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PA427

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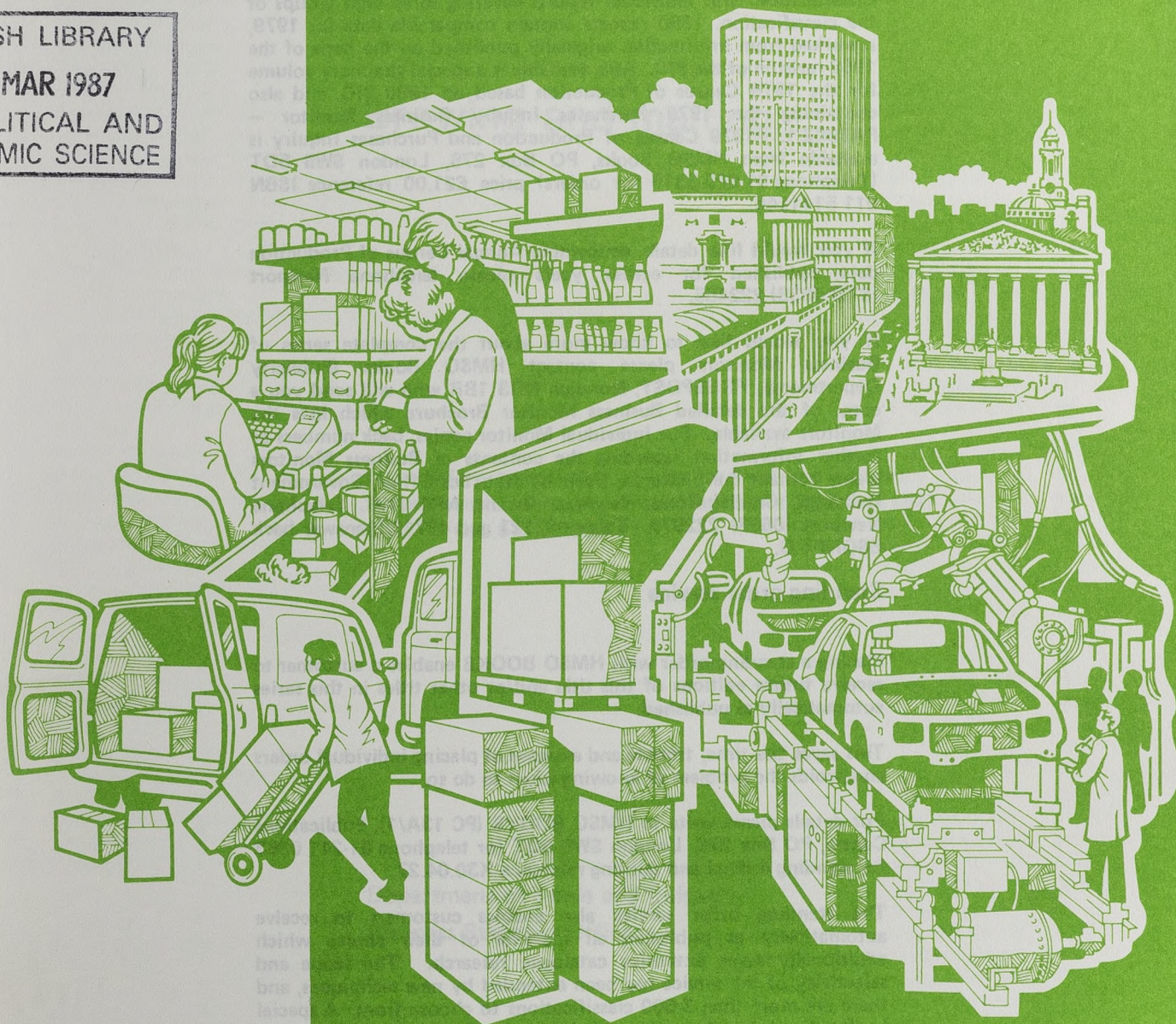
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# Business Monitor

## Report on the Census of Production

### Brewing and malting

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A publication of the Government Statistical Service

## BUSINESS MONITORS

### SPECIAL NOTE FOR PURCHASERS

The Business Statistics Office, aided by industry and commerce, provides much of the statistical data required by Government for monitoring the economy.

You may, if you wish, purchase much of the data in the form of Business Monitors which are a series of publications containing statistical information compiled from inquiry forms sent out regularly by the BSO to selected firms asking detailed questions about production, sales, employment and investment. Business Monitors are the primary or in many cases the only source of the information they contain.

