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Business Monitor

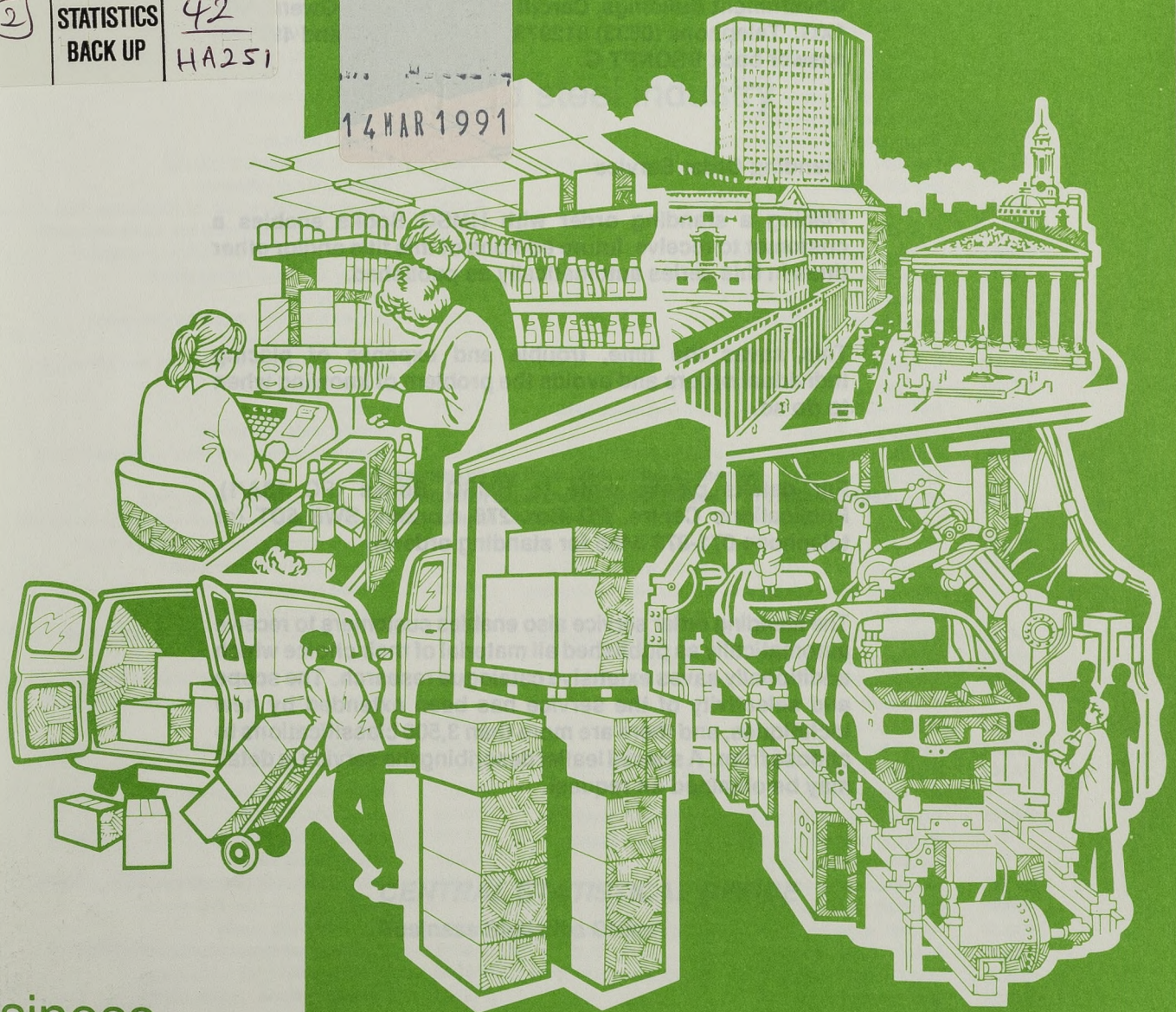
Report on the Census of Production

Iron and steel industry

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PA221

BUSINESS MONITOR

A publication of the Government Statistical Service

Report on the Census of Production 1989

Iron and steel industry

Presented by the Chancellor of the Exchequer
to Parliament in pursuance of the Statistics of Trade Act 1947
(10 & 11 Geo.6 Cha.39 sec 7)

