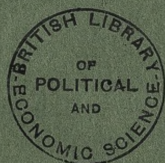




BOARD OF TRADE

FINAL REPORT
on the
CENSUS OF PRODUCTION
FOR 1948

Introductory Notes



*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).*

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TWO SHILLINGS NET.

INTRODUCTORY NOTESIntroduction

1. The 1948 census was the first full census of production taken since the war. Five full censuses of production were taken under the Census of Production Act, 1906, for the years 1907, 1912, 1924, 1930, and 1935. In addition to the census of production, surveys with a more limited industrial coverage were taken in respect of 1933, 1934, 1937, and 1938 under the Import Duties Act, 1932, which conferred somewhat different powers from those of the Census of Production Act. For the survey of industrial production taken in respect of 1935, the powers conferred by both the Census of Production Act and the Import Duties Act were used.
2. In June 1945 the President of the Board of Trade appointed a Census of Production Committee under the chairmanship of Sir George Nelson to consider and report upon what additional information should be collected at future censuses of production and to recommend what amendments should be made to the Census of Production Act.
3. The report of the Committee was presented to Parliament and its recommendations found expression in the Statistics of Trade Act, 1947. In the schedule to the Act there were specified a number of subjects about which questions might be asked, their scope being sufficient to permit an effective analysis of the most important aspects of production.
4. The Act laid down that the Board of Trade shall, for the purpose of providing general surveys of the state of trade and business, take a census of production in respect of the year 1948 and of every subsequent year. Accordingly, for 1948 a census was taken and compulsory questions were asked about wages and salaries, capital expenditure, and other matters not hitherto covered in a full census of production.
5. These and other subjects (enumerated in detail below) were covered after consultation, as provided for in the Act, with the Census of Production Advisory Committee. This Committee, appointed by the President of the Board of Trade, included members representative of industry, research, the public service and organised labour. In addition the Board of Trade consulted trade associations and other Government Departments on the detailed headings in the materials and output sections to ensure that the information collected would be as useful as possible.

Area covered

6. The censuses for 1907 and 1912 covered the United Kingdom (which then included Southern Ireland). Southern Ireland (now the Irish Republic) has not, however, been included since 1912. The 1924 census included Northern Ireland but for 1930 and 1935 the Northern Ireland Government held their own census. The results of the Northern Ireland censuses were incorporated in the reports prepared by the Board of Trade, which thus covered the whole of the United Kingdom. The 1946 partial census, which covered establishments in the United Kingdom, was, however, entirely conducted by the Board of Trade. The Northern Ireland Government did not take a census of production for 1948; the figures for that year, therefore, relate to Great Britain only. The Statistics of Trade (Northern Ireland) Act, very similar to the 1947 Act which applied to Great Britain only, was passed in 1949 and censuses have been taken in Northern Ireland annually from that year onwards.

Scope of the census

7. The 1948 census covered undertakings in the field of industrial production, including building and contracting, public utilities, and mines and quarries; private firms, nationalised undertakings, and government establishments were included. For certain trades (e.g. boot and shoe repairing, and motor and cycle repairing), firms mainly engaged

in repairing were included if they worked mainly for the trade but were excluded if they mainly worked directly for the public. The coverage of the 1948 census was extended to include textile converting, laundry work, dyeing and dry cleaning, wigmaking, tea blending and coffee roasting, and the scrap metal trade, which were excluded from the 1935 census. Taxidermy and photography remained outside the census.

Period covered

8. Establishments were required to make returns for the calendar year 1948 but, if the calendar year was not their year of account, a return for a business year ending between April 5, 1948 and April 6, 1949 was accepted. A similar concession was made at previous censuses.

Treatment of small firms

9. As in the census of 1935 and the Import Duties Act inquiries, only firms employing more than ten persons on an average during the year were generally required to complete detailed returns for 1948: in most trades, firms employing ten persons or fewer were required only to furnish information about the number of persons employed and the nature of their business. In thirteen trades, however, in which the output of the smaller firms was thought to be a relatively important proportion of the total output, small firms were required to complete a simplified form, which varied from trade to trade. These trades were canvas goods and sacks; tailoring, dressmaking etc.; boots and shoes manufacturing and repairing, laundry, cleaning, job dyeing, and carpet beating; motor vehicles and cycles (repairing); bread and flour confectionery; fish curing; ice; soft drinks, British wines and cider; book etc. publishing (non-printing) and printing, bookbinding, engraving, etc. trades; building and contracting; local authorities (building and civil engineering); and gas supply industries. In the film production and textile converting trades, all firms, irrespective of size, were required to complete the detailed form. In the building trade a special form was used for firms employing 11 to 24 persons. The information collected from small firms, which was excluded from the preliminary reports of the census (published in the Board of Trade Journal from 8th April, 1950 onwards) is shown separately in Tables 2, 22, 23(ii), 24(ii), and 25(ii) in the final report for the trades concerned.

Method of canvass

10. The information that would be required from firms was notified to trade associations in 1947, and specimen preliminary forms were sent out to all firms in January, 1948 for information. In October 1948 a special form was sent to those establishments known or believed to be employing not more than ten persons in all trades except those for which additional information was to be required from small firms. This form required simply a statement of the nature of the business and the number of persons employed in the establishment on the average during the nine months ended 30th September, 1948, and those firms completing the form and which employed not more than eight persons on the average were not required to make any further returns in connection with the 1948 census.