The Annual Census of Production Monitors deal with the manufacturing, energy, mining and construction industries. There are 115 Monitors in this series some of which cover more than one industry and they are all listed overleaf. They are prefixed by a code P (for Production) followed by A (annual series).

The 1980 Annual Census of Production was the first to be produced on the basis of the 1980 revision of the Standard Industrial Classification with individual reports covering three digit groups of the classification. 1980 reports contain comparable data for 1979, reworked from information originally published on the basis of the 1968 revision of the SIC. Also available is a special summary volume for the 1979 Census of Production based on 1980 SIC, and also containing the 1979 Purchases Inquiry Business Monitor - PA1002.1. 1979 Census of Production and Purchases Inquiry is available from HMSO Books, PO Box 276, London SW8 5DT (Telephone 01-622 3316 for orders) price £21.00 reference ISBN 011 5141146.

If you would like details concerning Annual Census of Production data published for earlier years please telephone Newport (STD 0633) 222455.

If you would like to know more about the complete series of Business Monitors please contact HMSO Books (Publicity Department), FREEPOST, Norwich NR3 1BR who will send you a copy of the detailed Business Monitor Brochure which lists the Monitors available. For individual Monitor copies, back numbers or further information regarding the contents of Business Monitors please contact the Librarian, Business Statistics Office, Government Buildings, Cardiff Road, Newport, Gwent, NP9 1XG. Telephone Newport (0633) 222973. Telex 497121 and 497122; answer back BSONPT G.

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# PA427

# BUSINESS MONITOR

A publication of the Government Statistical Service

## Report on the Census of Production 1985

### Brewing and malting

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

Department of Trade and Industry  
Business Statistics Office

London: Her Majesty's Stationery Office

**BUSINESS MONITORS MAKING UP THE COMPLETE CENSUS REPORT**

The following is the list of Business Monitors making up the complete census report. Shown alongside each title, where appropriate, is an indication of the change in the estimated employment in that industry that has arisen, between 1983 and 1984, from the introduction of a new, more up to date, register of businesses. The change shown reflects the increase or decrease between the old and new registers at a fixed point in time and does not in itself give any indication of the growth or contraction within any industry between 1983 and 1984. Over all manufacturing industry there was an increase between the two registers of 1.3%. Changes for individual industries have arisen not only from the addition of extra, mainly small, units but also from the reclassification of some small units from one industry to another. Since estimates of census variables, based on register employment, are made for small establishments which are not required to complete census forms, the change will affect much of the data contained in the reports. This should be taken into account in interpreting the figures.

	Employment percentage variation	
PA1001	Introductory notes	
PA111	Coal extraction and manufacture of solid fuels	
PA120	Coke ovens	
PA130	Extraction of mineral oil and natural gas	
PA140	Mineral oil processing	
PA161	Production and distribution of electricity	
PA162	Public gas supply	
PA170	Water supply industry	
PA210	Extraction and preparation of metalliferous ores	38
PA221	Iron and steel industry	-1
PA222	Steel tubes	1
PA223	Drawing, cold rolling and cold forming of steel	-2
PA224	Non-ferrous metals industry	0
PA231	Extraction of stone, clay, sand and gravel	-18
PA239	Extraction of miscellaneous minerals (including salt)	-6
PA241	Structural clay products	-1
PA242	Cement, lime and plaster	0
PA243	Building products of concrete, cement or plaster	-9
PA244	Asbestos goods	0
PA245	Working of stone and other non-metallic minerals	-2
PA246	Abrasive products	-6
PA247	Glass and glassware	2
PA248	Refractory and ceramic goods	1
PA251	Basic industrial chemicals	0
PA255	Paints, varnishes and printing ink	1
PA256	Specialised chemical products mainly for industrial and agricultural purposes	1
PA257	Pharmaceutical products	1
PA258	Soap and toilet preparations	0
PA259	Specialised chemical products mainly for household and office use	0
PA260	Production of man made fibres	0
PA311	Foundries	-4
PA312	Forging, pressing and stamping	0
PA313	Bolts, nuts, etc; springs; non-precision chains; metals treatment	0
PA314	Metal doors, windows etc	2
PA316	Hand tools and finished metal goods	-1
PA320	Industrial plant and steelwork	4
PA321	Agricultural machinery and tractors	-1
PA322	Metal-working machine tools and engineers' tools	-1
PA323	Textile machinery	0
PA324	Machinery for the food, chemical and related industries; process engineering contractors	2
PA325	Mining machinery, construction and mechanical handling equipment	3
PA326	Mechanical power transmission equipment	14
PA327	Machinery for printing, paper, wood, leather, rubber, glass and related industries; laundry and dry cleaning machinery	-4
PA328	Miscellaneous machinery and mechanical equipment	0
PA329	Ordnance, small arms and ammunition	0
PA330	Manufacture of office machinery and data processing equipment	7
PA341	Insulated wires and cables	2
PA342	Basic electrical equipment	1
PA343	Electrical equipment for industrial use, and batteries and accumulators	3
PA344	Telecommunication equipment, electrical measuring equipment, electronic capital goods and passive electronic components	2
PA345	Miscellaneous electronic equipment	3
PA346	Domestic-type electric appliances	1
PA347	Electric lamps and other electric lighting equipment	13
PA351	Motor vehicles and their engines	0
PA352	Motor vehicle bodies, trailers and caravans	-3