CENTRAL STATISTICAL OFFICE

Business Statistics Office

London: Her Majesty's Stationery Office

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PA221 IRON AND STEEL INDUSTRY

PA221A9

The information in this report relates to businesses classified to the Iron and steel industry, Group 221 in the Standard Industrial Classification Revised 1980. The industry Group covers the following Activity Heading:-

2210 Iron and steel industry

(Note: Iron and steel industry as defined by the European Coal and Steel Community in the Treaty of Paris 1951). Units producing iron and steel products described in Annex 1 to the Treaty. This includes the manufacture of pig iron, spiegeleisen, high-carbon ferromanganese, primary liquid steel for casting, steel ingots for remelting and forging, semi-finished products such as blooms, billets, slabs and bars, hot rolled wide coils other than finished products, hot finished products such as rails, sleepers, sole-plates, joists, heavy sections 80 mm and over, sheet piling bars and sections of less than 80 mm and flats of less than 150 mm, wire rod, tube rounds and squares, hot-rolled hoop and strip, hot-rolled sheets under 3 mm, flats and sheets of 3 mm thickness and over, and universal plates of 150 mm and over. The manufacture of coated products, eg tinplate, blackplate, galvanized sheets is also included as well as cold rolled sheet under 3 mm, electrical sheet and strip for tinplate. Subsequent work on the same site such as tube making, other cold forming, casting and forging should be separately identified and classified to Groups 222, 223, 311 or 312 as appropriate.

For a full description of the 1980 classification see Standard Industrial Classification Revised 1980, obtainable from Her Majesty's Stationery Office, price £4.25.

In interpreting the data in the tables it is essential to bear in mind the notes and definitions which commence on page 5

In 1987, for a number of administrative and practical reasons, a new system of company-based reporting was introduced. Under the new system the reporting unit is the census unit, generally the company, but there are some exceptions. In some cases, for example, for large steel works, separate units were created to make reporting more to the census for each of their production activities as an establishment basis. Through this monitor the nature of reporting shifts and referred to as "businesses". These businesses are no longer asked to provide production activities.

In practice, since most businesses, both before and after the change, reported for the company as a whole, little difference in the main statistical data has resulted from the change.

For most businesses, the returned data are appropriate to a single activity heading of SIC80 and fall within a single geographical region. Where information covers a mixture of activities, the business is classed according to the main activity. Where the business operates at a number of different addresses, then, in order to match regional data to be reported, separate information on employment and capital expenditure is sought for each address.

THE REGISTER

A register of businesses throughout the United Kingdom is held on the ISO computer and provides the basis for ISO inquiries. For each business the register contains identification particulars and information that is eligible for inclusion in an inquiry. In relation to other businesses in common ownership, its industrial classification, the nature of its output and location indicators for regional analysis.

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17. Figures which would be likely to disclose particulars relating to an individual undertaking are not published unless the contributor has given written consent for their publication.

CHANGES MADE FOR 1989

18. The 1989 Census was a benchmark one with a larger number of businesses receiving inquiry forms than had been the case with the previous 4 Censuses. Additional questions, for larger businesses only, asked for information on road transport costs and postal and telecommunications costs. The questions relating to computer costs included in the 1988 Census, were discontinued, but those relating to the cost of assets leased under the finance leasing arrangements were retained.

SYMBOLS USED

19. The following symbols are used throughout the PA series of Business Monitors:

- .. not available
- nil or less than half the final digit shown
- * information suppressed to avoid disclosure
- R revised

ROUNDING OF FIGURES

20. Figures in the tables have been rounded to the nearest final digit where necessary and, in these instances, the sum of the constituent items may not always agree exactly with the total shown.

EXPLANATION OF TERMS USED IN THE CENSUS REPORT

21. The notes and definitions given in this section are based on the instructions given to respondents as to the way in which returns were to be completed.

