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Business Statistics Office

Business Monitor

**Report on the
Census of Production**

**Food and drink processing
machinery and packaging
and bottling machinery**

HMSO



A publication of the Government Statistical Service

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PA339.7 Business Monitor

A publication of the Government Statistical Service

Report on the Census of Production 1979

Food and drink processing machinery and packaging and bottling machinery

Presented by the Secretary of State for Industry
to Parliament in pursuance of the Statistics of Trade Act 1947
(10 & 11 Geo.6 Cha.39 sec 7)

Department of Industry
Business Statistics Office

London: Her Majesty's Stationery Office

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PA339.7 FOOD AND DRINK PROCESSING MACHINERY AND PACKAGING AND BOTTLING MACHINERY

PA339.7

The information in this report relates to establishments classified to the Food and drink processing, packaging and bottling machinery industry, minimum list heading 339.7/8 in the Standard Industrial Classification (revised 1968). The activities of the industry include:—

Manufacturing machinery for food and drink preparation, processing and sterilizing, including dairy machinery, machinery for bottling, packing, canning, packeting and labelling, and for bottle washing. Grain milling plant, milking machines, and portable domestic electrical appliances are excluded.

In interpreting the data in the tables it is essential to bear in mind the notes and definitions which commence on page (iii).

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TABLE 1

PA339.7

Output and costs, 1975-1979
All United Kingdom establishments classified to the industry (a)

	Unit	1975	1976	1977	1978	1979
Enterprises	Number	254	258	258	256	251
Establishments	"	282	285	283	282	277
Sales of goods produced	£ thousand	245,243(b)	261,225	309,501	354,762	324,696
Receipts for work done and industrial services rendered	"	(b)	25,421	30,659	27,408	22,315
Capital goods produced for establishments' own use	"	1,113	439	843	1,178	583
Non-industrial services rendered	"	2,804	3,201	4,462	9,053	6,541
Goods merchanted or factored	"	37,712	50,683	36,419	47,585	53,257
Total sales and work done (c)	"	286,872	340,969	381,885	439,986	407,392
Increase during the year, work in progress and goods on hand for sale	"	9,071	237	25,848	2,506	8,483
Gross output	"	295,943	341,206	407,733	442,492	415,874
Purchases of materials for use in production, and packaging and fuel	"	102,815	111,878	155,562	156,987	145,708
Purchases of goods for merchenting or factoring	"	33,029	43,536	28,018	38,410	41,215
Increase during the year, stocks of materials, stores and fuel	"	578	972	4,670	3,867	3,792
Cost of industrial services received	"	13,066	15,907	16,160	21,104	15,524
Net output	"	147,611	170,856	212,663	229,859	217,218
Total employment (d)	Thousands	29.8	30.2	30.7	29.9	25.0
Net output per head	£	4,947	5,656	6,924	7,686	8,676
Payments for non-industrial services						
Hire of vehicles, plant and machinery	£ thousand	1,551(e)	649	912	1,446	1,334
Rents of industrial and commercial buildings	"	(e)	897	1,078	1,300	1,412
Commercial insurance premiums	"	1,246	1,362	1,581	1,912	2,186
Bank charges	"	244	354	423	509	404
Other non-industrial services (f)	"	11,160	15,170	19,092	20,874	26,244
Licensing of motor vehicles	"	125	162	169	180	213
Rates, excluding water rates	"	2,444	2,774	2,939	2,959	2,927
Gross value added at factor cost	"	130,842	149,487	186,468	200,679	182,500
Gross value added at factor cost per head	£	4,385	4,948	6,071	6,711	7,289

(a) Including estimates for establishments not making satisfactory returns, non-response and establishments not selected for the Census. Satisfactory returns accounted for 86 per cent of employment within the industry. Figures for 1979 are affected by significant reclassification of establishments.

(b) Receipts for work done and industrial services rendered included in sales of goods produced.