**BUSINESS MONITORS MAKING UP THE COMPLETE CENSUS REPORT (continued)**

	Employment percentage variation	
PA353	Motor vehicle parts	-2
PA361	Shipbuilding and repairing	0
PA362	Railway and tramway vehicles	0
PA363	Cycles and motor cycles	0
PA364	Aerospace equipment manufacturing and repairing	0
PA365	Miscellaneous vehicles	2
PA371	Measuring, checking and precision instruments and apparatus	4
PA372	Medical and surgical equipment and orthopaedic appliances	-8
PA373	Optical precision instruments and photographic equipment	1
PA374	Clocks, watches and other timing devices	0
PA411	Organic oils and fats	1
PA412	Slaughtering of animals and production of meat and by-products	
PA413	Preparation of milk and milk products	-5
PA414	Processing of fruit and vegetables	0
PA415	Fish processing	-4
PA416	Grain milling	-7
PA419	Bread, biscuits and flour confectionery	14
PA420	Sugar and sugar by-products	0
PA421	Ice-cream, cocoa, chocolate and sugar confectionery	-2
PA422	Animal feeding stuffs	-5
PA423	Starch and miscellaneous foods	2
PA424	Spirit distilling and compounding	0
PA426	Wines, cider and perry	2
PA427	Brewing and malting	0
PA428	Soft drinks	-1
PA429	Tobacco industry	0
PA431	Woollen and worsted industry	-2
PA432	Cotton and silk industries	3
PA433	Throwing, texturing, etc. of continuous filament yarn	-3
PA434	Spinning and weaving of flax, hemp and ramie	-3
PA435	Jute and polypropylene yarns and fabrics	0
PA436	Hosiery and other knitted goods	3
PA437	Textile finishing	3
PA438	Carpets and other textile floorcoverings	1
PA439	Miscellaneous textiles	3
PA441	Leather (tanning and dressing) and fellmongery	-5
PA442	Leather goods	8
PA451	Footwear	2
PA453	Clothing, hats and gloves	7
PA455	Household textiles and other made-up textiles	-2
PA456	Fur goods	-27
PA461	Sawmilling, planing, etc. of wood	-17
PA462	Manufacture of semi-finished wood products and further processing and treatment of wood	-4
PA463	Builders carpentry and joinery	-5
PA464	Wooden containers	-6
PA465	Miscellaneous wooden articles	4
PA466	Articles of cork and plaiting materials, brushes and brooms	7
PA467	Wooden and upholstered furniture and shop and office fittings	-1
PA471	Pulp, paper and board	1
PA472	Conversion of paper and board	3
PA475	Printing and publishing	5
PA481	Rubber products	-1
PA483	Processing of plastics	2
PA491	Jewellery and coins	1
PA492	Musical instruments	-5
PA493	Photographic and cinematographic processing laboratories	
PA494	Toys and sports goods	-1
PA495	Miscellaneous manufacturing industries	67
PA500	Construction	
PA1002	Summary tables	

The information in this report relates to establishments classified to the Brewing and malting industry, Group 427 in the Standard Industrial Classification Revised 1980. The industry Group covers the following Activity Heading:—

- 4270 Brewing and malting**  
 1. Beer and other brewing products.  
 2. Malt and malt products.

