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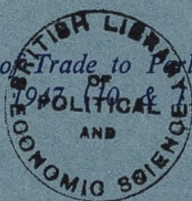
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*The Report on the
Census of Production
for 1954*

Volume 11: Industry B

LINOLEUM, LEATHERCLOTH AND ALLIED
INDUSTRIES

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



LONDON: HER MAJESTY'S STATIONERY OFFICE

1957

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The Report on the Census of Production for 1954

VOLUME 11, INDUSTRY B

LINOLEUM, LEATHERCLOTH AND ALLIED INDUSTRIES

THIS REPORT on the Linoleum, Leathercloth and Allied Industries relates to establishments engaged wholly or mainly in the manufacture of linoleum, felt base, leathercloth, oilcloth, oil baize, leatherette, etc.

This industry corresponds to minimum list heading 191 in the Standard Industrial Classification. There were no 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 producers 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 merchanting 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 merchanting 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 (a)
	1948	1951	1954		
	£ million	£ million	£ million	£ million	£ million
Gross output (production)	27.6	41.4	41.4	13.85	..
Net output	8.6	11.6	14.4	4.73	..
Total stocks and work in progress					
At beginning of year	7.0	10.5	10.4	4.73	..
Change during year	+ 1.9	+ 5.1	+ 1.5	+ .15	..
Capital expenditure less disposals (b)	1.3	1.1	1.3	.37	..
Wages and salaries	4.1	5.9	7.4	2.49	..
	Thousands	Thousands	Thousands	Thousands	Thousands
Total employment	12.2	14.6	15.5	5.75	..

(a) Owing to the risk of disclosure of information relating to individual firms, separate particulars cannot be given.

(b) Capital expenditure on new building work, plant, machinery and vehicles (including (except in 1948) that incurred 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 1948	United Kingdom	
			1951	1954
FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS				
Number of establishments	No.	28	33	29
Total value of sales and work done	£'000	26,440	38,385	40,510
Products on hand for sale	"	2,944	5,305	6,752
and work in progress	"	+ 1,496	+ 2,948	+ 815
Gross output (production) (a)	"	27,512	41,333	41,325
Purchases of materials and fuel	"	19,220	30,665	25,968
Stocks of materials and fuel	"	4,009	5,168	3,678
Cost of materials and fuel used	"	+ 411	+ 2,109	+ 654
Payment for work done on materials given out	"	18,809	28,556	25,314
Payment for transport (b)	"	148	238	391
	"	424	974	1,199
Net output	"	8,554	11,564	14,421
Average number of employees	No.	9,405	11,227	11,771
Total employment	"	2,750(c)	3,329	3,691
Net output per person employed	£	12,155	14,556	15,462
	"	704	794	933
Wages and salaries	£'000	2,794	4,165	5,181
	"	1,256	1,756	2,210
Capital expenditure				
New building work (d)	"	329	213	200
Plant and machinery	"	941	858	1,055
Vehicles	"	15	16	97
	"	32	40	113
	"	1	6	23
FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS				
Number of returns	No.	5	4	3
Total employment, including any working proprietors	"	17	14	22

(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) Excluding expenditure for establishments not yet in production.

Analysis by size, 1954

Larger establishments in the United Kingdom

TABLE 3

Average number employed	Estab-lish-ments	Gross output	Net output	Employees		Wages and salaries		Capital expenditure (a)	Net output per person employed
				Operatives	Others	Operatives	Others		
	Number	£'000	£'000	Number	Number	£'000	£'000	£'000	£
11 - 24	3	140	53	45	10	20	6	-	962
25 - 99	7	1,641	430	341	86	149	48	28	1,008
100 - 199	5	2,357	674	593	153	265	97	60	904
200 - 299	3	2,053	452	499	144	222	84	25	702
300 - 999	5	6,780	2,329	1,810	397	789	235	192	1,055
1,000 - 1,499	3	11,922	4,113	2,762	1,183	1,326	771	416	1,042
1,500 and over	3	16,433	6,370	5,721	1,718	2,410	968	649	856
Total	29	41,325	14,421	11,771	3,691	5,181	2,210	1,369	933

(a) 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 floor coverings	Remainder of the industry	Total
Number of establishments	No.	15	14	29
Total value of sales and work done	£'000	26,150	14,360	40,510
Sales of characteristic products	"	22,916		
Products on hand for sale and work in progress	{ at beginning of year + change during year	5,277 + 517	1,474 + 298	6,752 + 815
Gross output (production)	"	26,667	14,658	41,325
Purchases of materials and fuel	"	15,740	10,228	25,968
Stocks of materials and fuel	{ at beginning of year + change during year	2,299 + 269	1,379 + 385	3,678 + 654
Cost of materials and fuel used	"	15,471	9,843	25,314
Payment for work done on materials given out	"			391
Payment for transport	"	1,094	497	1,199
Net output	"	10,102	4,318	14,421
Average number of employees	{ operatives + others	8,796 2,437	2,975 1,254	11,771 3,691
Total employment	"	11,233	4,229	15,462
Net output per person employed	£	899	1,021	933
Wages and salaries	{ of operatives + of others	3,792 1,407	1,389 803	5,181 2,210
Capital expenditure				
New building work (a)	"	149	51	200
Plant and machinery	{ acquisitions (a) + disposals	696 82	359 15	1,055 97
Vehicles	{ acquisitions (a) + disposals	71 14	42 9	113 23

