

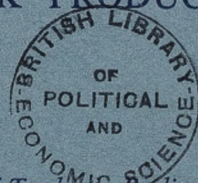
BOARD OF TRADE

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*The Report on the  
Census of Production  
for 1954*

Volume 8: Industry F

MILK PRODUCTS



*Presented by the Board of Trade to Parliament in pursuance of the  
Statistics of Trade Act, 1947 (10 & 11 Geo. 6 Ch. 39, Sec. 7)*

LONDON: HER MAJESTY'S STATIONERY OFFICE

1958

PRICE 1s 9d NET

# The Report on the Census of Production for 1954

VOLUME 8, INDUSTRY F

## MILK PRODUCTS

THIS REPORT on the Milk Products Industry relates to establishments engaged wholly or mainly in the manufacture of butter, cheese, condensed milk, evaporated milk, dried milk, etc., including infants' and invalids' foods with a milk base, and in sterilising (pasteurising), cooling and bottling milk. Milk bottling by retailers who do not maintain a central bottling or pasteurising depot is excluded.

This industry corresponds to minimum list heading 154(1) in the Standard Industrial Classification.

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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 process 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
	1948	1951	1954		
Gross output (production)	£ million 227.7	£ million 299.5	£ million 420.5	£ million 30.30	£ million 32.73
Net output	27.4	35.7	47.5	3.72	2.28
Total stocks and work in progress					
At beginning of year	3.4	6.4	9.1	0.61	0.36
Change during year	+ 0.5	+ 1.7	+ 3.1	+ 0.32	+ 0.22
Capital expenditure less disposals (a)	3.4	6.4	5.9	0.48	0.80
Wages and salaries	14.1	18.7	24.4	1.41	1.26
Total employment (including working proprietors)	Thousands 48.3	Thousands 54.8	Thousands 58.2	Thousands 3.98	Thousands 3.19

(a) Capital expenditure on new building work, plant, machinery and vehicles (including (except in 1948) that incurred in Great Britain 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
<b>FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS</b>				
Number of establishments	No.	581	657	648
Total value of sales and work done	£'000	213,896	290,042	400,733
Products on hand for sale		654	1,630	3,139
and work in progress		217	107	2,247
Gross output (production) (a)		211,506	290,150	402,980
Milk subsidy		21,889	28,023	46,821
Transport subsidy			2,345	2,893
Purchases of materials and fuel		208,126	281,119	399,327
Stocks of materials and fuel		2,531	4,570	5,539
Cost of materials and fuel used		207,914	279,593	398,575
Payment for work done on materials given out		62	102	88
Payment for transport (b)		2,608	6,242	8,497
Net output		25,419	34,582	45,534
Average number of employees	{ operatives others	No. 37,884	43,874	46,776
Total employment (d)		6,947 (c)	8,349	8,876
Net output per person employed (d)		44,862	52,295	55,728
		£	661	818
Wages and salaries	{ of operatives of others	£'000	10,712	14,732
			2,361	3,393
Capital expenditure				
New building work (e)		504	1,117	1,003
Plant and machinery	{ acquisitions (e) disposals	2,081	3,858	3,604
		131	167	220
Vehicles	{ acquisitions (e) disposals	777	883	1,032
		54	123	126
<b>FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS</b>				
Number of returns	No.	178	195 (f)	291
Total employment, including working proprietors		1,050	1,280 (f)	1,788

(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 outworkers and including working proprietors.

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

(f) Excluding Northern Ireland. No information about small firms was collected in Northern Ireland for 1951.