11. At the beginning of 1949 a statutory form was sent to all the remaining establishments on the census register, numbering about 385,000 establishments, many of which had to be removed subsequently as non-effective (defunct businesses, duplicate addresses, etc.). Three months were allowed for the completion and return of the forms and in February and March postcards were sent out to about 240,000 establishments reminding them of the date by which the forms must be completed. Second reminders were required in about 115,000 cases. A final application was made by registered post to 14,800 establishments whose returns were still outstanding. Prosecution was resorted to in 125 cases. About 70,500 returns from firms employing more than ten persons and 123,000 from small firms (on the simplified statutory forms) were received. About 25 per cent. of the large and 2 per cent. of the small returns were found to be defective or inaccurate and were queried with the firms concerned. The number of small firms claiming, on the special form (see paragraph 10) or the statutory form, exemption from making a detailed

return was about 50,000. In addition, 2,400 large and 350 small forms were received by the Ministry of Fuel and Power.

12. The census was conducted by correspondence, no local staff of enumerators being employed by the census office. It is not surprising that in this detailed census - the first full census of production since 1935 - some firms found difficulty in completing their returns within the prescribed period. It was therefore not possible to begin to prepare the reports as soon as had been hoped.

Trade classification

13. In the 1948 census, establishments are classified to trades according to the nature of their output as shown by their returns and, as far as possible, in conformity with the Standard Industrial Classification. Certain products, called principal products, are identified as characteristic of the production of individual trades, the principal products for a given trade being, of course, of a similar nature or commonly associated in production. An establishment is classified to a trade if its production of principal products of that trade accounts for a greater proportion of the value of its output than does the production of principal products of any other trade. Its production of principal products of any trade other than the one to which it is classified is included in the "principal products" table in the report for that trade. The report on each trade includes a note on the minimum list headings of the Standard Industrial Classification covered by the report. The trade classification differs in many cases from that adopted in the reports for the 1935 census and the 1937 inquiry. As far as possible the returns made in 1935 and 1937 have, for the 1948 reports, been reclassified so as to provide figures for the earlier years comparable with the 1948 figures. For this reason, certain of the statistics now shown for the earlier years differ from the figures published in previous reports.

14. In some cases it has not been possible to reclassify the pre-war returns and, where necessary, a reference to the limited comparability is included in the introduction to the relative 1948 report.

The establishment

15. The basic unit for the collection of information was generally the "establishment". In the majority of 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 which were situated apart from the producing works were not regarded as separate establishments, but the persons employed therein and the value of their services were included in the return for the works. The activities, however, of separate selling or transport organisations, for which separate accounts were kept, were excluded from the return.

16. Undertakings with more than one establishment covered by the census of production were required to make a return in respect of each establishment, and to include in each return an appropriate proportion of the employees, wages, salaries, materials purchased etc. of any "common service" departments such as central offices, research facilities, etc. Where two or more distinct trades were carried on in separate departments of a single works, the firm was generally required to treat these as separate establishments and make a separate return for each department on the appropriate form.

17. If, owing to the system of accounting, firms with more than one establishment were unable to make separate returns for each establishment, they were allowed to make one return covering all establishments in one trade but were required, in addition, to give certain summary information separately for each establishment.

Subjects on which information was obtained in 1948

18. The following sections were included in the 1948 census:
1. Working proprietors.
 2. Persons employed.
 3. Wages and salaries, etc.
 4. Expenditure on plant, machinery, and vehicles.
 5. Value of buildings and land occupied and relinquished.
 6. Materials and fuel purchased in year of return.
 7. Amount paid for work given out.
 8. Payments for certain services rendered by other firms.
 9. Stocks at the beginning and end of the year.
 10. Output in year of return and, for certain intermediate products, the total quantities made.
 11. Analysis of sales.
19. In the 1935 census of production information was collected relating to items 2, 6, 7, and 10 only. Information relating to the other items was collected for 1948 for the first time in a full census but similar information had been collected for certain trades in the partial census for 1946.

Instructions for making returns

20. The following notes outline the general instructions given to firms on the way in which returns were to be completed, and should be of use in interpreting the results published in the reports.
21. In many trades it was found necessary to amend or supplement the general instructions in order to fit the special circumstances of the particular trade. Where these supplementary instructions affect the basis of the figures returned, a note of explanation is included in the report on the trade concerned. In interpreting the figures in any particular report, it is thus necessary to bear in mind the explanations and qualifications accompanying the report, as well as the general instructions summarised below.

Working proprietors

22. Firms, other than limited companies, were required to state the number of working proprietors engaged in the business. If the business was a partnership, all active partners were to be included, as well as members of their families who worked in it without receiving fixed wages or salaries. Proprietors working less than half the normal hours were to be excluded.

Persons employed

23. Firms were required to classify persons employed by them under the two main headings of (i) administrative, technical, and clerical employees and (ii) operatives.

"Administrative, technical, and clerical employees" included directors (other than those paid by fee only), 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" included all other classes of employees, i.e., broadly speaking, all manual wage-earners. The figures include operatives engaged in outside work of erection, fitting, etc., in Great Britain, as well as those employed in or about the factory or works; inspectors, viewers, and similar workers; operatives employed in transport work, stores, and warehouses (unless employed at a separate selling or transport organisation); and cleaners.

24. All of these figures were to exclude canteen employees, outworkers, and persons engaged in a merchanting business or any other business not covered by a firm's return. Directors paid by fee only were excluded.

