

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 at milling establishments); milling, flaking or rolling barley, oats, maize, rye, rice, etc, the production of wheat and other grain offal, splitting or grinding peas, beans, lentils, soya beans, sago, 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 (Revised 1968), which has been used for the first time as a basis of classification in the 1968 Census.

The industry corresponds to the Grain Milling Industry (Part 7) in the Reports on the last detailed Census of Production for 1963, except that the non-standard procedure affecting the classification of returns with production of animal and poultry feeding-stuffs at milling establishments has been discontinued.

Throughout this Report, the figures given for 1963 have been reclassified as far as possible according to the Standard Industrial Classification (Revised 1968) so that data for 1963 and 1968 are on the same industrial basis.

METHOD OF CLASSIFICATION

The following adaptation to the standard classification procedure was made to bring within scope of this industry establishments with sales of self-raising flour (made from flour of the establishments own milling), which otherwise would have been classified to the Starch and Miscellaneous Foods Industry (Part 18). 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 85 per cent. or more of the total output, in which case, the return was classified to the Starch and Miscellaneous Foods Industry. Details of the sales of self-raising flour are shown in the report on the Starch and Miscellaneous 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 (i) to (iv).

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TABLE 1 Industry summary, 1963 and 1968
United Kingdom (a) (b)

	Unit	All establishments	
		1963	1968
Number of enterprises	No.	405	248
Number of establishments	"	529	352
Gross output	£'000	310,521	363,267
Net output	"	75,572	95,454
Net output per head	£	2,567	4,037
Sales and work done	£'000	282,726	322,207
	"	27,761	40,171
Purchases	"	205,334	226,682
	"	24,624	33,285
Payments to other organisations	"	63	17
	"	7,180	7,230
	"		1,460
Stocks and work in progress	"	+ 2,286	+ 1,750
	"	35,260	35,574
Goods on hand for sale	"	+ 9	+ 850
	"	8,360	9,447
Work in progress	"	+ 25	+ 40
	"	425	288
Materials, stores and fuel	"	+ 2,252	+ 860
	"	26,475	25,839
Number employed on average during the year	Th.	29.4	23.6
	"	20.7	16.9
	"	8.3	6.4
Wages and salaries	£'000	15,592	17,692
	"	8,006	8,424
Capital expenditure (e)	"	8,373	8,258
	"	2,541	1,573
Land and existing buildings (f)	"	- 214	125
Plant and machinery (f)	"	5,306	5,290
Vehicles (f)	"	740	1,270

(a) For 1968, estimates for establishments not making satisfactory returns and for small establishments, from which only employment data were collected, accounted for 9 per cent. of the total figures in which they were incorporated: of this, unsatisfactory returns accounted for 2 per cent. For 1963 the comparable figures were 10 per cent. and less than 1 per cent. respectively.

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

	1963	1968
Number of establishments	363	208
Average number employed:		
Working proprietors	406	203
Other persons employed	2,733	1,703

Footnotes continued from page 7/3.

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

(d) Administrative, technical and clerical employees.

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

(f) Acquisitions less disposals.

Footnotes continued on page 7/2.

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

(i) Output and employment

All establishments: United Kingdom

Number employed on average during the year by the establishment (a)	Estab-lish-ments	Enter-prises (b)	Total number employed on average during the year (a)	Gross output	Net output	Net output per head
1-5	76	73	219	..	..	..
6-10	34	34	252	..	..	..
11-24	68	62	1,168	..	..	..
25-49	38	27	1,443	25,238	4,842	3,355
50-99	49	25	3,614	68,396	14,430	3,993
100-199	24	14	3,352	49,890	10,731	3,201
200-299	18	6	4,499	80,322	18,499	4,112
300-999	9	3	4,349	65,791	18,549	4,265
1,000 and over	3	3	4,244	40,621	19,895	4,688
Unsatisfactory returns	33	31	505	..	..	..
Total	352	248	23,645	363,267(c)	95,454(c)	4,037(c)

(ii) Employees, wages and salaries

All establishments: United Kingdom

Number employed on average during the year by the establishment (a)	Employees		Wages and salaries		Wages and salaries per head	
	Oper-atives	Others (d)	Oper-atives	Others (d)	Oper-atives	Others (d)
	Number	Number	£'000	£'000	£	£
1-5	..	..	..	..	..	..
6-10	..	..	..	..	..	..
11-24	..	..	..	..	..	..
25-49	1,044	383	1,083	544	1,037	1,420
50-99	2,677	922	2,804	1,176	1,047	1,275
100-199	2,525	823	2,473	954	979	1,160
200-299	3,253	1,247	3,403	1,535	1,046	1,231
300-999	2,825	1,522	2,976	2,014	1,053	1,323
1,000 and over	3,242	995	3,509	1,484	1,082	1,491
Unsatisfactory returns	..	..	..	..	..	..
Total	16,947(c)	6,449(c)	17,692(c)	8,424(c)	1,044(c)	1,306(c)

(a) Including working proprietors.