(c) Details of manufacturers' quarterly sales of principal products are published regularly in Business Monitor PQ339.7.

(d) Average number employed during the year, including full and part-time employees (see table 7) and working proprietors.

(e) Rents of industrial and commercial buildings (not recorded separately) included in hire of vehicles, plant and machinery.

(f) For 1975-1978 transport of goods by road (within the United Kingdom) was not recorded separately. For 1979 the amount payable was £2,736 thousand.

TABLE 2

PA339.7

Capital expenditure, 1975-1979
All United Kingdom establishments classified to the industry (a)(b)

	£ thousand				
	1975	1976	1977	1978	1979
Land and buildings					
New building work	2,725	2,059	4,504	7,096	1,295
Land and existing buildings					
Acquisitions	437	124	510	1,155	619
Disposals	61	46	167	172	154
Vehicles					
Acquisitions	1,233	1,964	2,556	3,258	3,366
Disposals	334	512	596	1,070	1,143
Plant and machinery					
Acquisitions	5,865	6,739	10,485	9,447	8,840
Disposals	539	248	603	570	513
Total net capital expenditure	9,327	10,081	16,689	19,145	12,310

(a) Including estimates for establishments not making satisfactory returns, non-response and establishments not selected for the Census. Figures for 1979 are affected by significant reclassification of establishments.

(b) Capital expenditure in respect of manufacturing establishments where production had not commenced before the end of the year, is included.

TABLE 3

Stocks and work in progress, 1975-1979
All United Kingdom establishments classified to the industry (a)

	£ thousand				
	1975	1976	1977	1978	1979
			Increase		Value at end of year
Materials, stores and fuel	578	972	4,670	3,867	43,373
Work in progress	5,491	-1,679	24,978	1,170	82,466
Goods on hand for sale	3,580	1,916	870	1,336	24,352
Total	9,649	1,209	30,518	6,374	150,191

(a) Including estimates for establishments not making satisfactory returns, non-response and establishments not selected for the Census. Figures for 1979 are affected by significant reclassification of establishments.

TABLE 4

PA339.7

Analysis of establishments by size, 1979
All United Kingdom establishments classified to the industry (a)

Size group (b)	Estab-lish-ments	Enter-prises (c)	Employment			Wages and salaries (f)			
			Total (d)	Opera-tives	Others (e)	Operatives		Others (e)	
						Total	per head	Total	per head
Number	Number	Number	Number	Number					
1-10	104	103	469)						
11-19	37	36	558)						
20-49	42	42	1,365)	3,374	1,869	14,809	4,389	9,845	5,268
50-99	43	43	3,030)						
100-199	25	25	3,577	2,198	1,371	9,700	4,413	7,340	5,354
200-299	11	10	2,581	1,593	988	6,479	4,067	4,829	4,888
300-399	3	3	1,030	645	385	3,002	4,654	1,944	5,049
400-499	4	4	1,779	1,069	710	3,942	3,688	3,067	4,320
500-999	3	3	2,140	1,109	1,031	4,595	4,143	5,183	5,027
1,000 and over	5	4	8,509	4,285	4,224	19,039	4,443	21,015	4,975
Total	277	251	25,038	14,273	10,578	61,566	4,313	53,223	5,031

(a) Including estimates for establishments not making satisfactory returns, non-response and establishments not selected for the Census. Some figures are affected by significant reclassification of establishments.

(b) Average number employed during the year, including full and part-time employees (see table 7) and working proprietors.

(c) The count of enterprises shown in each row represents the number of enterprises, irrespective of size, owning the establishments shown in the previous column, i.e. the number of enterprises owning the establishments within the size group indicated by the row heading. It should be noted that because an enterprise may own establishments in more than one size group, the sum of the individual enterprise counts may exceed the total for the industry.

(d) Including working proprietors.

(e) Administrative, technical and clerical employees.

