



BOARD OF TRADE

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[HA 251]

Report on the Census of Production 1963

7 Grain milling



LONDON: HER MAJESTY'S STATIONERY OFFICE

Price 3s. 6d. net

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

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Notes

These notes give the main information needed for interpreting the figures in the industry reports. (More detailed information about the Census is given in a separate booklet - 'Introductory Notes': Part 1 of the Report on the Census of Production for 1963.)

GENERAL INFORMATION

Changes in the 1963 census

There were few changes resulting from amendments to the Standard Industrial Classification and only minor changes in the scope of certain industry reports compared with 1958. Any such changes are explained in the introductions to the industry reports concerned or by footnotes to the tables.

Industrial Classification

Establishments were classified to industries on the basis of major activity in conformity with the second edition of the Standard Industrial Classification (Consolidated Edition 1963, incorporating Amendment 1). Each industry was basically defined in terms of its principal products, these being of a similar nature or commonly associated in production. Normally, an establishment was classified to an industry if its sales of the principal products of that industry accounted for a greater proportion of its total sales than did its sales of the principal products of any other industry. However, where the application of this rule would have resulted in a change of classification between 1958 and 1963, the establishment was reclassified only if the sales of principal products of the newly predominant industry was more than one third greater than the sales of principal products of the previously predominant industry. This modification of the general rule was introduced for 1958 to avoid discontinuities which would result from marginal changes in sales between successive censuses.

The principle of classification by major output was also normally followed in compiling the analysis by sub-divisions of an industry.

In certain industries, classification was dealt with in a different way. Details of any non-standard treatment are given in the introductions to the relevant industry reports.

TERMS USED IN THE CENSUS REPORT

Average number employed

Firms were required to state the number of persons on the payroll (i.e. whose National Insurance cards were held by them) on the average during the year of return, whether full-time or part-time employees. Separate figures were required for (a) administrative, technical and clerical employees and (b) operatives (see below). Averages could be calculated from figures relating to the last week of each calendar month; figures shown in respect of the average number employed relate to the sum of these averages. Firms were also required to state the number of working proprietors (see below) where appropriate and these are included in total employment figures. Outworkers are excluded.

The figures include persons engaged in merchandising or factoring and canteen workers where particulars in respect of these activities could not be excluded from the return.

Working Proprietors

These include all persons regarded as 'self-employed' for National Insurance purposes, and members of their families who worked in the business without receiving a fixed wage or salary; but persons who worked less than half the normal number of working hours are excluded. For Great Britain, directors working in the business but not in receipt of a definite wage, salary or commission are included under this heading for 1963, but are excluded for 1958. For Northern Ireland, directors of limited companies, other than those paid by fee only, are included for both years. (Directors paid by fee only are not included in any of the employment figures for either year.)

Employees

(i) Administrative, technical and clerical employees include managers, superintendents and works foremen; research, experimental, development, technical and design employees (other than operatives); draughtsmen and tracers; editorial staff, staff reporters, canvassers, competition and advertising staff; travellers; and office (including works office) employees. For Great Britain, but not for Northern Ireland, they include also managing and other directors in receipt of a definite wage, salary or commission.

(ii) Operatives include all other classes of employees, that is, broadly speaking, all manual wage earners. They include those employed in and about the factory or works; operatives employed in power houses, transport work, stores, warehouses, shops and canteens; inspectors, viewers and similar workers; maintenance workers; and cleaners. Operatives engaged in outside work of erection, fitting, etc. are also included, but outworkers (i.e. persons employed by the firm who worked in their own homes, etc. on materials supplied by the firm) are excluded. Information about the numbers of outworkers employed was collected only for the gloves industry.

Capital Expenditure

(i) New building work.

This represents the cost incurred during the year of new building and other new constructional work (including office buildings, canteens and the like used in connection with the business covered by the return but not dwelling houses for employees). The value is that charged to capital account during the year of return; it includes expenditure on new buildings or on the extension or reconstruction of old buildings, the value of work of a capital nature carried out by firms' own staff, and the cost of any newly constructed buildings purchased. The figures shown include any legal charges, stamp duties, agents' commissions, etc.

7 Grain milling

This Report on the Grain Milling Industry relates to establishments engaged wholly or mainly in milling wheat (including the production of self-raising and patent flour and animal and poultry feeding stuffs at milling establishments); milling, flaking or rolling barley, oats, rye, rice, etc., and splitting or grinding peas, beans, lentils, soya beans, sage and tapioca or manufacturing ready-to-eat breakfast cereals such as cornflakes, puffed or shredded wheat.

This industry corresponds to minimum list heading 211 in the Standard Industrial Classification (Consolidated edition, 1963).