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

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

(d) Administrative, technical and clerical employees.

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

All establishments: United Kingdom

Ages	Males	Females	All employees
	Per cent.	Per cent.	Per cent.
Under 18	1	1	2
18 and over	78	20	98
All ages	79	21	100

Source: Department of Employment

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

Footnotes to Table 4.

- (a) Some establishments employing fewer than 25 persons were included in returns for larger establishments. These amounted to 8 establishments in 1938 and 18 in 1963.
- (b) The method of classifying returns to sub-divisions of the industry is explained in the notes: the characteristic products of each sub-division are identified in Table 5.
- (c) The sum of the figures for the sub-divisions exceeds the total for the industry to the extent that enterprises made returns for more than one sub-division.
- (d) Including services rendered to other organisations (amounts charged for hiring out plant, machinery or other goods, for providing transport, or for technical or other services rendered).
- (e) Direct sales of goods (excluding canteen takings) made to, and work done for, the general public by larger establishments are included. These amounted to £1,067,000 in 1968. Similar information is not available for 1963.
- (f) Characteristic products relate only to sub-divisions of the industry.
- (g) For sub-divisions of the industry, this is the ratio of sales of characteristic products to total sales of goods produced and work done. For the industry as a whole, this is the ratio of total sales of principal products by the industry to total sales of goods produced and work done.
- (h) Administrative, technical and clerical employees.
- (i) Excluding expenditure for establishments not yet in production.
- (j) Acquisitions less disposals.

TABLE 4 Analysis of larger establishments, 1963 and 1968
Establishments employing 25 or more persons: Analysis of returns received, United Kingdom (a)

	Unit	Sub-divisions of the industry (b)				Sub-divisions of the industry (b)			
		Cereal products other than breakfast foods packeted for retail sale				Cereal breakfast foods packeted for retail sale		Total	
		Wheat		Oat, barley, maize, rice and other cereal products		22			
		10	11	12	13	1963	1968	1963	1968
Number of enterprises (c)	No.	50	44	24	11	5	7	78	61
Number of establishments	"	139	125	38	15	6	9	183	149
Gross output	£'000	214,404	263,935	24,761	16,976	39,431	50,862	278,596	331,772
Net output	"	44,503	59,951	4,083	2,635	19,217	24,593	67,803	87,178
Net output per head	£	2,332	3,950	1,713	2,852	3,881	4,475	2,567	4,037
Sales and work done	£'000	197,343	230,901	18,146	14,656	38,170	48,714	253,659	294,272
Sales of characteristic products	"	16,857	32,800	6,897	2,326	1,152	1,562	24,907	36,688
Index of specialisation (g)	Per cent.	76	76	76	84	29,535	40,825	(f)	(f)
Purchases	£'000	151,350	172,601	14,742	12,182	77	84	80	80
Payments to other organisations	"	15,478	26,416	5,555	2,137	18,133	22,246	184,224	207,029
Stocks and work in progress	"	55	1	2	-	1,060	1,846	22,092	30,399
Goods on hand for sale	"	4,655	4,898	300	172	-	14	56	16
Work in progress	"	578	578	300	23	1,487	1,533	6,442	6,603
Materials, stores and fuel	"	281	167	276	1	884	2,076	7,500	8,628
Number employed on average during the year	No.	5,312	5,713	1,304	839	+ 3	+ 609	+ 8	+ 777
Wages and salaries	£'000	78	67	6	7	+ 106	- 24	+ 22	+ 36
Capital expenditure (i)	"	145	205	11	13	225	44	381	263
New building work	£'000	+ 1,636	+ 509	- 81	+ 174	+ 465	+ 102	+ 2,021	+ 786
Land and existing buildings	"	18,413	17,718	2,087	1,325	3,254	4,556	23,753	23,599
Plant and machinery	"	19,080	15,176	2,384	924	4,952	5,495	26,416	21,595
Vehicles	"	13,570	10,948	1,751	670	3,513	4,014	18,834	15,632
acquisitions	"	5,484	4,200	617	247	1,439	1,471	7,540	5,918
disposals	"	10,006	11,482	1,189	639	2,996	4,199	14,191	16,320
of operatives	"	5,105	5,075	595	393	1,586	2,262	7,286	7,730
of other employees (h)	"	737	1,049	679	954	853	1,046	753	1,044
of operatives	"	931	1,208	965	1,590	1,102	1,537	966	1,306
of other employees (h)	"	1,122	952		24				
acquisitions	"	60	143		7		461	2,280	1,436
disposals	"	349	37	223 (j)	(j)		16 (j)	171	167
acquisitions	"	3,441	3,325		99	2,439 (j)		363	53
disposals	"	87	43		7		1,476	4,934	4,900
acquisitions	"	679	1,231	98	57		20	174	69
disposals	"	182	326	31	17	262	356	1,039	1,644
						163	140	376	484