CAPITAL EXPENDITURE

22. This represents the value charged to capital account together with any other amounts which ranked as capital items for taxation purposes during the year to which each return related. From 1988 contributors were asked to include the value of assets acquired as lessees under finance leasing arrangements. The value is inclusive of any amounts received or expected to be received in grants and/or allowances from government sources, statutory bodies or local authorities. Capital expenditure during the year in respect of production units where production had not started before the end of the year and the value of CAPITAL GOODS PRODUCED FOR USE WITHIN THE BUSINESS by its own staff are included. The value of any assets acquired in taking over an existing business is excluded. The figures include non-deductible VAT but exclude deductible VAT. No allowance is made for depreciation, amortisation or obsolescence.

a. on LAND AND EXISTING BUILDINGS

23. This represents the value of freeholds and the value or premium payable or receivable for leaseholds acquired or disposed of. The figures for acquisitions include architects' and surveyors' fees, legal fees, stamp duties, agents' commissions and Land Registry fees. The figures for disposals are net of any such professional fees payable.

b. on NEW BUILDING WORK

24. This represents the value of new building and other constructional work such as the extension and reconstruction of old buildings, and the value of any newly constructed buildings acquired. The figures include architects' and surveyors' fees, legal fees, stamp duties, agents' commissions and Land Registry fees.

c. on PLANT AND MACHINERY, VEHICLES

25. This represents the value of new and second-hand plant and machinery and vehicles acquired or disposed of. The figures for acquisitions are net of any discounts received but include the cost of transport and installation and Customs and Excise car tax. The figures for disposals exclude amounts written off for capital assets which are scrapped.

CAPITAL GOODS PRODUCED FOR USE WITHIN THE BUSINESS

26. This represents the value of all work of a capital nature carried out during the year by the staff of, and for use in, the businesses covered by the returns.

COST OF INDUSTRIAL SERVICES RECEIVED

27. This includes amounts payable to other organisations for work done on materials supplied by the business completing the return, for repairs and maintenance including those in respect of rented buildings, and for contracts which have been sublet. Direct payments to outworkers and amounts charged to capital account are excluded.

COST OF NON-INDUSTRIAL SERVICES RECEIVED

28. Up to 1987 contributors were asked to include annual payments for assets acquired on a finance leasing basis. From 1988 they were asked to include the total value of such assets as capital expenditure during the year in which they were acquired. The cost of non-industrial services received includes commercial insurance premiums, bank charges and amounts payable to other organisations for the hire of vehicles, plant and machinery, for the rent of industrial and commercial buildings, for the services of accountants, auditors, agents, solicitors and surveyors other than in connection with the acquisition or disposal of capital assets, for postal and telecommunications services, for carriage by all forms of transport within the United Kingdom, for advertising, market research etc. for the right to use patents, trade marks, copyrights etc. for manufacturing and quarrying rights and technical know-how. Interest payments and amounts payable for sea and air freight on goods exported and on materials and fuel imported are excluded.

EMPLOYERS' NATIONAL INSURANCE CONTRIBUTIONS ETC.

29. This includes employers' national insurance contributions under the Social Security Pensions Act 1975, commercial insurance premiums for policies providing pensions, superannuation or other retirement benefits, sickness benefits, personal accident benefits, disability benefits or death benefits for employees, including former employees, or their dependants. Also included are contributions to canteens, social centres, children's and holiday homes etc. and the cost of supplying luncheon vouchers.

EMPLOYMENT

30. This is the average number of ADMINISTRATIVE, TECHNICAL AND CLERICAL EMPLOYEES and OPERATIVES on the payroll and the number of WORKING PROPRIETORS employed during the year of return. Full-time and part-time employees are included but outworkers (ie people who worked in their own homes on materials supplied by the business) and casual employees such as jobbers are excluded. The average number of employees returned by individual businesses may have been calculated by, for example, the average of the number of employees on the payroll for the last week of each calendar month.

a. ADMINISTRATIVE, TECHNICAL AND CLERICAL EMPLOYEES

31. This includes directors who received a definite wage, salary or commission, managers, foremen, draughtsmen, editorial and advertising staff, travellers, all office employees and research and design employees except operatives.

b. OPERATIVES

32. This includes all manual wage earners including operatives in power stations, operatives engaged in outside work of erecting, fitting etc, inspectors, maintenance workers and cleaners. Staff engaged in transport (including roundsmen) and employed in warehouses, stores, shops and canteen are included.

c. WORKING PROPRIETORS

33. These are people who are regarded as self-employed for national insurance purposes, members of their families who worked in the business without receiving a definite wage or salary for at least half the normal working hours and directors who worked in the business but did

not receive a definite wage, salary or commission. Part-time Directors paid by fee only and directors who received a definite wage, salary or commission are excluded.

