

141 Miscellaneous manufactures of paper and board

This Report on the Miscellaneous Manufactures of Paper and Board Industry relates to establishments engaged wholly or mainly in the printing of wallpaper (including coated wallpaper) and manufacturing paper, cardboard and papier maché goods, other than paper bags and multiwall paper sacks, stationery, cardboard boxes, cartons and fibre-board packing cases.

This industry corresponds to minimum list heading 484 in the Standard Industrial Classification (Revised 1968) which has been used for the first time as a basis of classification in the 1968 Census.

The industry formed part of the Miscellaneous Manufactures of Paper and Board Industry (Part 116) in the Reports on the last detailed Census of Production for 1963 corresponding to the sub-divisions 'Wallpaper' and 'Remainder of the industry'. The manufacture of paper bags and multiwall paper sacks and stationery included in the industry in the 1963 Report are now shown as separate Reports for 1968 as 'Packaging Products of Paper and Associated Materials (Other Than Board)' (Part 139) and Manufactured Stationery (Part 140) respectively.

Throughout this Report, the figures given for 1963 have been reclassified, as far as possible, according to the Standard Industrial Classification (Revised 1968) so that data for 1963 and 1968 are on the same industrial basis. However the reclassification of small firms, which provided limited information only, has been arbitrary.

In interpreting the data in the tables it is essential to bear in mind the notes and definitions which appear on pages (i) to (iv).

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(c) Including services rendered to other organisations (amounts charged for hiring out plant, machinery or other goods, for providing transport, or for technical or other services rendered).

(d) Administrative, technical and clerical employees.

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

(f) Acquisitions less disposals.TABLE 1 Industry summary, 1963 and 1968
United Kingdom (a) (b)

	Unit	All establishments		
		1963	1968	
Number of enterprises	No.	216	222	
Number of establishments	"	269	289	
Gross output	£'000	92,296	157,910	
Net output	"	41,753	72,202	
Net output per head	£	1,506	2,254	
Sales and work done	{ goods produced and work done (c)	£'000	85,511	152,594
	{ merchanted goods and canteen takings	"	5,881	4,104
Purchases	{ materials for use in production and packaging and fuel	"	43,433	79,534
	{ goods for merchenting and canteen purchases	"	4,948	3,211
Payments to other organisations	{ for work done on materials given out for transport	"	184	355
	{ by road	"	2,210	2,496
	{ by rail and other means excluding postal services	"			684
Stocks and work in progress	"			
Total stocks and work in progress	{ change during year	"	1,136	1,784
	{ at end of year	"	13,659	25,343
Goods on hand for sale	{ change during year	"	632	1,517
	{ at end of year	"	5,736	11,475
Work in progress	{ change during year	"	272	305
	{ at end of year	"	1,204	2,856
Materials, stores and fuel	{ change during year	"	232	572
	{ at end of year	"	6,719	11,013
Number employed on average during the year	{ total, including working proprietors	Th.	27.7	32.0
	{ operatives	"	21.3	25.2
	{ other employees (d)	"	6.2	6.6
Wages and salaries	{ of operatives	£'000	11,953	20,138
	{ of other employees (d)	"	5,570	7,913
Capital expenditure (e)	"			
Total	"	5,665	6,265	
New building work	"	1,426	1,238	
Land and existing buildings (f)	"	230	36	
Plant and machinery (f)	"	3,748	4,758	
Vehicles (f)	"	261	305	

(a) For 1968, estimates for establishments not making satisfactory returns and for small establishments, from which only employment data were collected, accounted for 10 per cent. of the total figures in which they were incorporated: of this, unsatisfactory returns accounted for 6 per cent. For 1963 the comparable figures were 7 per cent. and 4 per cent. respectively.

(b) The following information relates to small establishments (employing fewer than 25 persons) in this industry. It includes an estimate for small establishments not making satisfactory returns.

	1963	1968
Number of establishments	117	144
Average number employed:		
Working proprietors	} 884	138
Other persons employed		1,520

Footnotes continued on page 141/2.