METHOD OF CLASSIFICATION

The following adaptations to the standard classification procedure were made to bring within scope of this industry grain milling firms with substantial sales of self-raising flour or of animal and poultry foods, which otherwise would have been classified to the Starch and Miscellaneous Foods Industry or the Animal and Poultry Foods Industry, respectively.

First, sales of self-raising flour were treated equally as principal products of the Grain Milling Industry and the Starch and Miscellaneous Foods Industry unless they amounted to more than 85 per cent. of total output, in which case the return was classified to the Starch and Miscellaneous Foods Industry. Secondly, in returns where sales of milled products for human consumption accounted for at least 15 per cent. of total output, sales of feeding stuffs for animals, poultry, etc. (other than canned foods for dogs and cats) were counted equally as principal products of the Grain Milling Industry and the Animal and Poultry Foods Industry.

The classification of returns to the sub-divisions of this industry followed the standard procedure.

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

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TABLE 1 Industry summary: United Kingdom

Estimates for all firms, 1958 and 1963 (a)

	Unit	1958	1963
Number of enterprises	No.	542	408
Number of establishments	"	682	547
Gross output	£'000	321,449	338,492
Net output	"	67,604	80,721
Net output per head	£	1,992	2,557
Sales and work done	£'000	287,360	307,098(b)
	{		
	goods produced and work done		
	merchanted goods and canteen takings	34,251	31,277
Purchases	"	246,560	224,993
	{		
	materials for processing and packaging, and fuel		
	goods for merchandising and canteen purchases		27,696
Payments to other organisations	"	15	63
	{		
	for work done on materials given out	8,305	7,383
	for transport		
Stocks and work in progress			
Total stocks and work in progress	"	+ 872	+ 2,480
	{		
	change during year		
	at end of year	33,282	37,042
Goods on hand for sale	"	- 261	+ 90
	{		
	change during year		
	at end of year	6,670	8,772
Work in progress	"	+ 99	+ 26
	{		
	change during year		
	at end of year	280	433
Materials, stores and fuel	"	+ 1,034	+ 2,364
	{		
	change during year		
	at end of year	26,332	27,837
Average number employed	Th.	33.9	31.6
	{		
	total, including working proprietors		
	operatives	24.4	22.2
	other employees (c)	9.4	8.9
Wages and salaries	£'000	14,007	16,805
	{		
	of operatives		
	of other employees (c)	7,071	8,682
Employers' contributions to National Insurance and private pension schemes, etc. (d)	"	..	2,228
Capital expenditure (e)			
Total	"	..	9,157
New building work	"	1,248	2,981
Land and existing buildings (f)	"	..	- 258
Plant and machinery (f)	"	3,405	5,625
Vehicles (f)	"	750	810

(a) For 1963, estimates for small firms and for firms not making satisfactory returns accounted for about 10 per cent. of the total figures in which they were incorporated. (For 1958 the comparable figure was 11 per cent.) A summary of the detailed returns received is given in Table 2.

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

(c) Administrative, technical and clerical employees.

(d) Including pensions and gratuities paid other than from pension funds.

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

(f) Acquisitions less disposals.

TABLE 2 Analysis of larger firms by sub-divisions within the industry, 1958 and 1963
Firms employing 25 or more persons: United Kingdom (a)