ENTERPRISE

34. This is defined as one or more businesses under common ownership or control.

GROSS OUTPUT

35. This is calculated by adjusting the value of TOTAL SALES AND WORK DONE by the changes during the year of WORK IN PROGRESS and GOODS ON HAND FOR SALE.

GROSS VALUE ADDED AT FACTOR COST

36. This is calculated by deducting from NET OUTPUT the COST OF NON-INDUSTRIAL SERVICES RECEIVED, RATES and the cost of LICENSING OF MOTOR VEHICLES. This estimate of gross value added approaches more closely than NET OUTPUT the definition of net output or value added in national accounts statistics.

GROSS VALUE ADDED AT FACTOR COST PER HEAD

37. This is calculated by dividing GROSS VALUE ADDED AT FACTOR COST by total EMPLOYMENT.

NET CAPITAL EXPENDITURE

38. This is calculated by adding to the value of NEW BUILDING WORK acquisitions less disposals of LAND AND EXISTING BUILDINGS, VEHICLES and PLANT AND MACHINERY.

NET OUTPUT

39. This is calculated by deducting from GROSS OUTPUT the cost of PURCHASES OF MATERIALS FOR USE IN PRODUCTION AND PACKAGING AND FUEL and PURCHASES OF GOODS FOR MERCHANTING OR FACTORING, the COST OF INDUSTRIAL SERVICES RECEIVED and is adjusted for net duties and levies etc. where applicable. Purchases are adjusted for changes during the year of STOCKS OF MATERIALS, STORES AND FUEL.

NET OUTPUT PER HEAD

40. This is calculated by dividing NET OUTPUT by total EMPLOYMENT.

NON-INDUSTRIAL SERVICES RENDERED

41. This includes amounts charged for the hire of vehicles, plant and machinery, for the rent of industrial and commercial buildings, for the right to use patents, trade marks, copyrights etc. for manufacturing and quarrying rights, for technical know-how and for the provision of transport to other organisations. It also includes revenue from staff facilities such as canteens.

OPERATING RATIOS

42. These ratios are calculated using industry totals, ie including the estimates for businesses not responding to or not selected for the Census. Respondents are able to compare the ratios for their own businesses with those for the industry as a whole.

PURCHASES OF MATERIALS FOR USE IN PRODUCTION, AND PACKAGING AND FUEL. PURCHASES OF GOODS FOR MERCHANTING OR FACTORING

43. These include the cost of raw materials, components, semi-manufactured goods and workshop materials, replacement parts and consumable tools not charged to capital account, packaging materials of all types, stationery and printed matter, fuel, electricity and water, materials of all types used by the business or given out to others, for the production of machinery or other capital items used in the business, and materials used when working on goods supplied by customers. The figures exclude VAT, purchases of machinery and plant, which are included in CAPITAL EXPENDITURE, and amounts payable to transport firms or credited to the business's own transport departments for delivery of materials. The figures are net of the value of goods or packaging materials returned to suppliers and trade discounts receivable. Materials purchased duty-paid are included at their duty-paid value less drawbacks, rebates etc. Imported goods are included at their full delivered

cost. If the transport from docks or airport of imported goods is not included in the cost of goods purchased, the cost is entered at cif plus duty, if applicable. Transfers of goods from other departments of the business not covered by the return are included at the estimated selling value recorded by the other departments.

REMUNERATION PAID TO OUTWORKERS

44. This represents amounts paid to outworkers, ie people who do work in their own homes generally on a piece-work basis, whose names appear on the payroll. Amounts paid to outworkers by subcontractors are included in the COST OF INDUSTRIAL SERVICES RECEIVED. Estimates are not made for remuneration of outworkers for businesses not completing Census returns.