For notes to this table - see page 7/5.

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

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

Industry sub-division (a)	1963		1968				
	Quantity	Value	Quantity	Value	Enter-prises	Entries	
	Th. tons	£'000	Th. tons	£'000	Number	Number	
10	Wheat products						
	Meal and flour (excluding self-raising flour and semolina)						
	White flour for breadmaking	2,478	96,814	2,288	110,439	49	102
	Other white flour	733	26,300	824	33,124	44	90
	High extraction flours (including wheatmeal)	234	10,484	..	8,484	41	83
	Semolina	14.8	825	17.0	1,042	15	21
	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)	1,224	25,843	1,231	28,382	63	134
	Total wheat products (other than cereal breakfast foods in packets for retail sale)	4,684	160,267	4,359	172,987	..	..
		..	196	..	8,484	..	..
21	Oat products						
	Meal and groats	7.9	365	7.6	341	8	8
	Rolled oats, oat flakes and oat flour	16.9	752	12.1	557	13	19
	Crushed and ground oats and other oat products and by-products (other than cereal breakfast foods in packets for retail sale)	46.0	910	38.9	748	79	100
		..	..	..	99	..	..
	Total oat products (other than cereal breakfast foods in packets for retail sale)	70.8	2,028	58.6	1,646	..	..
		..	..	..	99	..	..
21	Barley products						
	Meal	120	2,998	73.6	2,027	93	137
	Barley flour, and pearled, blocked, flaked, puffed and pot barley	22.6	756	17.7	554	18	27
		..	..	..	418	..	..
	Other barley products and by-products (other than cereal breakfast foods in packets for retail sale)	66.3	1,739	115	3,055	50	74
		..	..	..	848	..	..
	Total barley products (other than cereal breakfast foods in packets for retail sale)	208	5,493	206	5,636	..	..
		..	..	..	1,266	..	..
21	Maize products						
	Meal and flour and other maize products and by-products (other than cereal breakfast foods in packets for retail sale and flaked maize)	247	6,763	196	5,574	66	101

TABLE 5 (continued)

Industry sub-division (a)	1963		1968				
	Quantity	Value	Quantity	Value	Enter-prises	Entries	
	Th. tons	£'000	Th. tons	£'000	Number	Number	
21	Maize products (continued)						
	Flaked maize						
	For human consumption	8.5	334	..	876	*	*
	Not for human consumption	268	7,556	209	6,259	29	53
	Total maize products (other than cereal breakfast foods in packets for retail sale)	523	14,652	405	11,833	..	..
		..	..	876	..	..	..
21	Rice whole (husked or cleaned) and rice products (other than rice puddings canned and cereal breakfast foods in packets for retail sale)						
		70.5	4,363	60.3	5,376	5	6
22	Cereal breakfast foods in packets for retail sale						
	Wheat	53.2	11,228	72.1	16,031	8	8
	Maize	57.7	12,665	68.0	14,921	*	*
	Other (including mixed)	51.6	8,214	65.8	12,263	10	11
	Total cereal breakfast foods in packets for retail sale	163	32,107	206	43,215	..	..
21	Soya meal, flour and by-products						
		19.6	1,495	19.0	1,812	*	*
21	Rye meal, flour and by-products, pea and bean meal and flour, and other meal, flour and by-products (excluding compound meals)						
		4.6	260	2.2	116	6	7
21	Split lentils and split peas						
		12.8	1,010	11.8	1,343	*	*
	Other products	..	310	..	121	9	9
	Waste products	..	5	..	93	12	12
	Work done						
21	Milling done by grist millers and others on commission						
			20		12	7	7
	Other work done		198		15	10	11
	Total		222,405		254,930	..	..
	Sales in other industries (see Table 6)		19,373		18,131	..	..
	Principal products of this industry sold by establishments in the industry		203,032		236,799	61	120(b)