	Unit	Sub-divisions of the industry (b)			Total		
		Cereal products other than breakfast foods in packets for retail sale		Cereal breakfast foods in packets for retail sale			
		Wheat	Oat, barley, maize, rice and other cereal products 21 and 22				
		10	21 and 22	23	1958	1963	
Number of enterprises	No.	61	20	7	134	88	
Number of establishments	"	156	35	9	223	200	
Gross output	£'000	237,825	26,459	41,753	284,683	306,036	
Net output	"	49,223	3,440	20,318	59,872	72,981	
Net output per head	£	2,334	1,634	3,797	1,992	2,557	
Sales and work done	£'000	216,939(c)	20,245(c)	40,469(c)	254,493	277,652(c)	
Sales of characteristic products	"	goods produced and work done	20,663	6,459	1,157	30,333	28,278
		merchanted goods and canteen takings	158,544	12,332	31,427	(d)	(d)
Index of specialisation (e)	Per cent.	73	61	78	78	76	
Purchases	£'000	materials for processing and packaging, and fuel	167,283	16,740	19,397	218,359	203,420
		goods for merchandising and canteen purchases	18,131	5,844	1,066		25,041
Payments to other organisations	"	for work done on materials given out	4,949	281	1,502	13	57
		for transport				7,355	6,675
Stocks and work in progress							
Goods on hand for sale	"	change during year	+ 299	- 239	+ 22	- 231	+ 82
		at end of year	5,739	1,162	1,030	5,907	7,931
Work in progress	"	change during year	- 76	- 6	+ 106	+ 88	+ 24
		at end of year	148	19	225	248	392
Materials, stores and fuel	"	change during year	+ 1,761	- 154	+ 531	+ 916	+ 2,137
		at end of year	19,459	2,173	3,537	23,320	25,168
Average number employed	No.	total, including working proprietors	21,087	2,105	5,351	30,059	28,543
		operatives	14,877	1,589	3,821	21,708	20,287
		other employees (f)	6,175	490	1,530	8,311	8,195
Wages and salaries	£'000	of operatives	11,113	1,158	3,117	12,445	15,389
		of other employees (f)	5,789	502	1,659	6,283	7,950
Wages and salaries per head	£	operatives	747	729	816	573	759
		other employees (f)	937	1,025	1,084	756	970
Employers' contributions to National Insurance (g)	£'000	630	64	151	..	845	
Employers' contributions to private pension schemes, etc. (h)	"	813	101	281	..	1,196	
Capital expenditure (i)							
New building work	"	1,402			1,105	2,695	
Land and existing buildings	"	acquisitions	71	416	2,500	..	177
		disposals	400			..	410
Plant and machinery	"	acquisitions	3,752			3,077	5,260
		disposals	89	29	56	61	174
Vehicles	"	acquisitions	794	78	266	998	1,138
		disposals	220	21	165	333	406

For notes to this table - see page 7/6

TABLE 3 Analysis of larger firms by size of enterprise within the industry, 1963
(i) Output, employment, capital expenditure and stocks

Firms employing 25 or more persons: United Kingdom

Average number employed by the enterprise in the industry (a)	Enterprises	Establishments	Average number employed (a)	Gross output	Net output	Net output per head	Capital expenditure (b)	Total value of stocks and work in progress at end of year
	Number	Number	Number	£'000	£'000	£	£'000	£'000
25-49	26	30	959	10,576	1,920	2,002	195	1,075
50-99	32	41	2,229	24,220	3,852	1,728	492	2,639
100-199	13	20	1,702	17,558	3,452	2,028	411	2,218
200-299	4	7	985	10,431	2,500	2,538	280	1,575
300-399	3	6	997	12,672	1,890	1,895	346	1,290
400-999	3	9	1,789	17,382	4,652	2,600	344	1,940
1,000-1,499	4	34	5,132	52,672	13,668	2,663	2,014	7,306
1,500 and over	3	53	14,750	160,525	41,049	2,783	4,196	15,446
Total	88	200	28,543	306,036	72,981	2,557	8,279	33,491

(ii) Employees, wages and salaries, and employers' contributions

Firms employing 25 or more persons: United Kingdom

Average number employed by the enterprise in the industry (a)	Employees		Wages and salaries		Employers' contributions		Wages and salaries per head	
	Operatives	Others (c)	Operatives	Others (c)	National Insurance (d)	Private pension schemes, etc. (e)	Operatives	Others (c)
	Number	Number	£'000	£'000	£'000	£'000	£	£
25-49	718	219	471	227	28	51	656	1,035
50-99	1,551	654	1,124	635	70	65	725	971
100-199	1,264	430	915	367	48	48	724	854
200-299	784	201	520	205	29	34	664	1,020
300-399	826	168	632	183	32	17	765	1,089
400-999	1,325	462	925	407	49	24	698	881
1,000-1,499	3,871	1,260	3,009	1,284	164	170	777	1,019
1,500 and over	9,948	4,801	7,792	4,642	426	786	783	967
Total	20,287	8,195	15,389	7,950	845	1,196	759	970

(a) Including working proprietors.

(b) Acquisitions less disposals.

(c) Administrative, technical and clerical employees.

(d) Including both flat rate and graduated contributions.

(e) Including pensions and gratuities paid other than from pension funds. These amounted in total to £406,000.

TABLE 4 Percentage analysis of employees, by age and sex, all firms, 1963: United Kingdom (a)

Ages	Males	Females	All employees
	Per cent.	Per cent.	Per cent.
Under 18	3	2	5
18 and over	78	17	95
All ages	81	19	100

Source: Ministry of Labour

(a) The percentages relate to the numbers employed (excluding working proprietors) at mid-June, 1963.

Footnotes to Table 2.

(a) The following information relates to small firms (employing fewer than 25 persons) in this industry. It includes an estimate for small firms not making satisfactory returns, which account for 2 per cent. of the employment shown for 1963 and 3 per cent. for 1958.