SALES OF GOODS PRODUCED

45. This represents sales of goods during the year, whether or not they were produced in the year of the return. It also includes sales of goods made from materials given out to other firms or to outworkers and sales of waste products and residues. The value of sales is the 'net selling value', ie the amount charged to customers whether values 'ex-works' or 'delivered' less VAT, trade discounts, agents' commissions etc and allowances on returned goods. Where products attract Excise duty, the value includes duty if the goods are sold 'duty-paid', but excludes it if they are sold in bond or exported. The cost of packaging materials less allowances for returnable containers is included. Sales of fixed assets and exceptional receipts are excluded. Transfers of goods produced by a business to departments not covered by the return (including other businesses in the same enterprise group) are treated as sales, valued as if sold to an independent purchaser.

STOCKS

46. This represents the value of goods on hand for sale, including goods for merchandising or factoring and of materials, stores and fuel held by businesses, whether held in the United Kingdom or abroad. Values include any duty payable but exclude VAT.

WAGES AND SALARIES

47. This represents amounts paid during the year to ADMINISTRATIVE, TECHNICAL AND CLERICAL EMPLOYEES and to OPERATIVES. All overtime payments, bonuses, commissions, holiday pay and redundancy payments, less any amounts reimbursed for this purpose from government sources, are included. No deduction is made for income tax or employees' national insurance contributions etc. Payments to WORKING PROPRIETORS, payments in kind, travelling expenses, lodging allowances etc. and EMPLOYERS' NATIONAL INSURANCE CONTRIBUTIONS ETC. are excluded.

WORK DONE AND INDUSTRIAL SERVICES RENDERED

48. This includes amounts charged for work carried out including that done by sub-contractors on customers' materials and amounts charged for materials supplied in the course of such work. Industrial services such as repairs and maintenance, installation work and technical research and studies rendered to other organisations is also included. For certain industries this heading covers a wide variety of activities, for example, butter packed on commission in the food industries, making up of garments, fur dressing and textile finishing in the textile industries, and preparatory work on typesetting, block making and binding in the printing and publishing industries. Work done is an important part of the activities of the electrical machinery and heavy engineering industries, and includes erection, installation and repair and jobbing work.

WORK IN PROGRESS

49. This represents materials which have been partially processed and are awaiting further processing before being sold or transferred. Progress payments made to sub-contractors are excluded and progress payments received from other organisations are not deducted.

TABLE 4

Employment, labour costs, output, net capital expenditure and stocks and work in progress by size of total employment, 1989

All United Kingdom businesses classified to the industry (a)

Size group	Busin- esses	Enter- prises (b)	Employment			Wages and salaries (c)			
			Total including working proprietors	Opera- tives	Admini- strative, technical and clerical	Operatives		Administrative, technical and clerical	
						Total	per head	Total	per head
Number	Number	Thousand	Thousand	Thousand	£ million	£	£ million	£	
1-49	4	4	0.1						
50-99	4	3	0.3	0.3	0.1	4.2	12,672	1.4	14,351
100-199	13	10	1.9	1.5	0.5	18.0	12,064	6.3	13,916
200-Plus	31	13	52.3	36.4	15.9	554.6	15,214	250.9	15,810
Total	52	26	54.7	38.3	16.4	576.8	15,069	258.6	15,749

- (a) Businesses employing fewer than 20 persons are not required to complete census returns. Because of this, data for these businesses should be regarded merely as the best estimates available and used with caution.
- (b) The count of enterprises shown in each row represents the number of enterprises, irrespective of size, owning the businesses shown in each size group. Because an enterprise may own businesses in more than one size group, the sum of individual enterprise counts may exceed the total for the industry.
- (c) The cost of employers' contributions to the national insurance, pensions and welfare schemes and the running costs of canteens are excluded from the table but were estimated for the industry at £145.5 million.
- (d) Net capital expenditure includes the value of assets acquired under finance leasing arrangements - see Table 2.
- (e) Gross value added data relate to businesses employing 1-199.