For a full description of the 1980 classification see Standard Industrial Classification Revised 1980, obtainable from Her Majesty's Stationery Office, price £3.95.

**In interpreting the data in the tables it is essential to bear in mind the notes and definitions which commence on page 5.**

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**EXPLANATORY NOTES AND DEFINITIONS**

**INTRODUCTION**

1. These notes give basic information to help with the interpretation of tables in this Industry Report. More general information about the Census is given in a separate Business Monitor — Report on the Census of Production, Introductory Notes (PA1001).

2. Since 1980, Censuses have been conducted on the Standard Industrial Classification Revised 1980 (SIC(80)). The Standard Industrial Classification exists to promote uniformity and comparability in the official statistics of the United Kingdom. The SIC(80) is the result of an attempt to align the United Kingdom classification with the General Industrial Classification of Economic Activities within the European Communities (NACE). It is based on activity rather than commodities produced. A full description of SIC(80) is given in Standard Industrial Classification Revised 1980, obtainable from Her Majesty's Stationery Office, price £3.95.

**REPORTING UNIT**

3. As far as possible the reporting unit in respect of which information is collected is one whose activities fall within a single activity heading of the classification and which is situated at a single geographical location. Frequently, however, the information required cannot be provided on this basis. Where information covering a mixture of activities is all that is available, the unit is classified according to the main activity. Where a unit operates at a number of locations and the full range of information is not available for each location, the reporting unit is deemed to cover a number of locations. In most cases, separate information on employment and net capital expenditure is obtained for each location (local unit) in order to enable regional data to be compiled. The reporting unit, usually called the establishment, is therefore defined as the smallest unit for which the information normally required in a production census can be provided.

4. Establishments are asked to exclude from their returns particulars relating to ancillary departments not engaged in production (such as merchanting or factoring organisations, transport organisations, canteens and warehouses) for which separate accounts are kept. Transfers of goods produced to such departments are treated as sales, valued as far as possible as if sold to an independent purchaser. Where separate accounts are not kept, establishments are allowed to include details in their returns. Establishments are asked to include details relating to head offices engaged mainly in the administration of production units within the scope of the Census. Where head office activity covers more than one return, details are included in the principal return.

**THE REGISTER**

5. A register of production units throughout the United Kingdom is held on the BSO computer and provides the basis for BSO inquiries to the production sector. For each unit the register contains identification particulars and information about that unit's eligibility for inclusion in an inquiry, its relationship with other units in common ownership, its industrial classification, the nationality of its parent and location indicators for regional analyses. Regional and size analyses of manufacturing units are published in Business Monitor PA1003 — Analyses of United Kingdom Manufacturing (Local) Units by Employment Size. During 1984, for production inquiries, the BSO moved to an updated register which makes fuller use of information obtained from HM Customs and Excise VAT records.

6. The annual Census and other inquiries provide a major source of information for updating and checking the register. For establishments on the register making returns to the Quarterly Sales Inquiry, industrial classification is reviewed annually and is derived from an analysis of their commodity sales. Employment data are provided by the Quarterly Sales Inquiry and the Census of Production. Where establishments on the register do not make returns to these inquiries, employment is based mainly on information provided by the Department of Employment from Censuses of Employment. New additions to the register are obtained from various sources including HM Customs and Excise VAT records and Censuses of Employment.

**COVERAGE**

7. The Census covers United Kingdom establishments engaged in industrial production, i.e. mining and quarrying, manufacturing, construction, and gas, electricity and water supply industries (Divisions 1 to 5 of SIC(80)). Establishments in the Channel Islands and the Isle of Man are excluded.

8. Under the sampling arrangements agreed for the 1985 Census, forms were despatched to all establishments with 100 or more employed and, for most production industries, samples of 1 in 4 and 1 in 2 respectively being taken for establishments in the 20 to 49 and 50 to 99 employment size bands. For industries where there were few units in the sample size band or where response in earlier years was poor, it was necessary to increase the sample. About 16,800 forms were despatched to production establishments in the United Kingdom for the 1985 Census.

**PERIOD COVERED**

9. Establishments were asked to make returns for the calendar year 1985 but, where this was not possible, returns for business years ending between 6 April 1985 and 5 April 1986 were accepted. Returns covering fewer than twelve months were accepted for businesses which had started or ceased trading during the year.

**ESTIMATION**

10. All published Census results include estimates for non-responders, unsatisfactory returns and establishments not selected for the Census. Estimates are also made for items not covered on the shorter form sent to smaller establishments.

