

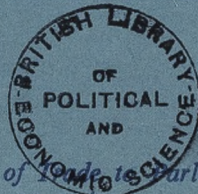
BOARD OF TRADE

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[HA 251]

*The Report on the
Census of Production
for 1954*

Volume 8: Industry B

BREAD AND FLOUR CONFECTIONERY



*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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The Report on the Census of Production for 1954

VOLUME 8 INDUSTRY B

BREAD AND FLOUR CONFECTIONERY

THIS REPORT on the Bread and Flour Confectionery Industry relates to bakeries and other establishments engaged wholly or mainly in the manufacture of bread, cakes, pastries, pies (other than meat pies), puddings (other than meat or canned puddings), etc. Bakehouses attached to bakers' shops are included.

Shop assistants and operatives (e.g. roundsmen) not employed in the actual manufacturing are included. For the purpose, however, of distinguishing the larger establishments (employing more than 10 persons on the average during the year) from the small firms they were not taken into account.

This industry corresponds to minimum list heading 151 in the Standard Industrial Classification.

LIST OF TABLES

Table No.	Title	Page	Table No.	Title	Page
1	Industry summary: estimates for the industry as a whole	8/B/3	6	Sales of principal products of the industry by establishments classified to other industries	8/B/6
2(i)	Summary of returns received: larger establishments	8/B/3	7	Sales in the industry of other than principal products	8/B/6
2(ii)	Summary of returns received: small firms	8/B/4	8	Total make of intermediate products	Does not apply
3	Analysis by size, 1954	8/B/4	9	Purchases of materials and fuel, 1954	8/B/7
4	Analysis according to specialisation within the industry, 1954	Does not apply	10	Average number of employees and wages, salaries and superannuation payments	8/B/8
5(i)	Sales of principal products of the industry, including sales of these products by establishments classified to other industries	8/B/5	11	Employment in a specified week	8/B/9
5(ii)	Total sales by small firms in Great Britain	8/B/5			

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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42
[HA 251]

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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 merchandising 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 merchandising 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		
	£ million	£ million	£ million	£ million	£ million
Gross output (production)	246.3	281.1	288.2	42.56	11.56
Net output	113.8	111.5	114.6	16.84	4.59
Total stocks and work in progress					
At beginning of year	11.7	15.2	13.3	2.18	0.49
Change during year	+ 0.5	+ 5.3	- 1.2	- 0.30	- 0.01
Capital expenditure less disposals (a)	9.0	13.6	12.8	1.27	0.64
Wages and salaries	54.2	63.6	68.1	10.27	2.55
Total employment (including working proprietors)	Thousands 195.8	Thousands 205.0	Thousands 182.4	Thousands 29.42	Thousands 7.07

(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

Larger establishments

TABLE 2 (i)

	Unit	Great Britain 1948	United Kingdom	
			1951	1954
FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS				
Number of establishments	No.	1,881	1,914	1,681
Total value of sales and work done	£'000	138,661	185,842	200,404
Products on hand for sale		205	413	573
and work in progress	{ at beginning of year			
	{ change during year	+ 14	+ 124	- 51
Gross output (production) (a)		137,505	185,967	200,353
Bread subsidy payable by the Ministry of Food in respect of flour converted into bread		5,484	5,791	22,132
Purchases of materials and fuel		79,425	120,298	140,030
Amount payable to the Ministry of Food under the Biscuits (Charges) Orders in respect of flour used in the manufacture of biscuits		80	122	(b)
Stocks of materials and fuel	{ at beginning of year	6,318	9,408	8,521
	{ change during year	+ 275	+ 3,310	- 779
Cost of materials and fuel used		79,150	116,988	140,809
Payment for work done on materials given out		19	16	22
Payment for transport (c)		1,169	2,826	3,356
Net output		63,740	71,806	78,298
Average number of employees	{ operatives (d)	No. 98,201	119,187	111,837
	{ others	" 10,984(e)	12,344	12,387
Total employment (d) (f)		" 109,640	132,039	124,628
Net output per person employed (f)	£	581	544	628
Wages and salaries	{ of operatives (d)	£'000 26,072	35,850	40,525
	{ of others	" 4,237	5,140	6,009
Capital expenditure				
New building work (g)		926	1,929	1,960
Plant and machinery	{ acquisitions (g)	" 2,776	4,548	4,707
	{ disposals	" 114	206	146
Vehicles	{ acquisitions (g)	" 1,622	1,876	1,775
	{ disposals	" 179	274	220

(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) Not applicable to 1954.