TABLE 2 Analysis by size of establishment within the industry, 1968

(i) Output and employment

All establishments: United Kingdom

Number employed on average during the year by the establishment (a)	Estab-lish-ments	Enter-prises (b)	Total number employed on average during the year (a)	Gross output	Net output	Net output per head
	Number	Number	Number	£'000	£'000	£
1-5	32	32	105	..	..	..
6-10	31	31	244	..	..	..
11-24	66	61	1,118	..	..	..
25-49	15	14	560	2,449	941	1,681
50-99	38	35	2,694	9,812	4,328	1,607
100-199	23	18	3,122	15,035	5,782	1,852
200-299	19	15	4,491	18,448	8,187	1,823
300-499	15	11	5,519	22,961	9,568	1,734
500 and over	16	12	12,240	72,770	35,870	2,931
Unsatisfactory returns	34	32	1,935	..	..	..
Total	289	222	32,028	157,910(c)	72,202(c)	2,254(c)

(ii) Employees, wages and salaries

All establishments: United Kingdom

Number employed on average during the year by the establishment (a)	Employees		Wages and salaries		Wages and salaries per head	
	Oper-atives	Others (d)	Oper-atives	Others (d)	Oper-atives	Others (d)
	Number	Number	£'000	£'000	£	£
1-5	..	..	..	..	..	..
6-10	..	..	..	..	..	..
11-24	..	..	..	..	..	..
25-49	466	87	363	108	779	1,238
50-99	2,170	509	1,486	611	685	1,200
100-199	2,622	500	1,854	640	707	1,279
200-299	3,723	766	2,821	829	758	1,082
300-499	4,392	1,154	3,261	1,251	742	1,084
500 and over	9,283	2,957	8,298	3,665	894	1,239
Unsatisfactory returns	..	..	..	..	..	..
Total	25,237(c)	6,621(c)	20,138(c)	7,913(c)	798(c)	1,195(c)

(a) Including working proprietors.

(b) The sum of the figures for the size groups exceeds the total for the industry to the extent that enterprises made returns for establishments in more than one size group.

(c) Including estimates for establishments employing fewer than 25 persons and for establishments not making satisfactory returns.

(d) Administrative, technical and clerical employees.

TABLE 3 Percentage analysis of employees, by age and sex, 1969 (a)

All establishments: United Kingdom

Ages	Males	Females	All employees
	Per cent.	Per cent.	Per cent.
Under 18	2	4	6
18 and over	56	38	94
All ages	58	42	100

Source: Department of Employment

(a) The percentages relate to the numbers employed (excluding working proprietors) at June 1969, the earliest date for which the information is available on the basis of the Standard Industrial Classification, (Revised 1968).

Footnotes to Table 4.

- (a) Some establishments employing fewer than 25 persons were included in returns for larger establishments. These amounted to 7 establishments in 1968 and 6 in 1963.
- (b) The method of classifying returns to sub-divisions of the industry is explained in the notes; the characteristic products of each sub-division are identified in Table 5.
- (c) Including services rendered to other organisations (amounts charged for hiring out plant, machinery or other goods, for providing transport, or for technical or other services rendered).
- (d) Direct sales of goods (excluding canteen takings) made to, and work done for, the general public by larger establishments are included. These amounted to £18,000 in 1968. Similar information is not available for 1963.
- (e) Characteristic products relate only to sub-divisions of the industry.
- (f) For sub-divisions of the industry, this is the ratio of sales of characteristic products to total sales of goods produced and work done. For the industry as a whole, this is the ratio of total sales of principal products by the industry to total sales of goods produced and work done.
- (g) Administrative, technical and clerical employees.
- (h) Excluding expenditure for establishments not yet in production.
- (i) Acquisitions less disposals.

TABLE 4 Analysis of larger establishments, 1963 and 1968

Establishments employing 25 or more persons: Analysis of returns received, United Kingdom (a)