25. The particulars required related to the persons on the pay-roll in certain specified weeks, whether full-time or part-time employees, including those temporarily absent from work through sickness or holidays, but excluding those who were stood-off or who were on strike for the whole of the week.
26. Firms were required to state the numbers employed in the pay-week ended on or about September 25, 1948 (or September 27, 1947, if the return covered a period ended before September 25, 1948), distinguishing males and females and those under 18 years of age. The numbers of operatives employed in a specified week in each month of the period covered by the return were also required. Firms were asked to state the number of canteen and of other excluded employees (see paragraph 24). Those employing 100 or more persons were also required to state the number of persons included in the return who were employed in a separate selling organisation or on certain types of work.
27. In trades where outworkers are employed, the numbers employed at four dates in the year were required to be stated, outworkers being defined as persons employed by the firm who worked on materials supplied by the firm but who worked in their own homes etc. Operatives directly employed who worked out of doors (e.g. maintenance workers) and employees of sub-contractors were not to be regarded as outworkers.
28. The main differences between the employment figures for 1948 and those obtained before the war are that the latter included working proprietors with administrative, technical, and clerical employees, and works foremen with operatives.

Wages and salaries

29. Firms were required to state the amount paid during each quarter of the year of return to operatives and to administrative, technical, and clerical employees. Payments to working proprietors, whether salaries or not, were to be excluded. The amounts returned were to include all overtime payments, bonuses, and commission, and were to be stated before deductions for income tax, insurance, contributory pensions, etc. Payments in kind, travelling expenses, lodging allowances, etc., were to be ignored. Other information asked for included the employers' contributions to all national insurance schemes, and payments to outworkers.
30. Substantially these particulars constitute new census information. There were no pre-war figures of comparable scope because the Census of Production Act, 1906 excluded wages from the subjects about which questions might be asked in a census of production. However, in conjunction with the 1935 Census a voluntary enquiry was conducted by the Ministry of Labour into the total wages bills of firms making census returns. The proportion of respondent firms sending replies which could be directly related to census of production data varied widely in different trades, but they provided a basis for estimating the approximate relationship between net output and the total wages bill of each trade in 1935. The available data, together with an indication of the size of the sample and the extent to which they were representative, were published for each trade in the final report on the 1935 Census. In many trades these figures need to be used with caution, where comparisons are made with 1948, in view of the subsequent reclassification in accordance with the Standard Industrial Classification.

Plant, machinery, and vehicles

31. Firms were required to state the total value of plant and machinery and of vehicles acquired or disposed of during the year, including the same items as for income tax. Firms assessed on a renewals basis were required to give the total cost of plant etc. acquired during the year, whether for renewals or expansion. Office machinery and railway sidings owned by firms were to be included as "plant". The value of plant etc. acquired (new and second-hand had to be stated separately) was to be assessed at the actual cost less any discounts received but including the cost of transport and installation. Plant produced by firms for their own use was to be included at the income tax value. In respect of items disposed of, the proceeds of sales were to be stated, including the estimated proceeds of insurance claims for plant etc. destroyed or damaged.

Buildings and land

32. Firms were required to give information about buildings and land occupied or relinquished during the year. The information related to buildings and land, including office buildings, used in connection with the output returned, and canteen and other facilities within the site area, but not to sports grounds, land held for future development, or dwelling houses for employees. New establishments, including new factories the building of which was financed by the government, are included only to the extent that they were occupied and in production during the year of return.

33. The following information was required:-

- (a) The gross schedule A value of, or if this was not known, the rent payable on the buildings and land occupied at the beginning of the year.
- (b) The capital expenditure on new buildings acquired during the year, including extensions or reconstruction of old buildings and the cost of replacing buildings destroyed by fire or war damage; site values and the purchase price of buildings which had already been used were excluded from this heading.
- (c) For land and old buildings acquired for the first time during the year:-
 - (i) The capital cost of freeholds acquired during the year (including the site value of new freehold buildings).
 - (ii) The annual rent of rented property.
 - (iii) For leasehold property the capital cost of any premium, the length of the lease to run, and the annual rent including ground rent (and, in Scotland, feu duties).
- (d) For land and old buildings relinquished during the year:-
 - (i) The selling value of freeholds sold.
 - (ii) The gross schedule A value of other properties relinquished, including buildings destroyed by fire or demolished, and property handed back to the owners, leased or rented to other firms, abandoned, or transferred to a part of the business not covered in the return.
- (e) The amount of rates (excluding water rates) payable in the year.

Materials and fuel

34. Firms were required to state the cost, and in most cases the quantity, of certain specified kinds of materials and fuel purchased in the year, as well as total purchases, which included all purchases of materials for use in production and of fuel, oil, gas, and electricity for all purposes, including heating, lighting, and transport; all packing materials, including the full cost of returnable cases and containers; workshop materials; office materials; water charges; materials for repair to firms' own buildings, plant and vehicles when carried out by their own workpeople included in the return; and consumable tools and parts for machinery purchased during the year as replacements. Materials, components, etc. which were purchased and re-sold in the same state (i.e. merchantable or factored goods), and materials supplied by customers for processing were excluded.

35. The questions relating to purchased fuel and electricity were more detailed than in any previous census and were common to practically all trades. For gas and electricity, separate figures were required for purchases from public supply, purchases from other sources, and for supplies from other departments of the respondent firm. Firms which generated electricity at the establishment covered by the return were also asked, as in 1935, to state the quantity they consumed of electricity so generated and to record in the output section any electricity sold.

36. The declared cost of materials was to include transport charges to the works, other than transport carried out by the establishment's own staff and, generally, any duty paid (less rebates, etc.). Materials, gas, or electricity transferred from other

departments of the firm not covered by the same return were to be included at the value recorded as output by the other department, plus any payment for transport.