(c) 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.

(d) Including roundsmen and shop assistants. For details see Table 10 (footnotes (b) and (c)).

(e) Number in week ended September 25, 1948.

(f) Excluding outworkers and including working proprietors.

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

BREAD AND FLOUR CONFECTIONERY

Small firms in Great Britain (a)

TABLE 2 (ii)

	Unit	1948	1951	1954
Number of returns	No.	15,140	13,224	10,768
Gross output (sales) (b)	£'000	82,107	77,087	69,923
Purchases of materials and fuel (c)	"	..	..	..
Average number of persons employed (d)	No.	51,196	43,756	33,532
Males	"	13,800	15,481	12,495
Females	"	64,996	59,237	46,027
Total	"			

(a) Firms, employing on the average 10 or fewer persons other than shop assistants and operatives (e.g. roundsmen) not engaged in actual manufacturing, that made satisfactory returns. In 1954, there were 335 small firms in Northern Ireland employing 1,155 persons (534 males and 621 females).

(b) The values of gross output (sales) represent firms' own products. The values of all other sales were £12,791,000 in 1948, £17,510,000 in 1951 and £23,617,000 in 1954.

(c) The only particulars of materials and fuel ascertained from small firms in Great Britain related to quantities of flour purchased and used, as follows:

1948 - 9,830,000 sacks of 280 lb.
1951 - 6,600,000 sacks of 280 lb.
1954 - 4,855,000 sacks of 280 lb.

(d) Persons employed in the bakehouse or in making flour confectionery, and roundsmen, including working proprietors. The average numbers of all persons employed, including working proprietors, whether employed in production or in the sale or delivery of goods (i.e. including also shop assistants and waitresses) were as follows:

	1948	1951	1954
Males	56,209	47,347	37,968
Females	42,630	39,980	37,798
Total	98,839	87,327	75,766

In addition, Government Departments (prisons) in Scotland, employing 9 males, recorded sales of £5,000.

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		
	Number	£'000	£'000	Number	Number	£'000	£'000	£'000	£
11 - 24(c)	499	10,890	4,503	6,965	649	2,418	285	303	582
25 - 49	570	28,160	11,655	18,061	1,779	6,070	834	1,305	582
50 - 99	323	35,480	14,074	20,133	1,980	7,269	998	1,429	635
100 - 199	173	39,789	15,331	21,831	2,274	8,228	1,079	1,552	635
200 - 299	54	21,397	8,510	12,170	1,373	4,456	681	1,160	628
300 - 399	22	13,954	5,387	6,615	793	2,578	384	708	727
400 - 499	13	9,849	4,044	5,063	542	2,045	273	435	722
500 - 749	14	13,804	5,183	7,190	1,034	2,573	546	835	630
750 - 999	6	7,809	3,282	4,777	482	1,646	277	186	624
1,000 - 1,499	4	6,418	2,323	4,017	732	1,305	271	191	489
1,500 and over	3	12,804	4,006	5,015	749	1,937	380	339	695
Total	1,681	200,353	78,298	111,837	12,387	40,525	6,009	8,443	628

(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.

TABLE 4 - Analysis according to specialisation within the industry, 1954

Larger establishments in the United Kingdom

No specialisation within this industry was distinguished.

BREAD AND FLOUR CONFECTIONERY

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 (a)

TABLE 5 (i)

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
Bread, sold in loaves of 14oz. or in multiples of 14oz.	Th.cwt.	£'000	Th.cwt.	£'000	Number
National	47,422	72,932(b)	44,764	86,748	1,093
National brown	..	..	2,209	4,619	727
White (i.e. made of flour of a lower extraction than national)	..	..	647	1,970	684
Other (proprietary brown, rye, malt, fruit, etc.)	3,483	8,575	1,998	6,987	1,037
Unclassified	..	..	1,414	2,829	77
			..	1,192	
Other bread sold in rolls or loaves	4,622	8,990	1,915	7,383	1,000
	..	629	..	1,138	
Flour confectionery					
Slab or size cake, sold by weight	1,572	16,945	1,491	14,582	953
Sponge goods	1,358	14,865	1,182	13,268	963
			..	2,283	
Tea-bread and scones, including crumpets, muffins, etc.	2,056	11,141	1,763	10,797	1,032
			..	2,047	
Puddings and trifles (excluding meat and fish puddings)					
Christmas puddings (c)	169	1,691	132	1,341	164
Other (c)	83	679	32	287	135
	..	86	..	149	
Other flour confectionery	..	37,350	..	33,728	1,110
Unclassified	..	10,718	..	4,044	121
Other bakery products	44	276	21	278	102
	..	75	..	238	
Waste products including bakery products sold as waste	..	473	..	492	752
Work done for the trade or on commission (d)		100		41	11
Total		185,526		196,440	..
Sales in other industries (see Table 6)		5,248		3,358	..
Principal products of this industry sold by establishments in the industry		180,278		193,081	1,420