	1958	1963
Number of firms	547	345
Average number employed:		
Working proprietors	3,768	406
Other persons employed		2,577

(b) The method of classifying returns to sub-divisions of the industry is explained in the notes; the characteristic products of each sub-division are identified in Table 5. Owing to changes in coverage of sub-divisions between 1958 and 1963 it is only possible to show a total column for 1958.

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

(d) Characteristic products relate only to sub-division of the industry.

(e) For sub-division of the industry, this is the ratio of sales of characteristic products to total sales of goods produced and work done. For the industry as a whole, this is the ratio of total sales of principal products by the industry to total sales of goods produced and work done.

(f) Administrative, technical and clerical employees.

(g) Including both flat rate and graduated contributions.

(h) Including pensions and gratuities paid other than from pension funds.

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

TABLE 5 Sales of principal products of the industry by larger firms, including sales by establishments classified to other industries, 1958 and 1963

Firms employing 25 or more persons: United Kingdom

Industry sub-division (a)	1958		1963			
	Quantity	Value	Quantity	Value	Enterprises	Entries
10	Th. tons	£'000	Th. tons	£'000	Number	Number
Wheat products						
Meal and flour (other than self-raising flour and semolina)						
White flour for breadmaking	2,568	96,907	2,478	96,814	60	121
Other white flour	614	22,427	733	26,300	50	96
High extraction flours (including wheatmeal)	167	6,338	234	10,484	53	99
Semolina	17.1	862	14.8	825	22	36
Meal and flour (other than self-raising flour) and semolina unclassified	21.9	844	-	-		
Bran, pollard, sharps and middlings (including weatings and superfine weatings) and other wheat products and by-products (other than cereal breakfast foods in packets for retail sale)	1,264	29,063	1,224	25,843	95	161
Total wheat products (other than cereal breakfast foods in packets for retail sale)	4,652	156,441	4,684	160,267	..	..
21						
Oat products (b)						
Meal and groats	13.1	699	7.9	365	20	20
Rolled oats, oat flakes and oat flour	53.1	4,831	16.9	752	27	34
Crushed and ground oats and other oat products and by-products (other than cereal breakfast foods in packets for retail sale)	71.1	1,770	46.0	910	125	154
Unclassified	3.3	202				
Total oat products (other than cereal breakfast foods in packets for retail sale)	141	7,502(b)	70.8	2,027	..	..
22						
Barley products						
Meal	61.5	1,611	120	2,998	139	184
Barley flour, and pearled, blocked, flaked, puffed and pot barley	14.0	466	22.6	756	23	32
Other barley products and by-products (other than cereal breakfast foods in packets for retail sale)	59.7	1,470(b)	66.3	1,739	69	80
Total barley products (other than cereal breakfast foods in packets for retail sale)	135	3,547	208	5,493	..	..

Continued on next page

TABLE 5 (continued)

Industry sub-division (a)	1958		1963			
	Quantity	Value	Quantity	Value	Enter-prises	Entries
22	Th. tons	£'000	Th. tons	£'000	Number	Number
Maize products						
Flaked maize						
For human consumption	} 259	14,599 (b)	8.5	334	*	*
Not for human consumption			268	7,556	46	65
Meal and flour and other maize products and by-products (other than cereal breakfast foods in packets for retail sale)	224	5,892	247	6,763	117	159
Total maize products (other than cereal breakfast foods in packets for retail sale)	482	20,491 (b)	523	14,653	..	..
22						
Rice whole (husked or cleaned) and rice products (other than rice puddings canned and cereal breakfast foods in packets for retail sale)	48.6	4,879 (b)	70.5	4,363	14	17
23						
Cereal breakfast foods in packets for retail sale						
Wheat	52.6	9,756	53.2	11,228	8	8
Maize	} ..	(c)	57.8	12,665	5	5
Other (including mixed)			51.6	8,214	10	10
Total cereal breakfast foods in packets for retail sale	..	..	163	32,107	..	..
22						
Soya meal flour and by-products	12.3	931	19.6	1,495	5	5
22						
Rye meal, flour and by-products, pea and bean meal and flour, and other meal, flour and by-products (except compound meals)	13.2	460	4.6	260	13	13
22						
Split lentils and split peas	13.1	1,121	12.8	1,010	*	*
Other products	..	594	..	339	16	16
Waste products	..	..	..	6	6	6
Work done						
22						
Milling done by grist millers and others on commission		59		20	12	13
Other work done, on commission, sub-contract work, etc.		490		210	12	19
Total		206,271		222,446	..	..
Sales in other industries (see Table 6)		8,029		10,666	..	..
Principal products of this industry sold by establishments in the industry		198,242		211,781	88	148 (d)

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

(b) Including cereal breakfast foods in packets for retail sale in 1958.