11. Within employment size groups in each industry, the "average per head" is calculated for each census variable by dividing the total returned value for each variable by the total returned employment. This value is multiplied by the employment thought to exist in each non-responding or unselected establishment to yield an estimated value for that establishment. Estimates for items not collected on the shorter form are made in a similar way using returned employment.

12. The accuracy of the totals produced by adding together estimates and returned data is mainly dependent on two measures. The first of these is the extent to which establishments making satisfactory returns account for the overall total for any heading. In practice a measure of this is normally taken to be the employment of establishments making satisfactory returns expressed as a percentage of the total estimated employment (this is given in footnote (a) to Table 1). Thus the accuracy of data published in an Industry Report where 95 per cent of the employment in the industry is covered by returns made, will, in general, be better than that in an Industry Report where the coverage is only 70 per cent.

13. The second measure is the extent to which individual headings in an Industry Report are related to employment. Thus an estimate of total earnings which bears a close relationship to total employment is likely to be more accurate than an estimate of capital expenditure where the relationship to employment is not so clearly marked.

**SUPPRESSION OF INFORMATION RELATING TO INDIVIDUAL UNDERTAKINGS**

14. Sub-section 9(5)(b) of the Statistics of Trade Act 1947 states that:

"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."

15. Figures which would be likely to disclose particulars relating to an individual undertaking are not published unless the contributor has given written consent for their publication.

**CHANGES MADE FOR 1985**

16. The 1985 Census was a slimline one with fewer establishments receiving inquiry forms than in 1984, due to the increased use of sampling. The additional questions in the 1984 Census relating to road transport costs, and postal and telecommunications costs were excluded for 1985.

**SYMBOLS USED**

17. 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





TABLE 4

Employment, labour costs, output, net capital expenditure and stocks and work in progress by size of total employment, 1985

All United Kingdom establishments classified to the industry (a)

Size group	Estab-lish-ments	Enter-prises (b)	Employment			Wages and salaries (c)			
			Total, including working proprietors	Opera-tives	Adminis-trative,tech-nical and clerical	Operatives		Administrative, technical and clerical	
						Total	per head	Total	per head
Number	Number	Thousand	Thousand	Thousand	£ million	£	£ million	£	
1-9	110	94	0.4						
10-19	13	9	0.2						
20-49	14	14	0.5	1.7	0.9	14.2	8,104	8.8	10,311
50-99	22	21	1.6						
100-199	31	27	4.5	3.0	1.5	24.1	7,998	15.6	10,334
200-299	8	7	1.9	1.3	0.7	12.1	9,615	7.2	10,573
300-399	9	8	3.1	2.0	1.1	20.3	10,136	12.4	11,048
400-499	9	9	4.1	2.4	1.6	21.0	8,585	16.2	9,870
500-749	7	6	4.2	2.6	1.6	31.6	12,169	17.7	11,272
750-999	7	6	6.3	4.2	2.1	39.2	9,351	21.5	10,427
1,000-Plus	7	6	8.9	6.1	2.8	66.8	10,960	34.2	12,132
<b>Total</b>	<b>237</b>	<b>171</b>	<b>35.6</b>	<b>23.3</b>	<b>12.3</b>	<b>229.2</b>	<b>9,818</b>	<b>133.6</b>	<b>10,898</b>

(a) Establishments employing fewer than 20 persons are not required to complete census returns. Because of this, data for these establishments should be regarded merely as the best estimates available and used with caution.

(b) The count of enterprises shown in each row represents the number of enterprises, irrespective of size, owning the establishments shown in each size group. Because an enterprise may own establishments in more than one size group, the sum of individual enterprise counts may exceed the total for the industry.

(c) The cost of employers' contributions to the national insurance, pensions and welfare schemes and the running costs of canteens are excluded from the table but were estimated for the industry at £69.1 million.

(d) Gross value added data relates to establishments employing 1-199.