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

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

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

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

	1963		1968			
	Quantity	Value	Quantity	Value	Entries	Principal industries in which produced (a)
	Th. tons	£'000	Th. tons	£'000	Number	
Wheat products						
Meal and flour (excluding self-raising flour) and semolina						
White flour for breadmaking	} 201	} 7,917	84.5	4,142	9	8,15
Other white flour			23.6	852	8	8,15
High extraction flours (including wheatmeal) and semolina			..	152	6	15
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)	56.5	1,255	26.5	646	34	15
Total wheat products (other than cereal breakfast foods in packets for retail sale)	257	9,171	135	5,640	..	
	..	67	..	152		
Oat products (other than cereal breakfast foods in packets for retail sale)	18.0	566	8.8	238	..	15
			..	99		
Barley products						
Meal	71.2	1,784	43.4	1,191	103	15
Other barley products and by-products	22.9	618	..	2,340	62	15
Total barley products (other than cereal breakfast foods in packets for retail sale)	94.1	2,402	43.4	1,191	..	
			..	2,340		
Maize products						
Meal and flour and other maize products and by-products (other than cereal breakfast foods in packets for retail sale)	91.6	2,511	72.0	2,198	68	15,18
Flaked maize						
For human consumption	} 103	} 2,961	..	496	*	15
Not for human consumption			112	3,356	30	15
Total maize products (other than cereal breakfast foods in packets for retail sale)	195	5,472	183	5,553	..	
			..	496		
Cereal breakfast foods in packets for retail sale	3.5	599	} 13.5	} 2,422	..	9,11,15,18
Rice whole (husked or cleaned) and rice products (other than rice puddings canned and cereal breakfast foods in packets for retail sale)	2.3	185				
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 (excluding compound meals), split lentils and split peas; milling done by grist millers and others on commission	..	911		-	-	
Total		19,373		18,131		

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

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

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

	1963		1968	
	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)	975	30,892	867	30,885
Other animal and poultry feeding stuffs, including dog and cat foods	159	6,625	..	10,703
	Th.cwt.		Th.cwt.	
Self-raising flour	3,067	7,629	3,698	10,724
Other products	..	4,927	..	4,487
Services rendered to other organisations (a)		555		674
Total value of goods sold without having been subjected to any manufacturing process (merchanted or factored)		24,765		36,516
Canteen takings		142		172
Total		75,534		94,160

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

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

This table is not applicable to this industry.

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

This table is not applicable to this industry.

TABLE 10 Purchases by larger establishments in the industry, 1963 and 1968
Establishments employing 25 or more persons: Analysis of returns received, United Kingdom

	1963		1968	
	Quantity	Cost	Quantity	Cost
Materials for use in production		£'000		£'000
Wheat				
Home grown	..	31,171	..	40,195
Imported	..	89,571	..	99,073
Oats				
Home grown	..	2,085	..	1,936
Imported	..	607	..	5
Barley				
Home grown	..	5,212	..	5,868
Imported	..	634	..	190
Maize	..	14,608	..	12,083
Rice	..	4,321	..	6,172
Soya beans	..	602	..	1,068
Peas, beans (excluding soya beans) and lentils	..	1,227	..	1,198
Wheat flour purchased for blending with millers' own products			Th. tons	
Home produced	..	1,591	63.1	2,331
Imported	..	452	3.2	149
Wheat offals purchased for further manufacturing or for mixing with millers' own products				
Home produced	..	496	..	1,458
Imported	..	217	..	212
Oil seed cake and meal				
Home produced	..	502	..	891
Imported	..	3,824	..	2,726
Groats and oatmeal (including pinhead oatmeal) used for further processing or manufacture	..	191	..	113
Molasses	..	509	..	392
Milk products (including whey and buttermilk powder)	..	111	..	207
Raw meat purchased for incorporation in canned pet foods	..	(a)	Th.cwt. 48.1	303
Meat meal, meat and bone meal, bone meal and sterilised bone flour	..	663	..	1,122
Fish meal and fish waste	..	1,621	..	2,200

TABLE 10 (continued)