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Total sales and work done (g)	Gross output	Net output		Gross value added at factor cost		Net capital expenditure (h)	Total stocks and work in progress at end of year				
		Total	per head	Total	per head						
								Total	per head	Total	per head
£ thousand	£ thousand	£ thousand	£	£ thousand	£	£ thousand	£ thousand				
90,764	93,081	49,645	9,156	(j)	(j)	2,980	24,844				
57,011	57,300	31,304	8,751	67,276(j)	7,476(j)	2,714	16,115				
48,106	47,566	22,763	8,819	17,567	6,806	1,046	13,415				
11,301	13,909	7,588	7,367	6,644	6,450	468	6,696				
29,630	29,807	16,796	9,441	15,484	8,704	353	11,577				
46,319	44,932	17,967	8,396	15,920	7,439	537	9,454				
124,261	129,280	71,155	8,362	59,609	7,005	4,213	68,090				
407,392	415,874	217,218	8,676	182,500	7,289	12,310	150,191				

(f) The cost of employers' contributions to national insurance, pensions and welfare schemes and the running costs of canteens, is estimated for the industry at £19,957 thousand.

(g) Sales of goods produced, capital goods manufactured and buildings constructed by establishments for their own use, work done, industrial and non-industrial services rendered and merchanted goods.

(h) New building work plus acquisitions less disposals of land and existing buildings, vehicles and plant and machinery.

(j) Gross value added data relate to establishments employing 1-199.

TABLE 5

PA339.7

Regional distribution of employment, net capital expenditure, net output and gross value added at factor cost, 1979
All United Kingdom establishments classified to the industry (a)

Area	Total employment (b)		Net capital expenditure (c)		Net output (d)	Gross value added at factor cost (d)	Gross value added at factor cost returned by establishments with 80 per cent or more of their employment in the region as a proportion of total gross value added at factor cost in the region
	Thousands	per cent of United Kingdom	£ thousand	per cent of United Kingdom	£ thousand	£ thousand	percentage
Standard regions of England							
North	*	*	*	*	*	*	*
Yorkshire and Humberside	2.4	9.6	956	7.8	20,045	16,046	43.9
East Midlands	2.0	8.1	820	6.7	16,520	13,787	65.2
East Anglia	3.5	14.1	1,621	13.2	31,186	25,711	27.8
South East	7.7	30.8	4,746	38.6	70,419	60,011	71.8
South West	1.5	5.9	822	6.7	11,299	9,554	60.5
West Midlands	*	*	*	*	*	*	*
North West	3.9	15.6	1,522	12.4	32,141	27,753	87.2
England	23.4	93.5	11,410	92.7	204,772	172,751	
Wales	0.2	1.0	115	0.9	2,001	1,621	16.8
Scotland	1.3	5.4	760	6.2	10,152	7,879	56.5
Great Britain	25.0	99.9	12,284	99.8	216,925	182,251	
Northern Ireland	—	0.1	26	0.2	294	249	—
United Kingdom	25.0	100.0	12,310	100.0	217,218	182,500	

- (a) Including estimates for establishments not making satisfactory returns, non-response and establishments not selected for the Census. Some figures are affected by significant reclassification of establishments.
- (b) Average number employed during the year, including full and part-time employees (see table 7) and working proprietors.
- (c) New building work plus acquisitions less disposals of land and existing buildings, vehicles and plant and machinery.
- (d) Where a census return covered addresses in two or more regions, an estimate of the net output attributable to each address was made by assuming that net output was proportionate to employment. An estimate for each region was obtained by aggregating estimates of net output for addresses located in that region. Gross value added at factor cost is treated similarly.

TABLE 6

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Percentage analysis of twelve-month periods covered by returns received from United Kingdom establishments, 1979

Accounting year ended	Percentage of total returns received	Percentage of total number employed
	per cent	per cent
1979 April (a)	2.0	0.8
May	2.0	0.8
June	4.1	3.9
July	1.0	0.2
August	2.0	0.4
September	5.1	2.4
October	2.0	0.9
November	1.0	1.1
December	52.0	48.9
1980 January	4.1	2.9
February	—	—
March (b)	24.5	37.7

(a) From 6th April.