37. The information obtained in 1937 and 1935 differed from that obtained in 1948. In the former years, questions were asked about certain specified materials etc. used, that is, materials etc. purchased during the year, adjusted by the firms for stock changes.

Work given out

38. For 1948, firms giving out materials for processing etc. to other firms or to any of their establishments for which separate returns were made were required to state the amount paid for the work given out in the year. Payments made to individual out-workers in respect of work done by them were excluded from this heading. In most trades firms were required to state the amount paid for all such work in one sum, but in a few trades separate particulars were required for different types of work.

Payments for certain services rendered by other undertakings

39. Firms were required to state the amounts paid by them during the year to other firms (including separate establishments of respondent firms), institutions, etc. for various services rendered. These services, full details of which are shown in Table 18 of the report, included repair and maintenance of buildings and of plant, machinery, and vehicles, hire of plant etc., advertising, research work, postage, telephone, etc., and commercial insurance. The amounts returned included charges, less discounts, by agents. The services specified in the form were not exhaustive, and the related tables provide only a measure of certain principal items of cost, not a complete picture. Nor does the amount recorded against any particular heading represent the whole expenditure on the activity named, but only the amount paid out to other firms. For example, a considerable amount of research work is carried out by firms' own employees included in their returns. (See footnote to table 15 of the report for the number of persons employed on certain research work by firms with 100 or more employees).

Stocks and work in progress

40. Firms were required to state the value of their stocks of finished products, and of materials and fuel at the beginning and end of the year; in most trades, separate particulars were required for some of the more important items of finished goods and of materials and fuel. Stocks were to be valued as for income tax purposes.

41. The value of work in progress at the two dates was also required. Firms were instructed not to include any progress payments made by them to sub-contractors working on their own materials, nor to make any deductions on account of progress payments received from customers.

42. Before the war firms were required to adjust individual items of their sales of finished products and purchases of materials and fuel for changes in stocks, and separate information relating to stocks was not then asked for.

Output in the year of return

43. For 1948, firms were required to give details of their sales during the year, by value and in most cases also by quantity; the net amount charged for packing materials, but not their weight, was to be included. "Sales" meant sales during the year of goods made in the establishment covered by the return, whether produced in the year or not. Sales of waste products and of goods made for the firm by outworkers or by other firms from materials given out to them were included; sales of merchantable goods were excluded. For industries such as building, shipbuilding, and cinematograph film production, however, in which the productive processes are complex and extend over long periods, a return of the value of work done in the year was required.

44. The value of sales was the net selling value, and this was defined as 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. Where goods were charged on a delivered basis to customers overseas, firms were asked to give the f.o.b. value. Firms were required to state, in one sum, the estimated amount included in the value of their sales which represented payments made by them to other firms for transport outwards.

45. Where separate returns were made for different departments of the same firm, and goods produced in one department were used in another department, the goods were required to be included in the output of the first (producing) department, and in the materials of the second (using) department, on the common basis of the charge that would have been made to an independent purchaser buying similar quantities, with due allowance for transport costs. Goods transferred to a separate selling organisation under the same control were to be valued on the same basis.
46. The method of valuation used in the 1948 (and 1946) censuses differed from that used pre-war. In 1935 and 1937 the net selling value related to the actual production of each item specified, i.e. sales during the year of goods made by the firm plus the book value of stocks at the end of the year, less that at the beginning of the year. Net selling value was defined as the actual amount charged to customers after deduction, inter alia, of payments to other firms for carriage outwards. Where separate returns were made for different departments of the same firm, transfers of goods between them were included at the values which were entered in the firm's books.
47. For 1948, firms working on commission or for the trade on materials given out to them by other firms were required to state, as the value of their output, only the net amount charged by them to customers. Where the work was done for manufacturing firms covered by the census, the value of the goods is included in the final selling values recorded by these firms.
48. In a number of trades firms were required to return, in addition to their sales, the total quantities of the more important intermediate products made in their works, whether they were sold (or added to stocks) as such, or were made into more finished goods in these works, or were made for other firms from materials given out by them.

Analysis of sales

49. Firms were required to analyse the sales returned in the output section according to specified channels of disposal, under the two main headings "Transfers to other organisations under same control" and "Sales to independent buyers". In this context, a business and its branches were regarded as being under the same control. Holding and subsidiary companies were similarly regarded if the subsidiary companies were covered by the definition contained in section 18 of the Companies Act, 1947. Essentially, under that section, a company was a subsidiary company when -
- (i) the holding company controlled the composition of its board of directors and was directly or indirectly the beneficial owner of any part of its share capital, or
 - (ii) the holding company and its subsidiary companies owned beneficially more than one half of the equity share capital of the company.

Calculations made from census returns

Gross output

50. The "gross output" of a trade is the total value of goods made and other work done during the year. For 1948 (and 1946) this is derived by subtracting from the value of sales and work done the value of stocks at the beginning of the year and adding the value at the end of the year. A deduction is then made for any payments made to other firms for transport outwards to offset a similar sum included in the recorded value of goods sold.

51. For 1935 and 1937, however, the values of individual items related to output in the year, allowances having already been made by firms for changes in stocks between the beginning and the end of the year, and for payments made to other firms for transport outwards: it was unnecessary, therefore, to make any adjustments for these factors.

Net output

52. The "net output" of a trade is defined, as in previous censuses, as the amount left after deducting from the value of the gross output the aggregate of the cost of materials and fuel used and the amount paid for work given out. This residual figure 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.