(c) Not recorded separately in 1958.

(d) This figure represents the total number of returns made by larger firms in this industry which is less than the total number of establishments shown in Table 2 on account of combined returns covering more than one establishment.

TABLE 6 Sales of principal products of the industry by establishments classified to other industries, 1958 and 1963

Firms employing 25 or more persons: United Kingdom

	1958		1963			
	Quantity	Value	Quantity	Value	Entries	Principal industries in which produced (a)
	Th. tons	£'000	Th. tons	£'000	Number	
Wheat products						
Meal and flour including semolina (excluding self-raising flour)	5.6	278	27.9	1,237	*	8,15,17
Bran, pollard, sharps and middlings (including weatings and superfine weatings) and other wheat products and by-products (other than cereal breakfast foods in packets for retail sale)	16.2	392	18.7	473	41	15
Total wheat products (other than cereal breakfast foods in packets for retail sale)	21.8	670	46.6	1,710	..	
Oat products						
Crushed and ground oats			13.8	364	93	15
Other oat products and by-products including meal and groats and rolled oats (other than cereal breakfast foods in packets for retail sale)	} 20.4	617 (b)	1.9	76	6	15,17
Total oat products (other than cereal breakfast foods in packets for retail sale)			20.4	617	15.7	439
Barley products						
Meal	33.1	882	52.4	1,813	110	15,17
Other barley products and by-products	20.1	525 (b)	26.6	731	59	15,17,18
Total barley products (other than cereal breakfast foods in packets for retail sale)	53.2	1,407	79.0	2,043	..	
Maize products						
Flaked maize	..	(c)	108	3,101	32	15
Meal and flour and other maize products and by-products (other than cereal breakfast foods in packets for retail sale)	83.3	2,246	78.2	2,178	92	15,17
Total maize products	83.3	2,246	187	5,279	..	
Rice whole (husked or cleaned) and rice products (other than rice puddings canned and cereal breakfast foods in packets for retail sale)	3.3	247 (d)	2.0	172	*	11,15,17

Continued on next page

TABLE 6 (continued)

	1958		1963			Principal industries in which produced (a)
	Quantity	Value	Quantity	Value	Entries	
	Th. tons	£'000	Th. tons	£'000	Number	
Cereal breakfast foods in packets for retail sale						
Wheat	1.8	292	0.3	80	*	17
Maize	76.1	2,195(c)				
Other (including mixed)	..	..	3.2	519	*	11,17
Total cereal breakfast foods in packets for retail sale	..	..	3.5	599	..	
Soya meal flour and by-products, rye meal, flour and by-products, pea and bean meal and flour, and other meal, flour and by-products (except compound meals), grain products for human consumption, split lentils and split peas (e)	5.3	333	..	423	9	15,17
Milling done by grist millers and others on commission		20	-	-		
Total		8,029		10,666	..	

- (a) The references given are to the list of industries at the back of this report.
- (b) May include figures for cereal breakfast foods in packets for retail sale.
- (c) Including other flaked maize which in 1963 is included with Maize products.
- (d) Including breakfast foods, packaged for retail sale.
- (e) Described in 1958 as rye meal, soya meal, pea and bean meal, flour and by-products.

TABLE 7 Sales of other than principal products by larger firms in the industry, 1958 and 1963

Firms employing 25 or more persons: United Kingdom

	1958		1963	
	Quantity	Value	Quantity	Value
	Th. tons	£'000	Th. tons	£'000
Compound feeding stuffs (except dog and cat foods) for animals, poultry, etc., (including molassed feeds containing not less than 30 per cent. molasses)	1,377	43,756	1,385	44,366
Other animal and poultry feeding stuffs, including dog and cat foods			171	7,798
Self-raising flour	Th. cwt. 4,080	10,105	Th. cwt. 3,277	8,215
Miscellaneous food products	2,940	1,905	..	3,864
Other goods and work done	..	485	..	1,082
Services rendered to other organisations (a)	..	..	..	547
Total value of goods sold without having been subjected to any manufacturing process (merchanted or factored)	..	30,268	..	28,134
Canteen takings	..	66	..	144
Total		86,586(b)		94,150

- (a) Amounts charged for hiring out plant, machinery or other goods, for providing transport, or for technical or other services rendered to other organisations.
- (b) Excluding amounts charged for services rendered to other organisations.

TABLE 8 Production of certain principal products of the industry by larger firms, including production by establishments classified to other industries, 1958 and 1963

This table is not applicable to this industry.

TABLE 9 Purchases of selected principal products of the industry by larger firms, 1963

This table is not applicable to this industry.