## Analysis by size, 1954

## Larger establishments in the United Kingdom

TABLE 3

Average number employed (a)	Estab-lish-ments	Gross output	Net output	Employees		Wages and salaries		Capital expenditure (b)	Net output per person employed (a)
				Operatives	Others	Operatives	Others		
11 - 24(c)	125	£'000 27,145	£'000 2,162	Number 1,774	Number 398	£'000 682	£'000 169	£'000 289	£ 981
25 - 49	206	70,249	5,986	6,243	1,332	2,431	570	1,138	787
50 - 99	172	105,229	10,325	10,189	1,960	3,968	839	1,623	849
100 - 199	88	88,456	9,358	10,263	1,927	4,270	964	1,189	768
200 - 299	29	45,116	5,314	6,061	1,000	2,482	447	406	752
300 - 399	13	19,140	3,224	3,971	554	1,589	259	341	713
400 - 499	6	17,940	1,928	2,449	230	1,239	106	70	720
500 - 999	6	17,261	3,940	3,328	834	1,499	420	321	947
1,000 and over	3	12,443	3,296	2,498	641	1,082	340	262	1,050
Total	648	402,980	45,534	46,776	8,876	19,242	4,114	5,639	818

(a) Excluding outworkers and including working proprietors.

(b) Capital expenditure on new building work and on acquisition of plant, machinery and vehicles, excluding expenditure for establishments not yet in production.

(c) Including a small number of establishments with fewer than 11 persons employed, particulars of which were included with those for larger establishments on a single return.

## Analysis according to specialisation within the industry, 1954

## Larger establishments in the United Kingdom

TABLE 4

	Unit	Specialist producers of				Remain-der of the in-dustry	Total
		Butter	Cheese and pro-cessed cheese	Whole milk (bottled or pro-cessed)	Conden-sed milk		
Number of establishments	No.	43	41	511	7	46	648
Total value of sales and work done	£'000	32,232	13,672	316,836	8,487	29,505	400,733
Sales of characteristic products	"	27,484	10,629	295,769	6,746	(a)	3,139
Products on hand for sale	"	335	549	994	(a)	406	2,247
and work in progress	"	+ 349	+ 50	+ 762	+ 680	+ 406	402,980
Gross output (production)	"	32,581	13,723	317,598	9,167	29,912	46,821
Milk subsidy	"	2,471(a)	4,160	28,786	2,063(a)	9,434	2,893
Transport subsidy	"		70	2,426		303	
Purchases of materials and fuel	"	32,664	14,909	309,463	9,581	32,711	399,327
Stocks of materials and fuel	"	1,040	808	2,235	504	953	5,539
change during year	"	- 51	+ 274	+ 345	+ 83	+ 101	+ 752
Cost of materials and fuel used	"	32,715	14,634	309,118	9,498	32,610	398,575
Payment for work done on materials given out	"			39	-		88
Payment for transport	"	296(a)	224(a)	6,897	209	920(a)	8,497
Net output	"	2,041	3,094	32,757	1,523	6,119	45,534
Average number of employees	No.	1,661	2,246	37,530	1,021	4,318	46,776
operatives	"	423	570	6,340	243	1,300	8,876
others	"	2,090	2,820	43,935	1,264	5,619	55,728
Total employment (b)	"	977	1,097	746	1,205	1,089	818
Net output per person employed (b)	£						
Wages and salaries	£'000	590	815	15,764	418	1,653	19,242
of operatives	"	190	303	2,753	121	747	4,114
of others	"						
Capital expenditure	"	17	20	875	5	85	1,003
New building work (c)	"	138	244	2,665	103	456	3,604
Plant and machinery	"	10	20	149	20	20	220
disposals	"	46	(a)	858	(a)	94	1,032
acquisitions (c)	"	2	4	97	-	23	126
disposals	"						

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

(b) Excluding outworkers and including working proprietors.