PA427

Total sales and work done	Gross output	Net output		Gross value added at factor cost		Net capital expenditure	Total stocks and work in progress at end of year
		Total	per head	Total	per head		
345.6	346.6	102.1	38,785	(d)	(d)	17.9	37.0
598.8	598.8	142.8	31,561	210.6(d)	29,250(d)	36.0	113.2
284.6	285.5	63.7	32,794	53.8	27,697	13.2	32.6
607.3	613.1	206.8	66,318	147.8	47,388	35.2	50.2
398.5	395.3	121.2	29,676	97.5	23,868	23.7	51.6
625.3	630.2	165.2	39,612	124.2	29,776	33.9	50.5
679.8	683.9	211.6	33,834	193.8	30,983	24.9	63.5
1,192.8	1,194.7	227.2	25,504	186.0	20,883	37.5	99.5
<b>4,732.6</b>	<b>4,748.0</b>	<b>1,240.6</b>	<b>34,816</b>	<b>1,013.7</b>	<b>28,448</b>	<b>222.5</b>	<b>498.1</b>

TABLE 5

PA427

Percentage analysis of twelve-month periods covered by returns received for the 1985 Census by number of returns and total employment

Accounting year ended	Percentage of total returns received	Percentage of total employment
1985		
April 6-30	2.2	2.8
May	-	-
June	2.2	1.8
July	1.1	0.2
August	-	-
September	42.2	43.0
October	3.3	5.8
November	-	-
December	15.6	9.7
1986		
January	2.2	1.0
February	2.2	1.1
1 March - 5 April	28.9	34.7

TABLE 6

Operating ratios, 1981-1985

All United Kingdom establishments classified to the industry

	Unit	1981	1982	1983	1984	1985
Gross output per head	£	83,863	95,465	111,112	122,050	133,246
Net output per head	£	24,912	28,350	33,030	32,784	34,816
Gross value added per head	£	22,022	23,459	26,896	26,364	28,448
Gross value added as a percentage of gross output	%	26	25	24	22	21
Ratio of gross output to stocks		9.2	8.6	8.4	8.9	9.5
Wages and salaries as a percentage of gross value added	%	35	36	34	36	36
Ratio of operatives to administrative, technical and clerical employees		2.0	2.1	1.9	2.0	1.9
Wages and salaries per operative	£	7,491	8,030	8,813	9,163	9,818
Wages and salaries per administrative, technical and clerical employee	£	8,206	9,018	9,686	10,441	10,898
Net capital expenditure per head	£	3,187	3,522	3,783	4,468	6,245
Net capital expenditure as a percentage of gross value added	%	14	15	14	17	22

TABLE 7

PA427

Regional distribution of employment, net capital expenditure, net output and gross value added at factor cost, 1985  
All United Kingdom establishments classified to the industry

Area	Total employment (a)		Net capital expenditure (b)		Net output (c)		Gross value added at factor cost (c)	
	Thousand	per cent of United Kingdom	£ million	per cent of United Kingdom	£ million	per cent of United Kingdom	£ million	per cent of United Kingdom
Standard regions of England								
North	2.8	7.8	11.5	5.2	84.7	6.8	67.5	6.7
Yorkshire and Humberside	3.6	10.0	26.3	11.8	167.2	13.5	152.3	15.0
East Midlands	2.6	7.4	18.3	8.2	147.7	11.9	121.3	12.0
East Anglia	2.2	6.2	6.8	3.1	51.2	4.1	42.8	4.2
South East	7.0	19.8	52.0	23.4	221.6	17.9	172.9	17.1
South West	2.2	6.2	15.1	6.8	65.7	5.3	59.7	5.9
West Midlands	4.4	12.5	25.8	11.6	128.9	10.4	113.8	11.2
North West	6.0	16.9	25.4	11.4	203.6	16.4	160.8	15.9
England	30.9	86.8	181.3	81.5	1,070.5	86.3	891.1	87.9
Wales	1.5	4.2	19.3	8.7	77.8	6.3	47.7	4.7
Scotland	2.9	8.1	17.1	7.7	81.9	6.6	66.0	6.5
Great Britain	35.3	99.2	217.7	97.8	1,230.2	99.2	1,004.7	99.1
Northern Ireland	0.3	0.8	4.8	2.2	10.4	0.8	9.0	0.9
United Kingdom	35.6	100.0	222.5	100.0	1,240.6	100.0	1,013.7	100.0

(a) Average number employed during the year, including full and part-time employees and working proprietors.

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

(c) 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 was treated similarly.



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## CLASSIFIED LIST OF MANUFACTURING BUSINESSES

In addition to the normal range of Business Monitors the Business Statistics Office produce the **Classified List of Manufacturing Businesses** (PO 1007) which is compiled from the BSO's Register of manufacturing businesses in the UK. Updated periodically the latest issue is made up of six parts, and contains the names and addresses of some 18,000 manufacturers. The CLMB is based, for the first time, on Divisions 2 to 4 of the 1980 Standard Industrial Classification and reflects the value of sales as reported quarterly by establishments to the BSO.