TABLE 10 Purchases by larger firms in the industry, 1954 and 1963
Firms employing 25 or more persons: United Kingdom

	1954		1963	
	Quantity	Cost	Quantity	Cost
		£'000		£'000
Materials for processing				
Wheat				
Home grown	..	37,798	..	34,286
Imported	..	99,423	..	94,768
Oats				
Home grown	..	2,798	..	1,967
Imported	..	523	..	618
Barley				
Home grown	..	4,230	..	6,407
Imported	..	4,583	..	1,349
Maize	..	11,080	..	17,116
Rice	..	1,971	..	4,333
Soya beans	}	2,774	..	999
Peas, beans (other than soya beans) and lentils			..	1,347
Wheat flour purchased for blending with millers' own products				
Home produced	}	4,220	..	1,592
Imported			..	452
Wheat offals purchased for further manufacturing or for mixing with millers' own products				
Home produced	}	1,097	..	549
Imported			..	697
Oil seed cake and meal				
Home produced	}	4,062	..	1,045
Imported			..	4,948
Groats and oatmeal (including pinhead oatmeal) used for further processing or manufacture	..	(a)	..	195
Molasses	591
Milk products (including whey and buttermilk powder)	193
Meat meal, meat and bone meal, bone meal and sterilized bone flour	922
Fish meal and fish waste	2,633
Sugar	1,192
Chemical and mineral additives (including vitamins, phosphates, calcium, etc.)	3,263
Lubricating oils and greases	Th. gal. 87.8	28 4
Replacement parts for firms' own machinery, plant and vehicles, and accessories and consumable tools bought as replacement	..	1,260	..	1,418
All other materials for processing	..	9,438	..	6,589

TABLE 10 (continued)

	1954		1963	
	Quantity	Cost	Quantity	Cost
		£'000		£'000
Packaging materials				
Paper and board				
Boxes, cartons, packing cases, and drums and canisters (with or without metal ends) of paper, cardboard and fibreboard	..	..	..	3,774
Multiwall paper sacks	..	234	47.3	1,380
Wrapping paper (including paper coated with plastics and any laminates incorporating paper but not metal), moulded pulp units, labels and other packaging materials of paper, cardboard and fibreboard	..	..	..	994
Cans and metal boxes	..	..	..	42
Transparent cellulose film (including bags)	..	..	..	131
Jute and hessian piece goods, sacks and bags	..	2,635	..	2,909
All other packaging materials	..	4,860	..	338
Fuel and electricity (b)	Th. tons		Th. tons	
Coal	188	760	82.4	489
Coke (including screenings) and manufactured fuel	{ 4.1 ..	{ 21 3	{ 2.1	{ 19
Derv fuel and motor spirit for use in road vehicles	Th. gal. 2,900	555	Th. gal. 3,058	600
Other liquid fuels (including creosote/pitch mixtures, etc., and liquefied petroleum gases)	{ 1,989 ..	{ 90 9	{ 6,653	{ 277
Gas	Th. therms 2,035	100	Th. therms 3,236	217
Electricity	Th. kWh 340,834	1,625	Th. kWh 485,128	2,750
Total cost of materials and fuel		196,146		203,421
Goods purchased for merchanting		..		24,839
Canteen purchases		..		202
Total cost of purchases		..		228,460

(a) Not recorded separately.

(b) The total quantity of electricity generated in firms' own establishments in this industry was 2,685 thousand kWh in 1963. Owing to the risk of disclosure of information relating to individual firms the quantity for 1954 cannot be given.

TABLE 11 Transport costs and employment of larger firms, 1963

Firms employing 25 or more persons: United Kingdom

	Unit	1963
Average number employed mainly on transport	No.	2,012
Transport costs		
Wages and salaries	£'000	1,771
Derv fuel and motor spirit	"	600
Payments to other organisations for transport	"	6,675
Costs of operating road goods vehicles		
Insurance	"	88
Vehicle licences	"	116
Depreciation	"	503
Payments to other organisations for repairs and maintenance	"	356
Total	"	10,109

TABLE 12 Payments for certain services, etc. by larger firms, 1963 (a)

Firms employing 25 or more persons: United Kingdom

	Amounts payable
	£'000
Repairs and maintenance to	
Buildings	417
Road goods vehicles	356
Plant, machinery, and other capital equipment	627
Insurance, licensing and depreciation of road goods vehicles (b)	707
Rates, excluding water rates	1,077
Hire of plant and machinery	24
Postage, telephone, telegrams and cables	429
Total	3,637

(a) No deduction is made for these payments to arrive at the figures of net output given in this report.
 (b) For details see Table 11.