(a) For output of small firms see Table 5 (ii).

(b) Including other bread on which baking subsidy is receivable.

(c) Including some canned puddings not recorded separately.

(d) Amount charged.

Total sales by small firms in Great Britain (a)

TABLE 5 (ii)

	1951		1954	
	Quantity	Value	Quantity	Value
Bread	Th.cwt.	£'000	Th.cwt.	£'000
	17,699	30,300	12,690	28,473
Flour confectionery, etc.	..	46,787	..	41,449
Total (b)		77,087		69,923

(a) Firms, employing on the average 10 or fewer persons other than shop assistants and operatives (e.g. roundsmen) not engaged in actual manufacturing that made satisfactory returns.

(b) The total values represent firms' own products. The values of all other sales were £17,510,000 in 1951 and £23,617,000 in 1954.

BREAD AND FLOUR CONFECTIONERY
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	
Bread				
Loaves and rolls, unclassified	16	36	6	8A, 8D, 9G
	..	47		
Flour confectionery				
Slab or size cake, sold by weight, sponge goods, tea-bread and scones, including crumpets, muffins, etc.	155	1,883	22	8C, 8D
Christmas puddings (b)	91	927	45	8C, 8D, 8J, 9G
Other flour confectionery	..	384	20	
Unclassified	..	60	5	
Other bakery products	2	19	..	
	..	3		
Total		3,358	..	

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

(b) Including some canned Christmas puddings not recorded separately.

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

TABLE 7

	1954	
	Quantity	Value
	Th.cwt.	£'000
Meat puddings and pies	345	3,271
	..	802
Cereal filler (sausage rusk)	54	145
Oatcakes	12	79
	..	37
Biscuits for human consumption		
Whole		
Sweetened		
Fully or partially chocolate coated	17	224
	..	146
Other kinds	130	1,114
Unsweetened	37	313
	..	55
Sausages		
Uncooked		
Pork	17	221
Beef	8	77
	Th.gal.	
Ice cream sold in bulk	126	74
	Th.cwt.	
Self-raising flour	178	501
Chocolate and sugar confectionery	3	32
	..	15
Other goods	..	219
Total		7,323

(89985)

BREAD AND FLOUR CONFECTIONERY
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(a)

TABLE 9

	Quantity	Cost
	Th. sacks of 280lb.	£'000
Materials		
Wheat meal and flour (other than self-raising flour and semolina)		
National flour	15,557	72,121
Wholemeal National brown, and other flours of higher extraction than National flour	1,092	5,060
Flours of lower extraction than National flour	1,024	5,054
Self-raising flour	31	164
Semolina	6	35
Other meals and flours (except potato flour)	186	1,097
	Th.cwt.	
Eggs not in shell	422	6,123
Butter	18	289
Margarine and compound cooking fats	1,060	7,564
Animal lard	20	140
Refined vegetable oils	163	1,068
Milk powder	83	316
Sugar	1,617	5,050
Glucose	30	91
Syrup and treacle	54	173
Dried fruits including candied or dried peel	628	3,343
Fruit curds and fruit pulp	86	444
Marmalade and jams including jelly jams	328	1,539
Chocolate couverture, block chocolate and chocolate powder	112	1,520
Potatoes and potato flour	66	104
Flavouring essences and compounds and colours	..	379
Raw meat	128	1,379
	..	328
Aerating powder	54	241
Yeast	517	1,593
Salt	730	288
Water	..	99
Other ingredients	..	6,446
Packing materials		
Oiled, waxed and other waterproofed paper wrappings	414	3,030
	..	845
Cardboard boxes, cartons and fibre-board packing cases	159	728
	..	1,038
Tin containers	4	43
	..	65
Other packing materials	..	1,781
All other purchased materials	..	2,786
Fuel and electricity		
Coal	Th. tons	
	67	289
Coke	136	742
Liquid fuel (including creosote/pitch mixtures)		
For use in internal combustion engines		
Motor spirit (petrol) for use in road vehicles and derv. fuel	Th.gal.	
	13,108	2,489
Other	468	25

(89985)

TABLE 9 (contd.)