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

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## 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
Butter	Th.cwt.	£'000	Th.cwt.	£'000	Number
Unblended, including whey butter	115.9	1,301	579.3	9,961	103
Blended	1,225.6	13,973	1,299.2	24,341	47
Total butter	1,341.5	15,274	1,878.5	34,302	..
Cheese (other than processed cheese)					
Cheddar	417.5	2,320	696.5	6,509	45
Cheshire	304.7	1,612	479.6	4,393	33
Stilton (blue and white)	8.7	197	22.0	371	5
Other varieties	38.8	284	116.9	1,073	27
Cheese, processed	58.9	1,422(a)	324.4	5,813	11
Total cheese	828.6	5,835	1,639.3	18,158	..
Cream	Th.Imp.gal.		Th.Imp.gal.		
Fresh, including pasteurised and clotted cream	846	1,420	3,600 Th.cwt. 14.0	5,076	266
Other, including whey cream, sterilised cream and artificial cream, but excluding synthetic cream	10.7	108	84.0 ..	1,114 291	47
Whole milk					
Bottled	Th.Imp.gal. 913,280	142,357	Th.Imp.gal. 1,023,464	199,344	441
Processed or brine cooled, but not bottled	741,274	99,655	646,857	108,872	488
Separated milk	4,335	109	42,488	525	154
Condensed milk, including evaporated milk					
Sweetened					
Whole	Th.cwt. 596.1	3,364	Th.cwt. 893.2	4,888	20
Separated or skimmed	437.3	1,611	448.4	1,668	25
Unsweetened	768.0	3,262	1,202.8	6,039	13
Total condensed milk	1,801.4	8,237	2,544.4	12,595	..
Milk powder (including milk based patent and proprietary foods and food drinks and infants' and invalids' foods, not specifically medicinal, containing not less than 90 per cent. milk powder), whey powder and buttermilk powder					
Not sweetened					
Full cream	380.5	4,272	365.7 ..	3,837 541	32
Separated or skimmed	96.8	441	526.8 ..	1,996 319	43
Whey powder and buttermilk powder	116.2	539(b)	84.6 ..	192 42	22
Sweetened	..	..	42.4	598	9
Synthetic cream, including synthetic cream powder	Th.gal. 239.7 2,158	1,445 1,246	138.5 ..	918 774	33
Lactose	Th.cwt. 95.6	576	116.2	670	..
Other milk products, including malted milk, proprietary foods and food drinks not elsewhere specified	285.3 ..	4,382 668	15.5 ..	228 4,902	123

(86291)

TABLE 5 (contd.)

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
	Th.cwt.	£'000	Th.cwt.	£'000	Number
Waste products	..	148	..	311	180
Work done for the Ministry of Food on materials owned by them (c)					
Cheese processing	141.8	252	26.7	94	6
Other		723		624	38
Work done for the trade or on commission (c)					
Butter blended on commission	1,386.0	445	659.3	251	18
Other work		860		1,558	133
Total		288,991		398,587	..
Sales in other industries (see Table 6)		1,418		1,736	..
Principal products of this industry sold by establishments in the industry		287,573		396,851	630

- (a) So far as recorded separately.  
 (b) Described as 'Other' in 1951.  
 (c) Amount charged.

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.cwt.	£'000	Number	
Whole milk, bottled; condensed milk including evaporated milk; and cream other than pasteurised, clotted or synthetic cream	..	95	..	8G, 8I, 9L
Milk powder (including patent and proprietary foods and food drinks and infants' and invalids' foods not specifically medicinal), whey powder, butter-milk powder and synthetic cream including synthetic cream powder	86.5	1,345	11	2F, 8G, 8H, 8I
	..	263		
Other milk products, including lactose	..	32	..	8G, 9G
Total		1,736	..	

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

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

TABLE 7

	1954	
	Quantity	Value
	Th.gal.	£'000
Ice cream		
Sold in bulk	242	99
Prepacked for retail sale		
Choc ices	183	147
Other, including ice cream mixes and powders	928	464
Water ices	10	4
Fruit juices	3,332	808
Other goods	203	1,016
Total	..	861
Total		3,881

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
	Mn. Imp. gal.	£'000
Materials		
Milk		
Whole	2,057.5	338,611
Separated, whey and buttermilk	39.8	438
Milk powder, unsweetened	..	124
Full cream	16.9	150
Separated or skimmed	48.8	171
Butter		
Imported	1,257.7	22,820
Home-made	142.1	2,722
Cream	504.5	1,365
Cheese purchased for processing	..	1,853
Sugar	272.2	2,785
Total	658.8	1,867

TABLE 9 (contd.)