TABLE 13 Percentage analysis of twelve-month periods covered by returns from larger firms, 1963

Firms employing 25 or more persons: United Kingdom

Year ended	Percentage of total number employed	Year ended	Percentage of total number employed
1963	Per cent.	1963 (contd.)	Per cent.
April (a)	1.0	November	0.0
May	0.2	December	16.6
June	2.3		
July	2.8	1964	
August	32.9	January	14.3
September	1.0	February	13.8
October	0.0	March	15.2
		Total	100

(a) Including returns made for twelve-month periods ended 1st to 5th April, 1964.

TABLE 14 Sales of all parts of machinery and plant by larger firms, including sales by establishments classified to other industries, 1958 and 1963

This table is not applicable to this industry.

Capital Expenditure (continued)

(ii) Land and existing buildings.

The items shown are the capital cost of freeholds purchased and the capital cost or premium payable for leaseholds acquired (excluding the value of any assets acquired in taking over an existing business), and the amounts receivable for any freeholds or leaseholds disposed of. The value is that charged to capital account during the year of return.

(iii) Plant, machinery and vehicles.

The items shown are the value of plant and machinery and of vehicles acquired, both new and second-hand, and the amount received for items disposed of during the year. The value of plant and machinery acquired includes plant, etc. which firms produced for their own use in connection with the business covered by the return. The value of plant, etc. acquired is the expenditure charged to capital account during the year of return less any discounts received, but including the cost of transport and installation. No deduction is made for depreciation, amortisation or obsolescence. The proceeds of items disposed of during the year exclude amounts written off for items scrapped.

Capital expenditure during the year in respect of manufacturing establishments where production had not started before the end of the year is excluded in this report for both 1958 and 1963.

Characteristic Products

The characteristic products of a sub-division are those in terms of which the sub-division is defined. They are products commonly associated in production and are usually similar in nature or manner of production. In most cases the characteristic products of each sub-division are indicated in Table 5 of the industry reports. For those industries for which an analysis by sub-divisions has been made, Table 2 shows the total sales of such characteristic products for each sub-division. The totals include, besides the products which define the sub-division, other items of output assumed to be closely related to them, e.g. waste products and work done.

Enterprise

The term enterprise is used in this report to mean one or more firms under common ownership or control. An enterprise normally consists either of a single firm, or of a parent company together with its subsidiary companies.

Entries

The number of entries shown in Tables 5, 6 and 8 against a particular output or production heading is the number of returns on which figures were recorded for that item.

Establishment

The census was based on the establishment, comprising in most cases the whole of the premises under the same ownership or management at a particular address (e.g. a factory or mine); but firms were asked to exclude from all sections of their returns particulars relating to any department not engaged in production for which they kept a separate set of accounts. Where separate accounts were not kept, they were asked to include merchandising or factoring, canteens operated by them and other

ancillary activities such as bottling, packing and the manufacture of containers for packing their own products, whether or not these activities are carried on at the same address as the works. Building and engineering maintenance departments and selling and transport departments were treated similarly.

Gross Output

The gross output of an industry is the aggregate value of goods made and other work done during the year by the establishments classified to the industry. It is derived by subtracting from the value of sales and work done, the value of stocks of goods on hand for sale and work in progress at the beginning of the year and adding the value at the end of the year.

Larger Firms

These are firms in which twenty-five or more persons were employed on the average during the year.

Net Output

The net output of an industry represents the value added to materials by the process of production. It includes the gross margin on any merchanted or factored goods sold; it constitutes the fund from which wages, salaries, insurance, pensions, hire of plant and machinery, payments for repairs and maintenance, costs of operating road vehicles, rents, rates and taxes, advertising and other selling expenses and all other similar charges have to be met, as well as depreciation and profits. There is no appreciable duplication in net output. Net output has been obtained by deducting from the gross output the cost of purchases adjusted for stock changes, payments for work given out to other firms, and payments for transport.

Normally any customs or excise duty on materials purchased is included in the cost of materials. Similarly, finished goods sold have been valued as they were sold, duty paid or duty free. The amounts of duty, subsidies, allowances and levies receivable or payable, where of substantial importance in the industry, were required to be stated separately, and these items were taken into account when calculating net output.

Net output per person employed

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) on all activities covered by the returns, including operatives, administrative, technical and clerical employees and working proprietors, but excluding outworkers.

Principal Products

The principal products of an industry are those in terms of which the industry is defined. They are products commonly associated in production, and are usually similar in nature or manner of production.

Production

This means the total quantity of a product made during the year, whether sold in the year, added to stock, transferred to another department of the same firm, or used in the manufacture of other products within the business covered by the return. It includes goods produced from materials supplied by other firms.