(b) Including returns made for twelve-month period ended 1st to 5th April 1980.

TABLE 7

Percentage analysis of employees, by full and part-time employment and sex, 1977(a)
Other machinery industries minimum list heading 339.

Sex	Full-time	Part-time	All employees
	per cent	per cent	per cent
Male	82	1	83
Female	13	4	17

Source: Department of Employment

- (a) The percentages relate to the numbers employed (excluding working proprietors) in the United Kingdom in minimum list heading 339 at mid-June, 1977, the latest date for which information is available. In the 1977 Census of Production the employment of the Food and drink processing machinery and packaging and bottling machinery industry represented 14 per cent of the employment of minimum list heading 339 as a whole.

TABLE 8

PA339.7

Operating ratios, 1978-1979
All United Kingdom establishments classified to the industry (a)

	Unit	1978	1979
Gross output per head	£	14,797	16,610
Net output per head	£	7,686	8,676
Gross value added per head	£	6,711	7,289
Gross value added as a percentage of gross output	%	45	44
Ratio of gross output to stocks (b)		3.1	2.8
Wages and salaries as a percentage of gross value added	%	62	63
Ratio of operatives to administrative, technical and clerical employees		1.4	1.3
Wages and salaries per administrative, technical and clerical employee	£	4,647	5,031
Wages and salaries per operative	£	3,891	4,313
Net capital expenditure per head	£	640	492
Net capital expenditure as a percentage of gross value added	%	10	7

(a) Including estimates for establishments not making satisfactory returns, non-response and establishments not selected for the Census.

(b) Stocks include materials, stores and fuel, work in progress and goods on hand for sale at the end of the business year.

NOTES

These notes give the main information needed for interpreting the figures in the industry Business Monitors: more detailed information about the census is given in a separate Business Monitor - PA 1001 (Introductory Notes) of the Report on the Census of Production, 1979.

GENERAL INFORMATION

Changes made for 1979
The Census for 1979 is in line with similar inquiries being conducted in other member countries of the European Community.

The census differed from the 1978 census in three respects. A question on the leasing of capital assets was removed from the form and a question on road transport costs was added. The sample of units in the 10 to 19 employment size band included for the 1978 census was not repeated.

Suppression of information relating to individual undertakings
Section 9(5) (b) of the Statistics of Trade Act 1947 states - "The following provisions shall have effect with respect to any report, summary or other communication to the public of information obtained under the foregoing provisions of this Act-

in compiling any such report, summary or communication the competent authority shall so arrange it as to prevent any particulars published therein from being identified as being particulars relating to any individual person or undertaking except with the previous consent in writing of that person or the person carrying on that undertaking, as the case may be; but this provision shall not prevent the disclosure of the total quantity or value of any articles produced, sold or delivered; so, however, that before disclosing any such total the competent authority shall have regard to any representations made to them by any person who alleges that the disclosure thereof would enable particulars relating to him or to an undertaking carried on by him to be deduced from the total disclosed."

If a figure involved disclosure the contributor concerned was sometimes asked to give permission for its publication. In the majority of cases permission was given. When it was refused and where contributors were not approached the figure has been suppressed, either by combining it with other figures, or as in the regional tables, by omitting the figure altogether.

Symbols used

The following symbols are used throughout the PA series of Business Monitors:

- .. not available
- nil or less than half the final digit shown
- * figures cannot be shown owing to the risk of disclosing information about individual enterprises.
- R revised

Rounding of figures

Figures in the tables have, where necessary, been rounded to the nearest final digit. Where figures have been so rounded, the sum of the constituent items may not always agree exactly with the total shown.