53. Normally any customs or excise duty on materials purchased was included in the cost of materials if purchased duty-paid, and excluded if purchased duty-free, the amount of the duty in the latter case being separately stated. Similarly, finished goods sold were valued accordingly as they were sold duty-paid or duty-free, the amount of duty and of drawback being separately stated; the net amount of duty payable is deducted in arriving at net output. The amounts of subsidies, allowances, and levies receivable or payable for particular branches of production were, where practicable, required to be stated separately.

54. The figures for net output per person employed are derived by dividing the net output by the average number of persons employed (full-time and part-time) including operatives, administrative, technical, and clerical employees and working proprietors, but excluding outworkers.

List of trade reports

55. A separate report will be published for each trade. A list of these trades will be found in Appendix A. Each page of a report will bear a reference consisting of:-
- (a) the number of the volume into which the report may be bound
 - (b) a letter indicating the trade within each volume
 - (c) the page of the trade report

e.g. 4/A/9 will indicate page 9 of the first trade report in volume 4. Reports will be published later summarising the census results for the main industries as a whole and dealing with special problems (e.g. duplication).

Disclosure of information

56. The reports have been prepared in conformity with the disclosure provisions of the Statistics of Trade Act, 1947. In many cases where the publication of a figure would involve disclosure, the figure has been combined with others of a similar nature.

Comparisons with previous years

57. The tables included in the final reports contain a detailed analysis of the results of the 1948 census. They expand the information contained in the preliminary reports. Comparisons are given in these tables with the 1935 census and with the 1937 Import Duties Act inquiry; the results of the latter had not been fully compiled at the outbreak of the war and are therefore now being published in most cases for the first time. The scope of the 1937 inquiry was more restricted than that of the main censuses. Where the 1937 figures are not substantially comparable with those for other years, an explanatory note is given in the reports concerned; in some of the more important cases, the 1935 figures are shown on two bases, one the full census totals and the other relating only to the section of the trade covered by the 1937 inquiry. Comparisons are also made with the 1946 partial census data where possible.

"Larger" establishments

58. Reference to "larger establishments" in the heading to a table indicates that the table covers only those establishments which employed more than 10 persons on the average during the year.

Symbols used

59. The following symbols are used throughout the reports:-

.. for not available

- for nil or negligible (less than half the final digit shown)

60. The figures in the tables have, where necessary, been rounded off to the nearest integer. There may, therefore, be an apparent slight discrepancy between the total shown and the sum of the constituent items.

Contents of the tables

61. In the following paragraphs are given the numbering and contents of each of the tables in the reports. The numbering of these tables is standardised throughout all the separate trade reports, an indication being given in the report of any tables which are not applicable to a particular trade. In order to avoid unnecessary duplication in certain cases where the data available relates only to 1948 (e.g. sales by small firms and some employment data) figures are shown only in the country tables.

Table 1. Summary: Larger establishments

This table gives, for all the larger establishments included in the trade, the aggregates of the principal data collected, including calculations of net output and net output per person employed. (For the method of calculating these see paragraphs 52 to 54 above.) Comparisons are generally made with 1937 and 1935 and, where information is available, with 1946.

Table 2. Summary, 1948: Small firms in Great Britain

For those trades in which small firms were required to complete a shortened form, this table gives, as far as it was collected, summary information similar to that for larger establishments contained in Table 1. As, however, small firms were not required to give information relating to stocks of materials or finished products at the beginning and the end of the year, the figure for gross output relates to sales and work done and that for materials and fuel to purchases during the year. These figures, and consequently those (where available) for net output and net output per person employed, are not, therefore, strictly comparable with those given in Table 1 for larger establishments.

For the remaining trades, in which the only figures small firms were required to give were the average numbers of males and females employed during the year, the table is confined to this information.

Table 3. Estimated average employment, 1948: All firms in Great Britain

This table gives an estimate of employment in all establishments in the trade. To the average employment in the larger establishments, given in Table 1, and the small firms, given in Table 2, is added an estimate of average employment in firms not making satisfactory returns. It is not practicable to obtain in the census as complete a coverage for small firms as for the larger establishments, partly because of unavoidable imperfection in the registers of establishments for some trades and partly because of the difficulty of securing returns in all cases. This should be borne in mind in reading the tables relating to small firms.

Table 4. Analysis by size, 1948: Larger establishments in Great Britain

Some of the principal results for 1948 shown in Table 1 are analysed according to the size of establishments.

Table 5. Analysis by standard region, 1948: Larger establishments in Great Britain

The analysis here is according to standard regions, particulars of which are given in Appendix B. An analysis by census areas, which were used in earlier census reports, is omitted, partly because of the need to avoid disclosing particulars of individual businesses and partly because in many trades the area grouping would show precisely the same figures as those for regions. An analysis by census areas will, however, be given in the summaries to be published later for the main groups of industries where questions of disclosure are likely to arise much less frequently, if at all.

Table 6. Analysis according to specialisation within the trade, 1948: Larger establishments in Great Britain

This table shows the extent to which the larger establishments specialise in the production of certain principal products or groups of products. For the purposes of this analysis, specialist producers are taken to be those establishments of whose total output by value 50 per cent. or more is accounted for by the groups of products specified. Details relating to non-specialist producers (i.e. establishments whose output of any one of these product groups does not amount to 50 per cent. of their total output) are included in the residual heading. The extent of specialisation is indicated by the relationship between the value of characteristic products sold and gross output.