	Quantity	Cost
	Th. Imp. gal.	£'000
Materials (contd.)		
Rennet	39.1	55
	Th. cwt.	
Margarine and compound cooking fats	30.0	201
Refined vegetable oils	51.7	381
	..	64
Chocolate couverture, block chocolate and chocolate powder	9.6	128
Eggs not in shell	1.4	32
Piece goods of cotton or mainly of cotton		
	Th. sq. yds.	
Cheese cloth	1,208.6	66
	..	87
Filter cloth	92.6	13
	..	5
Packing materials		
	No.	
Milk churns	70,214	186
	..	22
Milk bottles	Th. gross	
	1,591.6	2,774
Aluminium strip	Th. cwt.	
	69.6	1,326
Metal containers excluding metal crates	142.6	852
	..	902
Oiled, waxed and other waterproof wrapping paper	12.7	136
	..	100
Cardboard boxes, cartons and fibre-board packing cases	229.6	1,109
	..	367
All other packing materials including metal crates	..	4,190
Replacement parts for machinery, plant and vehicles and consumable tools bought as replacement	..	2,312
All other purchased materials	..	5,188
Fuel and electricity		
	Th. tons	
Coal	503.9	2,249
Coke	36.4	201
Liquid fuel (including creosote/pitch mixtures)		
For use in internal combustion engines	Th. gal.	
Motor spirit (petrol) for use in road vehicles and derv. fuel	10,344.1	1,855
	150.2	10
Other	..	5
	7,008.5	291
For burning in furnaces, boilers, kilns, etc.	..	61
Gas purchased	Th. therms	
From Gas Boards	510.0	32
	..	6
From other sources, including other departments of the same firms	..	-
Electricity purchased (a)	Th. kWh.	
From Electricity Boards	187,563.0	1,129
From other sources, including other departments of the same firms	514.0	5
	..	2
All other purchased fuel		81
Total cost		399,327

(a) The total quantity of electricity generated in firms' own establishments in this industry in 1954 was 10,102 Th. kWh.

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Average number of employees and wages, salaries and superannuation payments (a)  
Larger establishments in the United Kingdom

TABLE 10

	1951	1954
	Number	Number
Average number of employees		
Operatives	43,874	46,776
Administrative, technical and clerical employees	8,349	8,876
Total	52,223	55,652
Wages and salaries paid to	£'000	£'000
Operatives	14,732	19,242
Administrative, technical and clerical employees	3,393	4,114
Total	18,124	23,355
Wages and salaries per head	£	£
Operatives	336	411
Administrative, technical and clerical employees	406	463
Superannuation and other pension funds for employees and dependents (b)		£'000
Employers' contributions	..	327
Employees covered	..	Number 22,380
Pension, etc. payments to former employees and dependents (b)	..	£'000 48

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

	1951	1954
	Number	Number
Canteen workers		
Male	34	26
Female	467	500
Total	501	526
Other workers		
Male	1,496	1,389
Female	702	529
Total	2,198	1,918
Total excluded employees	2,699	2,444

(b) The figures given relate to larger establishments in Great Britain only.

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

TABLE 11

	1951			1954		
	Males	Females	Total	Males	Females	Total
Working proprietors	63	9	72	68	8	76
Operatives	36,066	7,839	43,905	37,436	8,667	46,103
Administrative, technical and clerical employees	3,995	4,443	8,438	4,430	4,657	9,087
Total employees	40,061	12,282	52,343	41,866	13,324	55,190

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

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