Industrial classification

The United Kingdom Standard Industrial Classification (SIC) was first issued in 1948 and was subsequently revised in 1958, 1968 and 1980. It exists to promote uniformity and comparability in the official statistics of the United Kingdom.

Prior to the 1980 revision the general principles followed were those of the International Standard Industrial Classification of all Economic Activities of the United Nations Statistical Office but the United Kingdom SIC has reflected the organisation and structure of industry and trade as it existed in the United Kingdom. For the 1980 revision an attempt was made to align the United Kingdom classification as closely as practicable with NACE, the classification in use by the Statistical Office of the European Community. The SIC is a classification by activity and is not a commodity classification. An index, based on the 1968 SIC for all commodity headings for which sales data are provided in the Quarterly Business Monitors is published in Business Monitor PO 1000.

Statistical units

The statistical unit for the purpose of the Census is the establishment which is defined in the SIC as the smallest unit which can provide the information normally required for an economic census, for example, employment, expenses, turnover, capital formation. Usually the principal activities carried on in an establishment fall within a single heading of the classification (eg steel making or sugar refining). Typically the establishment embraces all the activities carried on at a single address eg a mine or a factory, including those which are ancillary to the principal activities. Frequently distinct activities characteristic of different industries are carried on at one address, but normally these are not classified separately and the whole establishment is classified according to the main activity. If, however, the required range of data can be provided for each activity, each is taken to constitute a separate establishment. Sometimes activities which are conducted as a single business are carried on at a number of addresses. Where this is so, businesses are asked to provide the full range of information in respect of each address, whether or not the activities are different. Their activities may, however, be integrated to such an extent that they constitute a single establishment. In the latter case the establishment is defined to cover the combined activities at these addresses (termed local units). Separate figures are obtained of employment and net capital expenditure at each unit in order to compile regional tables.

Efforts are made by the Business Statistics Office (BSO) to ensure, by negotiating with respondents, that the return from an establishment does not cover local units in more than one of the countries of the United Kingdom.

Establishments are asked to exclude from their returns particulars relating to any department not engaged in production eg merchandising, transport, warehousing, for which they keep a separate set of accounts. Transfers of goods produced to such departments are treated as sales and respondents are asked to value them as far as possible as if sold to an independent purchaser. Where separate accounts are not kept they are asked to include details of all these activities in their return.

Particulars relating to head offices mainly engaged in the administration of the production units within the scope of the census were included. Where more than one return was made the information in respect of the head office was apportioned among them.

For certain purposes in the annual censuses of production (especially the enterprise analyses of Business Monitor PA 1002) related establishments are combined. An enterprise group is defined as a business consisting of either a single establishment or two or more establishments under common ownership or control. Bringing together establishments into enterprise groups is also necessary for the purpose of ensuring that there will be no disclosure of the activities of any one enterprise group. Information about the relationship of establishments, the changing structure of groups of companies and about common ownership links is obtained from many sources, including the Stock Exchange Year Book, company reports, press reports and information supplied by individual establishments.

THE REGISTER

The register permits a questionnaire to be sent direct to the reporting establishment on which the latter can include information relating to all the manufacturing (or local) units which it comprises. The inquiries provide a major source of information for keeping the register continuously up-to-date and act as a check on its detail and structure. For the establishments on the register making returns to the quarterly inquiries, the industrial classification is derived from an analysis of their sales of commodities and is reviewed annually. Employment data are entered on the register from returns to the annual census of production. In cases where an establishment does not make a return to these inquiries the employment data are based on information provided by the Department of Employment from the annual censuses of employment. New additions to the register are obtained from various sources including the Department of Employment and HM Customs and Excise. The 1973 Finance Act allows the latter to pass lists of businesses registered for VAT to the BSO. Where necessary details are sought directly from new businesses. Units which cease to trade are removed from the live register.

Coverage

In recent censuses returns have been required from all establishments employing 20 or more. For the 1979 Census in 68 selected manufacturing industries coverage of establishments in the 20 to 49

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