TABLE 5

Percentage analysis of twelve-month periods covered by returns received for the 1989 Census

Total sales and work done	Gross output	Net output	Gross value added at factor cost		Net capital expenditure (d)	Total stocks and work in progress at end of year
			Total	per head		
£ million	£ million	£ million	£ million	£	£ million	£ million
58.9	59.3	17.6	40,705	(e)	1.6	7.4
221.1	221.9	65.2	33,458	29,261(e)	2.3	28.0
6,689.2	6,636.0	2,607.4	50,390	41,871	424.0	1,061.6

(a) From 1988 contributors were asked to include as capital expenditure the value of assets acquired under finance leasing arrangements - see Table 2.

TABLE 5

PA221

Percentage analysis of twelve-month periods covered by returns received for the 1989 Census by number of returns and total employment

Accounting year ended	Percentage of total returns received	Percentage of total employment
1989		
April 6-30	2.1	-
May	-	-
June	-	-
July	-	-
August	-	-
September	6.4	1.1
October	-	-
November	2.1	0.3
December	34.0	20.4
1990		
January	2.1	0.3
February	2.1	-
1 March - 5 April	51.1	77.8

TABLE 6

Operating ratios, 1985-1989

All United Kingdom businesses classified to the industry

	Unit	1985	1986	1987	1988	1989
Gross output per head	£	83,378	82,462	102,834	121,155	126,457
Net output per head	£	25,718	28,989	40,211	47,765	49,181
Gross value added per head	£	20,275	23,383	33,774	40,515	41,280
Gross value added as a percentage of gross output	%	24	28	33	33	33
Ratio of gross output to stocks		5.2	5.1	5.8	6.1	6.3
Wages and salaries as a percentage of gross value added	%	53	49	39	35	37
Ratio of operatives to administrative, technical and clerical employees		2.5	2.4	2.4	2.4	2.3
Wages and salaries per operative	£	10,318	11,114	12,807	13,957	15,069
Wages and salaries per administrative, technical and clerical employee	£	11,573	12,300	13,460	15,087	15,749
Net capital expenditure per head (a)	£	3,158	4,628	5,223	6,195	7,822
Net capital expenditure as a percentage of gross value added (a)	%	16	20	16	15	19

(a) From 1988 contributors were asked to include as capital expenditure the value of assets acquired under finance leasing arrangements - see Table 2.

TABLE 7

PA221

Regional distribution of employment, net capital expenditure, net output and gross value added at factor cost, 1989
All United Kingdom businesses classified to the industry

Area	Total employment (a)		Net capital expenditure (b)		Net output (c)		Gross value added at factor cost (c)	
	Thousand	per cent of United Kingdom	£ million	per cent of United Kingdom	£ million	per cent of United Kingdom	£ million	per cent of United Kingdom
Standard regions of England								
North	8.7	15.8	84.5	19.7	504.7	18.8	430.9	19.1
Yorkshire and Humberside	19.5	35.7	118.0	27.6	729.0	27.1	584.4	25.9
East Midlands	0.1	0.2	0.2	-	3.3	0.1	2.8	0.1
East Anglia	-	-	-	-	-	-	-	-
South East	1.0	1.8	5.8	1.4	58.1	2.2	47.0	2.1
South West	-	-	-	-	-	-	-	-
West Midlands	1.6	2.9	9.4	2.2	73.8	2.7	60.5	2.7
North West	-	-	-	-	0.3	-	0.2	-
England	30.8	56.4	218.0	50.9	1,369.1	50.9	1,125.9	49.9
Wales	19.4	35.5	192.6	45.0	1,118.9	41.6	978.8	43.3
Scotland	4.5	8.1	17.3	4.1	202.2	7.5	153.3	6.8
Great Britain	54.7	100.0	427.9	100.0	2,690.2	100.0	2,258.0	100.0
Northern Ireland	-	-	-	-	-	-	-	-
United Kingdom	54.7	100.0	427.9	100.0	2,690.2	100.0	2,258.0	100.0

(a) Average number employed during the year, including full and part-time employees and working proprietors.

(b) New building work plus acquisitions less disposals of land and existing buildings, vehicles and plant and machinery. The value also includes assets acquired under finance leasing arrangements - see Table 2.

(c) Where a census return covered addresses in two or more regions, an estimate of the net output attributable to each address was made by assuming that net output was proportionate to employment. An estimate for each region was obtained by aggregating estimates of net output for addresses located in that region. Gross value added at factor cost was treated similarly.

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