	Unit	Sub-divisions of the industry (b)				Total			
		Wallpaper, including vinyl wall coverings		Articles of cellulose wadding and remainder of the industry		1963	1968		
		10	1968	21, 22	1968				
Number of enterprises	No.	9	12	89	64	98	76		
Number of establishments	"	24	30	127	103	151	133		
Gross output	£'000	20,050	32,262	65,803	109,511	85,853	141,773		
Net output	"	9,697	16,109	29,141	48,715	38,838	64,824		
Net output per head	£	1,410	2,134	1,540	2,297	1,506	2,254		
Sales and work done	£'000	goods produced and work done (c) (d)		19,106	30,974	60,436	106,026	79,541	137,000
		merchanted goods and canteen takings		393	524	5,077	3,161	5,471	3,685
Sales of characteristic products	"	17,703	29,860	46,887	84,925	(e)	(e)		
Index of specialisation (f)	Per cent.	93	96	78	80	92	92		
Purchases	£'000	materials for use in production and packaging, and fuel		9,341	14,790	31,060	56,617	40,401	71,407
		goods for merchandising and canteen purchases		475	480	4,128	2,403	4,603	2,883
Payments to other organisations	"	for work done on materials given out for transport		56	102	116	216	171	318
		by road			601		1,640		2,241
	"	by rail and other means excluding postal services		469		1,587		2,056	614
Stocks and work in progress	"	change during year		+ 536	+ 816	+ 52	+ 545	+ 588	1,362
Goods on hand for sale		at end of year		2,040	4,050	3,296	6,253	5,335	10,302
Work in progress	"	change during year		+ 14	- 52	+ 238	- 222	+ 253	- 274
		at end of year		117	351	1,002	2,213	1,120	2,564
Materials, stores and fuel	"	change during year		- 12	- 39	+ 229	+ 553	+ 216	514
		at end of year		1,397	2,182	4,853	7,705	6,250	9,887
Number employed on average during the year	No.	total, including working proprietors		6,879	7,550	18,916	21,205	25,795	28,755
		operatives		5,651	6,153	14,308	16,602	19,959	22,755
		other employees (g)		1,224	1,396	4,563	4,574	5,787	5,970
Wages and salaries	£'000	of operatives		3,408	5,368	7,763	12,789	11,170	18,157
		of other employees (g)		1,012	1,575	4,197	5,559	5,209	7,135
Wages and salaries per head	£	603	872	542	770	560	798		
Capital expenditure (h)	£'000	New building work		570	171	757	941	1,327	1,112
Land and existing buildings		acquisitions		7		265		272	37
	disposals		*	(i) 5	*	(i) 27	58	69	
Plant and machinery	"	acquisitions		1,625		1,974		3,599	4,439
		disposals		9	(i) 909	104	(i) 3,362	113	168
Vehicles	"	acquisitions		46		378		424	397
		disposals		11		170		181	124

For notes to this table - see page 141/5.

TABLE 5 Sales of principal products of the industry by larger establishments, including sales by establishments classified to other industries, 1963 and 1968

Establishments employing 25 or more persons: Analysis of returns received, United Kingdom

Industry sub-division (a)		1963		1968		Enterprises	Entries
		Quantity	Value	Quantity	Value		
10	Wallpaper	Th. rolls	£'000	Th. rolls	£'000	Number	Number
	Paper hangings, printed embossed and plain lining	116,445	17,864	124,573	25,642	11	24
	Heavy relief goods of the lincrusta and anaglypta type (ie not made on wallpaper machines)	..	851	5,242	1,575	*	*
	Vinyl wall coverings		(b)	..	9,292	9	12
	Total wallpaper	116,445	17,864	129,815	27,217	..	..
		..	851	..	9,292	..	..
21	Articles manufactured from cellulose wadding	Th. cwt.		Th. cwt.			
	Serviettes	51.9	757	..	3,200	8	10
		..	510				
	Paper towels	92.7	1,056(c)	424	3,573	5	6
		..	769				
	Handkerchiefs and facial tissues	396	5,678(c)	747	9,478	5	7
		..	63				
	Other manufactures not elsewhere specified (excluding sanitary towels (d))	..	2,894(e)	193	2,707	6	8
	Total articles manufactured from cellulose wadding	595	7,491	1,364	15,758	..	..
		..	4,236	..	3,200	..	..
22	Toilet paper						
	In cut sheets	129.3	1,701	158.0	1,726	10	11
	In rolls	1,084	9,947(c)	2,378	18,389	9	13
		..	1,081				
22	Articles manufactured from transparent regenerated cellulose film (including film laminated to plastic) excluding bags, wrappers, labels, jam pot covers and other packaging products	..	(b)	142	5,044	22	24
				..	607		
22	Purchased paper processed						
	Crêped, corrugated, crinkled, etc	834	4,381	276	1,592	15	17
		..	619	..	1,094		
	Gummed	..	3,305	..	4,686	19	24
	Other, excluding wrapping paper (whether or not printed or patterned), cut and packed	424	3,595	..	11,826	47	54
		..	3,802				
22	Filter rods for cigarettes			Millions			
	Cellulose acetate filter rods			..	9,100	*	*
	Paper filter rods			..	4,633	*	*
		..	(b)	127	466	*	*
				..	621		
22	Cigarette papers in booklet containers			Th. cwt.			
	Paper rolls and coils other than toilet paper	223	2,495	291	3,536	22	23
22	Paper yarns, cord, twine, etc	85.8	1,035	83.6	1,238	*	6
22	Pattern cards, dress patterns and transfers of paper	..	2,733	..	3,434	15	15