**Further information can be obtained by writing or telephoning:**

### The Statistics Enquiry Point (BSO Library)

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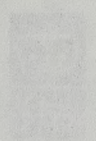
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PA428  
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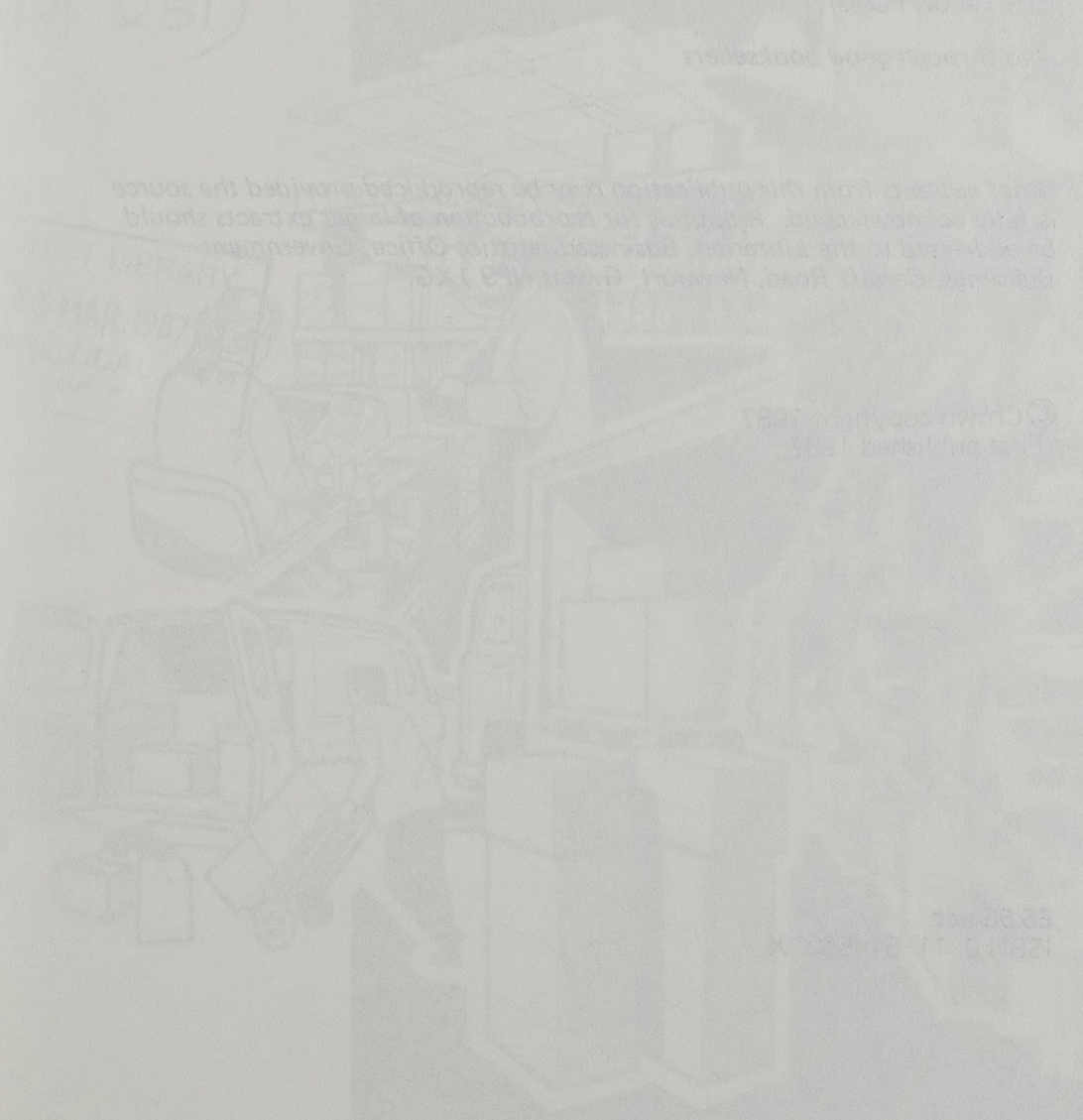
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