Table 7. Total make of intermediate products: Larger establishments

This table shows the total quantities of certain products which were made, whether for sale or for further processing in the same establishments or on commission for other firms. Separate figures are given for the quantities made in the trade covered in the report and those made in other trades. Comparison is made, where possible, with 1937 and 1935.

Table 8. Sales (or production) of the principal products of the trade, including sales (or production) of these products by establishments classified to other trades: Larger establishments

This table shows the total sales by value, and in most cases by quantity, of products regarded as characteristic of the trade. It includes, therefore, the sales of these products returned by establishments classified to other trades. Comparison is made, wherever possible, with 1935 and 1937. Owing to the limited scope of the 1946 partial census, comparisons are not made with the results of that census. As explained in paragraph 46, the figures for 1935 and 1937 represent amounts produced and are not, therefore, strictly comparable with those for 1948.

Table 9. Sales (or production) of principal products of the trade by establishments classified to other trades: Larger establishments

This table shows separately the amounts included in Table 8 which were returned by establishments classified to other trades. Comparison is made, where possible, with 1937 and 1935.

Table 10. Sales (or production) in the trade of other than principal products: Larger establishments

This table shows the sales (or production) by establishments in the trade of products other than those regarded as characteristic products of the trade. Comparison is made, where possible, with 1937 and 1935.

Table 11. Analysis of sales, 1948: Larger establishments in Great Britain

In this table are shown the principal channels of sales. The total sales here will, of course, correspond with the total shown in Table 23 (or 23(i)) less the value of work done.

Table 12. Production, exports and imports of certain principal products: Larger establishments

This table compares, in most cases, the total sales by quantity in 1948 of products regarded as characteristic of the trade with the exports and imports of these products as shown in the Annual Statement of Trade of the United Kingdom. The census figures relate to Great Britain and include sales of these products recorded by establishments classified to other trades, but exclude sales by firms employing 10 persons or fewer: these figures are not, therefore, strictly comparable with the export and import figures which cover the United Kingdom and include all recorded imports and exports. In some cases, total quantities made or total sales by value are given instead of total sales by quantity. Comparison is made, where possible, with production, import and export figures for 1937 (or, where these are not available, with figures for 1935).

Table 13. Purchased materials and fuel: Larger establishments

This table shows the total cost of materials and fuel purchased by firms in the year, as well as the cost, and in most cases the quantity, of certain specified items: materials and fuel produced by the establishments using them are excluded. Comparison is made with the usage of purchased materials in 1935 and 1937 where this information is available.

Table 14. Stocks of finished products and work in progress and stocks of materials and fuel, 1948: Larger establishments in Great Britain

This table shows total stocks by value, and in most trades the quantity and value of some of the main items, or groups of items, of finished goods and of materials and fuel, as well as the total value of work in progress at the beginning and the end of the year.

Table 15. Employment and remuneration: Larger establishments

This table shows the average number of operatives employed in the year and the number of administrative, technical, and clerical employees in one week in September, classified in each category between males and females and distinguishing employees under 18 years of age. The sex and age distribution of the operatives is based on that recorded for one week in September. Outworkers and working proprietors are not included in the table but are shown separately at the foot of the table. Comparison is made with 1937 and 1935, where possible. Particulars are also given of "excluded" employees and certain persons employed on special work.

Total remuneration of operatives and of administrative, technical, and clerical employees is shown separately in the table and that of outworkers at the foot of the table. Comprehensive information relating to remuneration was not collected in previous censuses (see paragraph 30).

The definitions of operatives, and of administrative, technical, and clerical employees are given above in paragraph 23 and that of remuneration in paragraph 29.

Table 16. Wages and salaries paid, 1948: Larger establishments in Great Britain

This table shows the variations in the quarterly payments of wages and salaries during the year, separately for operatives and for administrative, technical, and clerical employees. The analysis relates to payments in each of the four quarters of 1948, based on information provided by establishments making returns for the calendar year.

Table 17. Payments for work on materials given out, 1948: Larger establishments in Great Britain

This table shows the amount paid by establishments in the trade to other establishments, both in the trade and in other trades, for work done on materials given out. In most trades, this information was collected as one sum for all work given out, and for these trades no separate table will be given. In a few trades, where the types of work given out fall into well defined classes, information was collected separately for each class. The total payments for work given out are shown in Table 1 for other years.

Table 18. Payments for certain services, 1948: Larger establishments in Great Britain

This table shows the payments made during the year by establishments to other establishments and institutions for various services rendered in connection with the output recorded (see paragraph 39).

Table 19. Plant, machinery, and vehicles acquired and disposed of, 1948: Larger establishments in Great Britain

This table shows the value of new and second-hand plant and machinery and vehicles acquired and the amounts received for plant and machinery and for vehicles disposed of during the year. For definitions of these terms see paragraph 31 above.

Table 20. Capital expenditure on building work and changes in occupation of buildings and land, 1948: Larger establishments in Great Britain

The capital values of new buildings and of freeholds purchased and sold are shown as returned. In the case of rented properties newly occupied, the amounts of the annual rents were returned and, in the case of leaseholds, the amounts of premiums and the expired terms of the leases. From these data estimates have been made of the capital value of the properties. Similarly, in the case of rented properties relinquished, the estimated capital value has been estimated from the gross schedule A values returned.

COUNTRY TABLES

The following tables give separately for the countries shown some of the main results for 1948 given in the preceding tables. Certain information additional to that in the previous tables is also included. It should be noted that all the information given in the country tables relates solely to establishments in the trade reported on.

Table 21. Summary: Larger establishments

This table analyses by country the information given in Table 1.