	1963		1968	
	Quantity	Cost	Quantity	Cost
Materials for use in production (continued)		£'000	Th.cwt.	£'000
Sugar	..	1,180	496	1,674
Mineral additives (eg calcium, phosphates)			..	1,120
Pharmaceutical additives (eg vitamins, antibiotics) whether or not compounded with mineral additives (eg calcium, phosphates)	..	2,826	..	1,001
Lubricating oils and greases	Th.gal. 77.3	24 5	Th.gal. 57.8	24
Replacement parts for firms' own machinery, plant and vehicles, and accessories and consumable tools bought as replacement	..		Th.cwt. 0.3	2
Tyres and other spare parts for firms' own road goods vehicles	..	1,287	..	286
Other	..		..	1,209
All other materials for use in production	..	5,858	..	4,261
Packaging materials				
Paper and board				
Boxes, cartons, drums and canisters (with or without metal ends) of paper and cardboard	..	3,696	..	3,057
Fibreboard packing cases	..		..	1,494
Bags and multiwall paper sacks	..	1,123(b)	..	2,241
Wrapping and packing paper (including paper coated with plastics and any laminates incorporating paper but not metal)	..		..	1,013
Paper and board for converting into packaging materials	..	936	..	1,765
Other packaging materials of paper and paperboard (including moulded pulp units and labels)	..		..	928
Transparent regenerated cellulose film				
In sheets or rolls	..	129	..	113
Bags	..		..	32
Plastics film (up to 0.01 inches thick)	..	(a)	..	32
Jute and hessian piece goods, sacks and bags	..	2,588	..	1,229
All other packaging materials	..	359	..	764
Fuel and electricity (c)	Th. tons		Th. tons	
Coal	78.1	464	..	281
Coke (including screenings) and manufactured fuel	2.1	18	0.7	8

Continued on next page

TABLE 10 (continued)

	1963		1968	
	Quantity	Cost	Quantity	Cost
Fuel and electricity (c) (continued)	Th.gal.	£'000	Th.gal.	£'000
Derv fuel and motor spirit for use in road vehicles	2,595	507	2,695	683
Other liquid fuels (including creosote/pitch mixtures, etc and liquefied petroleum gases)	6,333	261	8,258	388
Gas	Th.therms	199	280	24
			..	214
	Th.kWh		Th.kWh	
Electricity	449,660	2,550	484,169	3,237
All other fuels	..	(a)	..	58
Total cost of materials and fuel		184,224		207,029
Goods purchased for merchanting		21,895		30,164
Canteen purchases		197		235
Total cost of purchases		206,316		237,428

(a) Not recorded separately for 1963.

(b) Bags were not included for 1963.

(c) The total quantity of electricity generated in establishments employing 25 or more persons in this industry was 2,585 Th.kWh in 1963. Owing to the risk of disclosure of information relating to individual firms details cannot be given for 1968.

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

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

	Unit	1963	1968
Average number mainly employed on transport	No.	1,735	1,727
Transport costs			
Wages and salaries	£'000	1,530	2,021
Derv fuel and motor spirit	"	507	683
Tyres and other spare parts for road goods vehicles	"	..	286
Payments to other organisations for transport	by road	6,442	6,603
Costs of operating road goods vehicles			
Insurance	"	75	75
Vehicle licences	"	100	194
Depreciation	"	445	485
Payments to other organisations for repairs and maintenance	"	314	365
Total	"	9,412(a)	12,045

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

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

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

	Amounts payable	
	1963	1968
Repairs and maintenance to	£'000	£'000
Buildings	374	523
Road goods vehicles	314	365
Plant, machinery and other capital equipment	557	1,073
Insurance, licensing and depreciation of road goods vehicles (b)	620	754
Rates, excluding water rates	1,005	1,439
Hire of plant and machinery	20	55
Postage, telephone, telegrams, cables and telex (c)	390	488
Total	3,280	4,697

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

(b) For details see Table 11.

(c) Excluding telex for 1963.

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

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

Year ended	Percentage of total returns received	Percentage of total number employed
1968	Per cent.	Per cent.
April (a)	1.7	0.6
May	0.8	0.4
June	4.2	2.2
July	0.0	0.0
August	9.2	4.8
September	22.5	20.7
October	0.8	0.2
November	0.8	4.9
December	13.3	19.0
1969		
January	6.7	5.1
February	5.0	25.6
March	35.0	16.4
April (b)	0.0	0.0
	100	100

(a) From 6 April.

(b) To 5 April.