	Quantity	Cost
Fuel and electricity (contd.)	Th.gal.	£'000
Liquid fuel (including creosote/pitch mixtures) (contd.)		
For burning in furnaces, boilers, kilns, etc.	21,803	1,015
Gas purchased	Th.therms	
From Gas Boards	34,917	1,826
From other sources, including other departments of the same firms	..	248
Electricity purchased (b)	Th.kWh.	
From Electricity Boards	146,752	825
From other sources, including other departments of the same firms	..	157
All other purchased fuel	..	2
		5
		38
Total cost		140,030

(d) For the quantity of flour used by small firms see footnote (c) to Table 2(ii). No other particulars of materials, and fuel purchased or used were ascertained from small firms in this industry.

(b) Owing to the risk of disclosure of details relating to individual firms, particulars of electricity generated at firms' own establishments cannot be published.

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 (b)	119,187	111,837
Administrative, technical and clerical employees	12,344	12,387
Total (b)	131,531	124,224
	£'000	£'000
Wages and salaries paid to		
Operatives (c)	35,850	40,525
Administrative, technical and clerical employees	5,140	6,009
Total (c)	40,991	46,534
	£	£
Wages and salaries per head		
Operatives	301	362
Administrative, technical and clerical employees	416	485
		£'000
Superannuation and other pension funds for employees and dependents (d)		
Employers' contributions	..	631

TABLE 10 (contd.)

	1951	1954
Superannuation and other pension funds for employees and dependents (d) (contd.)		Number
Employees covered	..	40,120
		£'000
Pension, etc. payments to former employees and dependents (d)	..	77

(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
Canteen workers	Number	Number
Male	38	55
Female	751	761
Total	789	816
Other workers		
Male	1,346	2,020
Female	2,080	2,377
Total	3,426	4,397
Total excluded employees	4,215	5,213

(b) Including other operatives (e.g. roundsmen) and shop assistants, shown below.

	1951	1954
Other operatives (e.g. roundsmen)	28,892	29,776
Shop assistants	13,633	13,089

(c) Including payments to shop assistants which amounted to £2,432,000 in 1951 and £2,782,000 in 1954.

(d) 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	415	93	508	332	72	404
Operatives (b)	77,084	42,664	119,748	72,211	41,034	113,245
Administrative, technical and clerical employees	5,851	6,524	12,375	5,992	6,673	12,665
Total employees	82,935	49,188	132,123	78,203	47,707	125,910

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

(b) Including other operatives (e.g. roundsmen) and shop assistants shown below.

	1951	1954
Other operatives (e.g. roundsmen)	Number	Number
Male	27,246	27,148
Female	1,884	2,523
Total	29,130	29,671
Shop assistants		
Male	245	333
Female	13,408	12,908
Total	13,653	13,241

LIST OF INDUSTRY REPORTS

VOLUME 1

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

VOLUME 2

- A. Coke Ovens and By-products
- B. Dyes and Dyestuffs
- C. Fertiliser, Disinfectant, Insecticide and Allied Industries
- D. Coal Tar Products
- E. Chemicals (General)
- F. Drugs and Pharmaceutical Preparations
- G. Toilet Preparations and Perfumery
- H. Explosives and Fireworks
- I. Paint 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 Industries
- R. Plastics Materials

VOLUME 3

- A. Blast Furnaces
- B. Iron and Steel (Melting and Rolling)
- C. Iron Foundries
- D. Steel Sheets
- E. Tinplate
- F. Wrought Iron and Steel Tubes
- G. Non-Ferrous Metals (Smelting, Rolling, etc.)
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- H. Jute
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- L. Carpets
- M. Narrow Fabrics
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- F. Milk Products
- G. Ice Cream
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- D. Vinegar and Other Condiments
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- F. Ice
- G. Miscellaneous Preserved Foods
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- B. Furniture and Upholstery
- C. Soft Furnishings
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- F. Paper and Board
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- C. Brushes and Brooms
- D. Toys and Games
- E. Sports Requisites
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- H. Cinematograph Film Printing
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- J. Incandescent Mantles

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