Table 22. Summary: Small firms

This table analyses by country the information given in Table 2.

Table 23(i) (or 23). Sales in the trade: Larger establishments

This table shows details of the sales by establishments in the trade of products, whether principal products or not, as well as the value of work done.

Table 23(ii). Sales in the trade: Small firms

This table shows, for those trades for which the information was collected from small firms, details of their sales, and the value of work done.

Table 24(i) (or 24). Purchased materials and fuel: Larger establishments

This table shows details of the purchases of materials and fuel by larger establishments in the trade.

Table 24(ii). Purchased materials and fuel: Small firms

This table shows, for those trades for which information was collected from small firms, details of their purchases of materials and fuel.

Table 25(i). Employment and remuneration: Larger establishments
This table analyses by country the information given in Table 15.

Table 25(ii). Employment: Small firms
This table analyses the available information about employment in small firms.

Table 26. Monthly index of employment of operatives: Larger establishments
This table shows the employment of operatives in larger establishments each month as a percentage of average employment for the year. The index is calculated from the total number of operatives employed (excluding outworkers) in one week of each month by the larger establishments which made returns for the calendar year. The size of the sample upon which the index is based is indicated by the number of operatives in returns used to calculate the index expressed as a percentage of the total number of operatives employed in all the larger establishments in the trade.

APPENDIX A

LIST OF TRADE REPORTS

Standard Industrial Classification Orders

Trades

VOLUME 1

II. Mining and Quarrying

- A. Coal Mines
- B. Non-Metalliferous Mines and Quarries
(other than Coal, Salt, and Slate)
- C. Salt Mines, Brine Pits, and Salt Works
- D. Slate Quarries and Mines
- E. Metalliferous Mines and Quarries

III. Treatment of Non-Metalliferous
Mining Products other than Coal

- F. Brick and Fireclay
- G. China and Earthenware
- H. Glass Containers
- I. Glass (Other than Containers)
- J. Cement
- K. Abrasives
- L. Building Materials
- M. Roofing Felts
- N. Manufactured Fuel

VOLUME 2

IV. Chemicals and Allied Trades

- A. Coke Ovens and By-products
- B. Dyes and Dyestuffs
- C. Fertiliser, Disinfectant, Insecticide,
and Allied Trades
- D. Coal Tar Products
- E. Chemicals (General)
- F. Drugs and Pharmaceutical Preparations
- G. Toilet Preparations and Perfumery
- H. Explosives and Fireworks
- I. Paints and Varnish
- J. Soap, Candles, and Glycerine
- K. Polishes
- L. Ink
- M. Match
- N. Mineral Oil Refining
- O. Oils and Greases
- P. Seed Crushing and Oil Refining
- Q. Glue, Gum, Paste, and Allied Trades

VOLUME 3

V. Metal Manufacture

- A. Blast Furnaces
- B. Iron and Steel (Melting and Rolling)
- C. Iron and Steel Foundries
- D. Steel Sheets
- E. Tinplate
- F. Wrought Iron and Steel Tubes
- G. Non-Ferrous Metals (Smelting, Rolling
etc.)

APPENDIX A

Standard Industrial Classification Orders

Trades

VOLUME 3 (contd.)

XX. Distributive Trades (Part)

 H. Scrap Metal

VII. Vehicles

- I. Motor Vehicles and Cycles (Manufacturing)
- J. Motor Vehicles and Cycles (Repairing)
- K. Aircraft Manufacture and Repair
- L. Railway Locomotive Shops and Locomotive Manufacturing
- M. Railway Carriages and Wagons and Trams
- N. Carts, Perambulators, etc.

VOLUME 4

VI. Engineering, Shipbuilding and Electrical Goods

- A. Shipbuilding and Ship Repairing
- B. Marine Engineering
- C. Machine Tools
- D. Textile Machinery
- E. Small Arms
- F. Constructional Engineering
- G. Mechanical Handling Equipment
- H. Printing and Bookbinding Machinery
- I. Mechanical Engineering (General)
- J. Mechanical Engineering (Repairing)
- K. Electrical Engineering
- L. Electric Wires and Cables
- M. Radio and Telecommunications
- N. Batteries and Accumulators
- O. Electric Lighting Accessories and Fittings

VOLUME 5

VIII. Metal Goods not elsewhere specified

- A. Tool and Implement
- B. Cutlery
- C. Chain, Nail, Screw, and Miscellaneous Forgings
- D. Wire and Wire Manufactures
- E. Hardware, Hollow-ware, Metal Furniture and Sheet Metal
- F. Brass Manufactures
- G. Needles, Pins, Fish Hooks, and Metal Smallwares

IX. Precision Instruments, Jewellery, etc.

- H. Scientific, Surgical, and Photographic Instruments
- I. Watch and Clock
- J. Jewellery and Plate
- K. Precious Metals Refining
- L. Musical Instruments

APPENDIX A

Standard Industrial Classification Orders

Trades

VOLUME 6

X. Textiles (Part)

- A. Cotton Spinning and Doubling
- B. Cotton Weaving
- C. Woollen and Worsted
- D. Rayon, Nylon, etc., and Silk
- E. Flax Processing
- F. Linen and Soft Hemp
- G. Jute
- H. Rope, Twine, and Net
- I. Hosiery and Other Knitted Goods
- J. Lace
- K. Carpets
- L. Narrow Fabrics
- M. Canvas Goods and Sacks