Continued on next page.

TABLE 5 (continued)

Industry sub-division (a)	1963		1968			
	Quantity	Value	Quantity	Value	Enterprises	Entries
	Th.cwt.	£'000	Th.cwt.	£'000	Number	Number
22 Picture and photo mounts of paper and cardboard	..	432	..	256	7	8
22 Bonbons, crackers and paper novelties	..	1,517	..	910	5	5
22 Cake boards, dish papers, doilies, crimped cases for confectionery and similar fancy paper goods	105	1,827	129	2,425	16	18
	..	1,142	..	1,129		
22 Bobbins and tubes of paper and cardboard	..	5,876	..	7,486	20	25
22 Vulcanised fibre, sheet, strips, etc	51	982	40.0	831	*	*
			..	227		
22 Other manufactures of paper and cardboard, not elsewhere specified	..	6,862	239	2,268	62	68
			..	7,921		
Unclassified manufactures of paper and board	..	593	..	434	6	6
Other products (including retail pattern books)	..	6,652	..	1,036	14	24
Waste products						
Paper and board	}	215	..	372	44	45
Other			..	41	10	11
Work done		224		107	7	8
Total	..	91,456	..	148,903	..	..
Sales in other industries (see Table 6)		18,084		22,659	..	..
Principal products of this industry sold by establishments in the industry		73,371		126,244	76	115(f)

(a) The number given is that of the sub-division of which the item is a characteristic product. The sales shown are total sales by larger establishments, not merely sales by establishments classified to the sub-division.

(b) Not recorded separately for 1963.

(c) Amended figure.

(d) The output of sanitary towels is included in the report on the Surgical Bandages etc Industry (Part No. 42).

(e) Including babies' disposable napkins where not recorded separately for 1963. The output of babies' disposable napkins is included in the report on the Surgical Bandages etc Industry (Part No. 42).

(f) This figure represents the total number of returns made for larger establishments in this industry which is less than the total number of establishments shown in Table 4 on account of combined returns covering more than one establishment.

TABLE 6 Sales of principal products of the industry by larger establishments classified to other industries, 1963 and 1968

Establishments employing 25 or more persons:
Analysis of returns received, United Kingdom

	1963		1968			
	Quantity	Value	Quantity	Value	Entries	Principal industries in which produced (a)
		£'000	Th.cwt.	£'000	Number	
Vinyl wall coverings	..	(b)	..	7,721	7	34,145,149
Articles manufactured from cellulose wadding (including serviettes, paper towels, handkerchiefs, facial tissues and other manufactures not elsewhere specified but excluding sanitary towels)	..	3,883	..	520	6	140
Toilet paper in cut sheets and rolls	..	4,292	..	180	6	137,140
Articles manufactured from transparent regenerated cellulose film (including film laminated to plastic) excluding bags, wrappers, labels, jam pot covers and other packaging products			Th.cwt.			
		(b)	46.8	1,615	17	137,138,139,140
		..	..	219		
Purchased paper processed	Th.cwt.					
Crêped, corrugated, crinkled, etc	104	559	}	248	10	137,138,139,143
	..	11				
Gummed	..	1,568	..	1,475	16	137,140,143,144
Other excluding wrapping paper (whether or not printed or patterned), cut and packed	141	1,110	}	335	34	137,138,139,140
	..	1,196				
Paper rolls and coils other than toilet paper, paper yarns, cord, twine, etc	46.3	427	..	531	13	97,139,140
Pattern cards, dress patterns and transfers of paper	..	51	..	55	5	138,143
Picture and photo mounts of paper and cardboard	..	245	..	237	*	138,140,148
Bonbons, crackers and paper novelties, cake boards, dish papers, doilies, crimped cases for confectionery and similar fancy paper goods	..	515	..	832	9	13,96,138,140
Bobbins and tubes of paper and cardboard	128	379	}	..	14	45,70,137,138
	..	207				
Other manufactures of paper and cardboard not elsewhere specified and other products	..	3,642	..	2,799	53	137,138,140,143
Total		18,084		22,659	..	