Purchases

Purchases include the cost of materials and components bought for use in production; of fuel and electricity for all purposes; of packing materials, including the full cost of returnable cases and containers when first purchased; of workshop materials, office materials and materials for repairs to firms' own buildings, plant and vehicles when carried out by their own workpeople included in the return; of consumable tools; and of parts for machinery purchased during the year as replacements. Water charges are also included. In general purchases of goods for merchandising or factoring and canteen supplies are included. Materials supplied by customers for processing are excluded.

The values shown include any duty paid (less rebate, etc.) but exclude trade discounts allowed. The cost of transport is included only if included in the cost of materials as invoiced; amounts paid to transport organisations, including firms' own separate transport organisations, for delivery of materials and fuel are, therefore, excluded. Materials purchased overseas are included at their c.i.f. cost plus any duty payable if the cost of transport from the docks was not included in the invoiced price, but at their full delivered cost if invoiced 'carriage paid home'. Materials and fuel transferred from another department of the firm not covered by the same return are included at the estimated selling value recorded by the other department.

Sales

Sales are in respect of goods made by the business covered by the return, goods made for it by outworkers or by other firms from materials given out to them (sometimes described as goods made on commission) and waste products. Any machinery or other capital items produced for use in the business covered by the return are included, the value being that adopted in the firm's capital asset account. Goods sold without being subjected to any manufacturing process (merchanted or factored) and canteen takings are included as in 1958.

The value shown for sales is the net selling value, defined as the amount charged to customers whether on an ex-works or delivered basis, net of any trade discounts, agents' commissions, allowances for returnable cases, purchase tax, etc.; the net amount charged for packing materials is included. Goods charged on a delivered basis to customers overseas are included at the f.o.b. value. For work done on commission or for the trade the value shown is the net amount charged.

Where goods produced in one department were transferred to another department of the same firm not covered by the return, these transfers were treated as sales by the producing department and valued as far as possible as if they had been sold to an independent purchaser. Goods transferred to wholesale or retail selling organisations for which separate accounts were kept were valued on the same basis. Estimations of a similar kind were also sometimes necessary in valuing transfers between different firms belonging to the same enterprise. To the extent that the sales of finished products of one establishment may constitute the materials purchased by another, total figures of the value of sales (and of materials and fuel purchased) include an element of duplication.

Services rendered

This represents the amounts charged for hiring out plant, machinery and other goods, providing transport, or for any technical or other

services rendered to other organisations. It includes amounts credited for similar services rendered to other departments of the same firm not covered by the return.

Small Firms

These are firms in which fewer than twenty-five persons were employed on the average during the year.

Stocks and Work in Progress

Values are given of stocks of goods on hand for sale, and of materials and fuel, at the beginning and end of the year of return, including any stocks of goods held for merchandising or factoring. The values include duty in the case of dutiable goods held out of bond. The value of work in progress at the two dates is also usually shown. This excludes any progress payments made to sub-contractors, and no deduction is made on account of progress payments received.

Transport Payments

These represent the total amount paid or credited during the year for both outwards transport of finished goods sold and inwards transport of materials and fuel purchased. They include payments to other firms, and to any separate transport organisation of the same firm, not covered by the return, but exclude the value of transport services provided by the business covered by the return. The items included are payments for hired cartage and for inwards and outwards carriage by all forms of inland transport, i.e. railways, road haulage, canals, coast-wise shipping, air, etc. Payments made for sea freight on goods sold to customers overseas and on materials and fuel purchased from overseas suppliers are excluded.

Wages and Salaries

These are the amounts paid during the year to operatives and to administrative, technical and clerical employees. Payments to working proprietors, whether called salaries or not, are excluded; in Northern Ireland this exclusion extends also to payments to directors of limited companies. The values shown include all overtime payments, bonuses and commissions, whether paid regularly or not, and no deduction is made for income tax, insurances, contributory pensions, etc. The value of any payments in kind, travelling expenses, lodging allowances, etc. and employers' contributions to National Insurance and pension schemes is excluded.

Work given out

The figures shown represent the total amount paid for work done by other firms on materials supplied to them, and also by firms' own establishments for which separate returns were made. They do not include payments to individual outworkers or payments for business and other services.

Symbols used

The following symbols are used throughout the report:

- .. Not available
- Nil or negligible (less than half the final digit shown)
- * Figures cannot be shown owing to the risk of disclosing information about individual enterprises.

Rounding of Figures

The figures in the tables have, where necessary, been rounded to the nearest final digit. There may, therefore, be apparent slight discrepancies between the sums of the constituent items and the totals shown.

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