attempts to clean off cancellations, when the design rubbed off as well, but it also improved the print quality.

Modern stamp paper is usually an evenly-grained wove, but even today there are many exceptions and differences in the paper which stem from the original method of manufacture, further complicated by the way the paper is presented to 'reel-fed' or 'sheet-fed' presses prior to printing. Some low-value Machin stamps show the marks of the parallel wires of 'laid' paper.

Among the many types of paper used in the production of stamps and postal stationery, one of the most distinctive was John Dickinson's silk thread paper. It is of especial interest because Dickinson also invented the machine, patented in 1809, on which the paper was made, strands of blue silk threads being embedded in the pulp during manufacture. This paper, intended as an alternative security measure where watermarks were impractical, was used for the famous Mulready envelopes, early stationery and the embossed 1s of 1847 and 10d of 1848.

Rowland Hill took elaborate precautions against forgery of his 'Blacks' and 'Blues', and the principal of these was the introduction of the watermark, 'a device or pattern formed within the paper by the dandy roller in the wet pulp stage of manufacture'. From that time there have been numerous types of watermark devices used in the production of British stamps, a practice which ceased in 1967.

The Small Crown of the first issues in 1840 was followed by the Large Crown, then came the Garters (in three sizes), the Emblems, Spray of Rose, Maltese Cross, Anchor and Orb, and lastly, in Queen Victoria's reign, the Imperial Crown. A novelty in 1870 was the script 'half penny' (extending over three stamps) as the watermark for Britain's first—and diminutive— $\frac{1}{2}$ d stamp.

The issues for Edward VII employed three watermarks—Imperial Crown, Anchor and Three Crowns in ascending order of value to the £1; while George V had his own Royal Cypher in single and multiple forms, establishing a standard pattern which continued through the reigns of Edward VIII and George VI to the Elizabethan issues. Multiple watermark emblems relieved the printers of precise registration and the ultimate was reached with the introduction, in 1958, of the Multiple Crowns watermark for definitives and special stamps.

A watermark is defined as an 'impression' in the paper, but philatelists know that on some stamps the watermark may be difficult or impossible to distinguish for a variety of reasons—an intense concentration of cellulose in the paper, the paper being too wet when impressed by the dandy-roller or faulty adjustment of the roller itself. The correct identification of watermarks is important when it involves the relative values of the stamps. For example, the first Wilding definitives of 1952-54 with the Tudor Crown watermark and the second issue of 1955-58 bearing the St. Edward's Crown watermark are worth considerably more than the Multiple Crowns' stamps of 1958-65.

There are mechanised aids to watermark detection, but the time-honoured method is the use of so-called 'benzine'—actually petroleum ether—with a dropper and tray. The stamp is laid face down on the tray and enough drops allowed to fall on the stamp to render it momentarily transparent before the fluid evaporates. Fortunately, most British stamps have easily visible watermarks if placed on a black background or held up to the light, so that it shines through.

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New Members

We welcome two new additions to our staff.

Alan Herriott joins our Leeds branch as representative in the Tyne & Wearside, Teesside and North Yorkshire area. Born and bred a Geordie, Alan has considerable experience in our trade, both in buying and selling, so we are confident that he will be of much assistance to our customers in that area.

Bill Walford rejoins the Company, after a spell on the road for Geo. Waterston & Sons Limited. Many of our customers will recall Bill when he was for several years one of our inside staff on stock sales. He will be taking over the West London area previously looked after by Paul Dalton, who has now been promoted to Stock Sales Manager.

Envelope News

On 15th August the prices of our Envelopes and Pockets were increased as forecast in the last issue of our Journal. The rise in prices was very small and really only takes into account the additional cost of distribution.

As usual our problem is keeping up with the demand for our grades. In the larger pockets this demand appears insatiable, which we believe is more than many of our competitors can say.

Whilst we would never be bold or stupid enough to run down our opposition, we can truthfully say that the demand continues to increase at a time of diminishing sales in the industry. There must be an answer and in our opinion it is in the various qualities we market. This range covers virtually every grade required by any Commercial business at every possible price range.

We wish we were not out of stock so frequently, and we are pulling out all the stops to improve the position. However one must admit that at a time of tough competition and shortage of orders, it is not a bad position to be in.

Amended price lists are being taken round by our representatives as quickly as possible.

As a result of demand we are putting into stock two new lines of envelopes:—

CRAYSEAL D.L. Self-Seal Wallets, Opaque printed and HIGHLIGHT Opaque printed D.L. Bankers.

Details of these are printed in our pages of advertising, and samples will be readily available from our representatives or on application to our Crayford or Leeds offices.

We are certain that both lines will be highly popular as they are excellent quality at attractive prices.

Two new Envelope qualities

CRAYSEAL D.L. 110×220 mm

A high quality White Opaque Printed Self-Seal Wallet.

Smalls	5,000	10,000	25,000	50,000	100,000
£8.85	£8.35	£7.80	£7.50	£7.40	£7.30

HIGHLIGHT OPAQUE D.L. 110×220 mm.

A good quality banker envelope, opaque printed.

Smalls	5,000	10,000	25,000	50,000	100,000
£6.45	£6.10	£5.70	£5.46	£5.38	£5.30

All per 1,000 Plus V.A.T.

TANNERS *for Envelopes*