(a) The references given are to the list of industries at the front of this report.

(b) Not recorded separately for 1963.

TABLE 7 Sales of other than principal products by larger establishments in the industry, 1963 and 1968

Establishments employing 25 or more persons:
Analysis of returns received, United Kingdom

	1963	1968
	Value	Value
	£'000	£'000
Paper and board	764	3,679
Oiled waxed and other waterproof wrappings	700	493
Cellulose wadding	24	331
Boxes and cartons of paper and cardboard	163	488
Packaging products of paper and associated materials (other than board)		
Wrapping paper (whether or not printed or patterned)	899	457
Other packaging products		2,085
Manufactured stationery	664	228
Articles wholly or mainly of plastics material	739	770
Printed goods (including work done on customers' own materials)	452	415
Other goods and services rendered to other organisations (a)	1,766	1,809
Canteen takings	248	245
Total value of goods sold without having been subjected to any manufacturing process (merchanted or factored)	5,223	3,439
Total	11,641	14,441

(a) Services rendered comprises amounts charged for hiring out plant, machinery or other goods, for providing transport, or for technical or other services rendered to other organisations.

TABLE 8 Production of certain principal products of the industry by larger establishments, 1963 and 1968

This table is not applicable to this industry.

TABLE 9 Purchases by larger establishments of selected principal products of the industry, 1968

This table is not applicable to this industry.

TABLE 10 Purchases by larger establishments in the industry, 1963 and 1968

Establishments employing 25 or more persons: Analysis of returns received, United Kingdom

	1963		1968	
	Quantity	Cost	Quantity	Cost
		£'000		£'000
Materials for use in production				
Wood pulp	..	1,353	..	8,650
Paper				
Base for wallpaper (long elephants)	..	5,169	..	7,402
Other paper				
Uncoated				
Kraft liner (below 200 g.s.m.) and semi-chemical fluting	}	14,441	..	316
M.G. sulphite paper			..	3,891
Other uncoated paper			..	14,869
Coated paper	..	1,505	..	2,423
Processed paper (oiled, waxed, enamelled, stained, etc)	..	315	..	196
Fancy paper (crêped, corrugated, crinkled, etc)	..	734	..	1,226
Board				
Uncoated				
Pulpboard	}	1,190	..	232
Lined waste paper boards			..	260
Unlined waste paper boards			..	910
Other uncoated boards			..	1,485
Coated board	..	325	..	459
Transparent regenerated cellulose film (other than for your own packaging)	..	92	..	2,880
Polyethylene and polypropylene and copolymers: sheet, rod, film, foil, profile shapes and monofilament	..	397	Th.cwt. 52.1	595
General chemicals (a)				
Inorganic (including inorganic gases)	}	418	..	402
Organic (including organic gases)			..	634
Other (eg mixtures of inorganic and organic chemicals)			..	881
Glues and adhesives (including formulated adhesives, but excluding unformulated synthetic resins bought as such)(b)	..	1,725	..	1,368
Wax, refined, blended, bleached, etc	..	150	..	177
Pigment colours	..	639	..	1,319
Printers' inks	..	256	..	871
Aluminium foil	..	588	7.6	284
	Th.sq.yds.			
Woven piece goods (other than narrow fabrics) wholly or mainly of cotton (book-cloth, etc)	475	57	..	89
Narrow fabrics and other textile smallwares	..	222	..	83
	Th.gal.		Th.gal.	
Lubricating oils and greases	}	34.6	11	26
		..	2	..	11
Replacement parts for firms' own machinery, plant and vehicles, and accessories and consumable tools bought as replacement				
Tyres and other spare parts for firms' own road goods vehicles	}	897	..	33
Other			..	1,165
All other materials for use in production	..	6,241	..	10,009

Continued on next page.