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

(51953)

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
	Th.sq.yds.	£'000	Th.sq.yds.	£'000	Number
Linoleum, whether on canvas or felt base backing					
Inlaid	23,496	8,484	36,267	11,221	9
Other	26,284	6,679	21,396	5,265	7
Felt base floor coverings	76,473	6,752	85,699	6,475	10
Leathercloth (fabric backed)					
Coated with polyvinyl chloride	16,341(a)	5,400(a)	30,166	8,552	18
Coated with linseed oil			2,649	460	..
Oil baize and oilcloth (fabric backed), leathercloth coated with nitro-cellulose, and leathercloth not elsewhere specified	..	8,555(a)	..	4,613	11
Cloth (other than leathercloth) coated with P.V.C., P.V.A. and other plastics materials	942	327	5
Waste products	..	55	..	25	9
Work done for the trade or on commission	..	178	..	221	10
Total		36,103(a)		37,157	..
Sales in other industries (see Table 6)		281(a)		861	..
Principal products of this industry sold by establishments in the industry		35,822(a)		36,296	25

(a) Corrected figure. The figure of £8,555,000 comprises:

	Th.sq.yds.	£'000
Leathercloth coated with nitro-cellulose	21,321	5,121
Oil baize and oilcloth (fabric backed), leathercloth coated with linseed oil, and leathercloth not elsewhere specified	..	3,434
		8,555

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	
	Th.sq.yds.	£'000	Number	
Leathercloth (fabric backed) coated with polyvinyl chloride	1,278	463	..	2R, 5G, 11A
Leathercloth (fabric backed) coated with nitro-cellulose, and cloth (other than leathercloth) coated with P.V.C., P.V.A. and other plastics materials	..	398	..	2R, 5G, 11A
Total		861		

(a) The volume number and industry references given are to the industries shown in the list at the back of this report.

(51953)

Sales in the industry of other than principal products: Larger establishments in the United Kingdom
TABLE 7

	1954	
	Quantity	Value
Goods sold	..	£'000 4,203
Electricity sold	Th.kWh. 2,976	11
Total		4,214

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.cwt.	£'000
Materials		
Linseed oil	751.3	2,846
Other drying oils	56.0	261
Cork	363.3	539
Wood flour	540.1	434
Pigments	998.0	2,049
Bitumen	776.1	464
Nitro-cellulose	20.9	252
Plasticisers	133.3	1,504
Gums and resins (other than synthetic)	145.8	336
Synthetic resins and moulding materials	209.9	2,040
Wastepaper and rags	774.4	530
Felt, impregnated	Th.sq.yds. 21,604.7	567
Woven piece goods, including canvas (excluding any used for packing purposes)		
Of cotton or mainly of cotton	76,300.1	6,053
Of jute or mainly of jute	68,720.3	3,212
Of other materials	..	69
Packing materials		
Of jute or hessian	2,192.8	93
Of other materials	..	567
All other purchased materials	..	2,943
Fuel and electricity	Th.tons	
Coal	223.9	727
Coke	11.9	35
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	257.5	49
Other	22.2	2
For burning in furnaces, boilers, kilns, etc.	3,949.8	150
Gas purchased	Th.therms	
From Gas Boards	234.9	14
From other sources, including other departments of the same firms	-	-
Electricity purchased (a)	Th.kWh	
From Electricity Boards	45,644	220
From other sources, including other departments of the firms	-	-
All other purchased fuel		11
Total Cost		25,968

(a) The total quantity of electricity generated in firm's own establishments in this industry in 1954 was 82,586 Th.kWh.

(51953)

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 (a)		
Operatives	11,227	11,771
Administrative, technical and clerical employees	3,329	3,691
Total	14,556	15,462
Wages and salaries paid to	£'000	£'000
Operatives	4,165	5,181
Administrative, technical and clerical employees	1,756	2,210
Total	5,921	7,391
Wages and salaries per head	£	£
Operatives	371	440
Administrative, technical and clerical employees	527	599
Superannuation and other pension funds for employees and dependents		£'000
Employers' contributions	..	180
Employees covered	..	Number 8,387
Pension, etc. payments to former employees and dependents	..	£'000 42

(a) The following persons, not included above, were also employed by larger establishments in this industry ("other workers" includes, for example, employees engaged in merchanting).

Canteen workers	9 Males	156 Females
Other workers	92 Males	99 Females

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

TABLE 11

	1951			1954		
	Males	Females	Total	Males	Females	Total
	Working proprietors	-	-	-	-	-
Operatives	9,881	1,312	11,193	10,225	1,905	12,130
Administrative, technical and clerical employees	2,311	1,186	3,497	2,491	1,362	3,853
Total employees	12,192	2,498	14,690	12,716	3,267	15,983

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

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