XX. Distributive Trades (Part)

 N. Textile Converting

X. Textiles (Part)

- O. Made-up Household Textiles
- P. Textile Finishing
- Q. Textile Packing

VOLUME 7

X. Textiles (Part)

- A. Asbestos
- B. Flock and Rag
- C. Hair, Fibre, and Kindred Trades
- D. Leather (Tanning and Dressing)
- E. Fellmongery
- F. Leather Goods
- G. Fur

XI. Leather, Leather Goods, and Fur

XII. Clothing

- H. Tailoring, Dressmaking, etc.
- I. Hats, Caps, and Millinery
- J. Glove
- K. Umbrellas and Walking Sticks
- L. Boots and Shoes

VOLUME 8

XIII. Food, Drink, and Tobacco (Part)

- A. Grain Milling
- B. Bread and Flour Confectionery
- C. Biscuit
- D. Wholesale Slaughtering
- E. Bacon Curing and Sausage
- F. Preserved Meat
- G. Milk Products
- H. Ice Cream
- I. Sugar and Glucose
- J. Cocoa, Chocolate, and Sugar Confectionery
- K. Preserved Fruit and Vegetables

APPENDIX A

Standard Industrial Classification Orders

Trades

VOLUME 9

- XIII. Food, Drink, and Tobacco (Part)
- A. Margarine
 - B. Fish Curing
 - C. Cattle, Dog, and Poultry Foods.
 - D. Vinegar and Other Condiments
 - E. Starch
 - F. Ice
 - G. Miscellaneous Preserved Foods
- XX. Distributive Trades (Part)
- H. Tea Blending and Coffee Roasting
- XIII. Food, Drink and Tobacco (Part)
- I. Brewing and Malting
 - J. Wholesale Bottling
 - K. Spirit Distilling
 - L. Spirit Rectifying and Compounding
 - M. Soft Drinks, British Wines, and Cider
 - N. Tobacco

VOLUME 10

- XIV. Manufactures of Wood and Cork
- A. Timber
 - B. Furniture and Upholstery
 - C. Soft Furnishings
 - D. Shop and Office Fitting
 - E. Wooden Containers and Baskets
- XV. Paper and Printing
- F. Paper and Board
 - G. Wallpaper
 - H. Cardboard Box, Carton and Fibre-board Packing Case
 - I. Manufactured Stationery, Paper Bag, and Kindred Trades
 - J. Newspaper and Periodical Printing and Publishing
 - K. Printing and Publishing, Bookbinding, Engraving, etc. Trades

VOLUME 11

- XVI. Other Manufacturing Industries
- A. Rubber
 - B. Linoleum, Leathercloth, and Allied Trades
 - C. Brushes and Brooms
 - D. Toys and Games
 - E. Sports Requisites
 - F. Miscellaneous Stationers' Goods
 - G. Cinematograph Film Production
 - H. Cinematograph Film Printing
 - I. Plastic Goods and Fancy Articles
 - J. Incandescent Mantles
 - K. Laundry, Cleaning, Job Dyeing, and Carpet Beating
- XXIV. Miscellaneous (Part)

APPENDIX A

Standard Industrial Classification Orders

Trades

VOLUME 12

- XVII. Building and Contracting
- A. Building and Contracting
 - B. Local Authorities (Building and Civil Engineering)
 - C. Railways (Civil Engineering)
 - D. Tram, Trolley Bus, and Omnibus Undertakings (Civil Engineering)
 - E. Canal, Dock, and Harbour Undertakings (Civil Engineering)
- XVIII. Gas, Electricity, and Water
- F. Gas Supply Industry
 - G. Electricity Supply Industry
 - H. Water Undertakings

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APPENDIX B

STANDARD REGIONS

The list below shows the names of the regions in Great Britain and the area covered by each. Counties, etc. are defined by reference to local government administrative areas.

1. Northern
Cumberland, Durham, Northumberland, Westmorland, and the North Riding of Yorkshire.
2. East and West Ridings
The East and West Ridings of Yorkshire, and the City of York.
3. North Midland
Derbyshire (except the High Peak District, which is included in the North Western region), Leicestershire, Lincolnshire, Northamptonshire (including the Soke of Peterborough), Nottinghamshire, and Rutland.
4. Eastern
Bedfordshire, Cambridgeshire (including the Isle of Ely), Hertfordshire, Essex, Huntingdonshire, Norfolk, and Suffolk, except such parts of Essex and Hertfordshire as are within the London and South Eastern region.
5. London and South Eastern
London (administrative county), Middlesex, Kent, Surrey, and Sussex, parts of Essex (the boroughs of Barking, Chingford, Dagenham, East Ham, Ilford, Leyton, Walthamstow, Wanstead and Woodford, and West Ham, and the urban districts of Chigwell and Waltham Holy Cross), and parts of Hertfordshire (the urban districts of Barnet, Bushey, Cheshunt, and East Barnet, and the rural district of Elstree).
6. Southern
Berkshire, Buckinghamshire, Dorset, Hampshire (including the Isle of Wight), and Oxfordshire.
7. South Western
Cornwall (including the Isles of Scilly), Devonshire, Gloucestershire, Somerset, and Wiltshire.
8. Wales
The whole of Wales and Monmouthshire.
9. Midland
Herefordshire, Shropshire, Staffordshire, Warwickshire, and Worcestershire.
10. North Western
Cheshire, Lancashire, and the High Peak District of Derbyshire (the boroughs of Buxton and Glossop, the urban districts of New Mills and Whaley Bridge, and the rural district of Chapel-en-le-Frith).
11. Scotland
The whole of Scotland.