TABLE 10 (continued)

	1963		1968	
	Quantity	Cost	Quantity	Cost
Packaging materials		£'000		£'000
Paper and board				
Boxes, cartons, drums and canisters (with or without metal ends) of paper and cardboard	..	1,851	..	2,407
Fibre-board packing cases			..	1,567
Wrapping and packing paper (including paper coated with plastics and any laminates incorporating paper but not metal)			..	312
Paper and board for converting into packaging materials	..	254	..	30
Other packaging materials of paper and paperboard (including moulded pulp units and labels)			..	298
Containers wholly or mainly of wood (including plywood boxes and drums), baskets and wickerwork crates	..	60	..	66
Transparent regenerated cellulose film				
In sheets or rolls	..	(c)	..	194
Bags			..	17
All other packaging materials	..	248	..	473
Fuel and electricity (d)	Th. tons		Th. tons	
Coal	32.5	183	50.3	264
Coke (including screenings) and manufactured fuel	1.1 ..	10 4	..	29
	Th. gal.		Th. gal.	
Derv fuel and motor spirit for use in road vehicles	564	121	603 ..	166 24
Other liquid fuels (including creosote/pitch mixtures, etc and liquefied petroleum gases)	7,740	291	..	953(e)
	Th. therms		Th. therms	
Gas	327 ..	24 10	557 ..	45 19
	Th. kWh		Th. kWh	
Electricity	94,002 ..	545 72	201,141 ..	1,185 213
Total cost of materials and fuel		40,401		71,407
Goods purchased for merchanting		4,332		2,637
Canteen purchases		271		246
Total cost of purchases		45,004		74,290

(a) For 1963 described as 'Heavy chemicals (acids, alkalis, alcohols, other inorganic and organic chemicals, compressed gases, etc)'.

(b) For 1963, described as 'Glues and adhesives (including compound synthetic resin adhesives, but excluding synthetic resins bought as such)'.

(c) Not recorded separately for 1963.

(d) The total quantity of electricity generated in establishments employing 25 or more persons in this industry was 27,985 Th.kWh in 1968 and 2,588 Th.kWh in 1963.

(e) For 1968, may include a small amount of fuels not covered by specific headings.

TABLE 11 Transport costs and employment of larger establishments, 1963 and 1968

Establishments employing 25 or more persons:
Analysis of returns received, United Kingdom

	Unit	1963	1968
Average number mainly employed on transport	No.	388	367
Transport costs			
Wages and salaries	£'000	314	366
Derv fuel and motor spirit	"	121	190
Tyres and other spare parts for road goods vehicles	"	..	33
Payments to other organisations for transport	"	2,056	2,241
			614
Costs of operating road goods vehicles			
Insurance	"	20	16
Vehicle licences	"	17	34
Depreciation	"	97	154
Payments to other organisations for repairs and maintenance	"	53	93
Total	"	2,678(a)	3,742

(a) Excluding tyres and other spare parts for road goods vehicles, not collected separately for 1963.

TABLE 12 Payments for certain services, etc by larger establishments, 1963 and 1968 (a)

Establishments employing 25 or more persons:
Analysis of returns received, United Kingdom

	Amounts payable	
	1963	1968
Repairs and maintenance to	£'000	£'000
Buildings	208	298
Road goods vehicles	53	93
Plant, machinery and other capital equipment	450	768
Insurance, licensing and depreciation of road goods vehicles (b)	134	204
Rates, excluding water rates	550	968
Hire of plant and machinery	23	161
Postage, telephone, telegrams, cables and telex (c)	406	534
Total	1,824	3,025

(a) No deduction is made for these payments to arrive at the figures of net output given in this report.

(b) For details see Table 11.

(c) Excluding telex for 1963.

TABLE 13 Percentage analysis of twelve-month periods covered by returns from larger establishments, 1968

Establishments employing 25 or more persons:
Analysis of returns received, United Kingdom

Year ended	Percentage of total returns received	Percentage of total number employed
1968	Per cent.	Per cent.
April (a)	0.9	0.2
May	0.0	0.0
June	1.7	0.5
July	1.7	2.0
August	0.9	0.4
September	2.6	0.6
October	1.7	0.5
November	5.2	3.3
December	47.8	58.3
1969		
January	2.6	0.5
February	0.9	0.3
March	31.3	32.6
April (b)	2.6	0.8
	100	100

(a) From 6 April.

(b) To 5 April.