

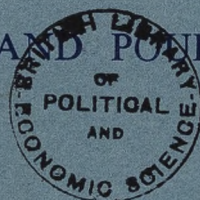
BOARD OF TRADE

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*The Report on the
Census of Production
for 1954*

Volume 9: Industry C

CATTLE, DOG AND POULTRY FOODS



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

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The Report on the Census of Production for 1954

VOLUME 9 INDUSTRY C

CATTLE, DOG AND POULTRY FOODS

THIS REPORT on the Cattle, Dog and Poultry Foods Industry relates to establishments engaged wholly or mainly in the manufacture or compounding of cattle foods, dog biscuits, fishmeal, poultry grit and spice, animal medicines and condiments, birdseed, etc.

This industry corresponds to minimum list heading 162 in the Standard Industrial Classification.

LIST OF TABLES

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

IMPORTANT NOTES and definitions appear on the next page. In interpreting the data in the tables, it is essential to bear these in mind.

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The following notes describe terms in general use in the tables of the report. More detailed explanations of the terms used and a description of the scope and method of taking the census are given in the separate booklet entitled 'The Report on the Census of Production for 1954 - Introductory Notes' (price 1s. 6d. net).

Industrial Classification: Establishments are classified to industries according to the nature of their output and, as far as possible, in conformity with the Standard Industrial Classification. Certain products are identified as the principal products of individual industries, the principal products for a given industry being of a similar nature or commonly associated in production. The principle of classification normally followed is that an establishment is classified to an industry if its output of the principal products of that industry accounted for a greater proportion of the value of its output than did its output of the principal products of any other industry.

Specialist producers normally comprise those establishments 50 per cent. or more of whose total output by value is accounted for by the characteristic products of the specialist group.

Intermediate products: For some industries figures are given showing the total quantities made during the year of intermediate products, i.e., products which may be further processed in the establishments in which they are produced.

Larger establishments: The information given in the report relates mainly to 'larger establishments', i.e., establishments of firms employing on the average more than 10 persons. In most cases an establishment comprises the whole of the premises under the same ownership or management at a particular address (e.g., a mine or factory). Offices, warehouses, laboratories and other ancillary places of business situated apart from the producing works are not regarded as separate establishments and are included in the return for the works.

Small firms are those employing on the average 10 or fewer persons.

The estimates for the industry as a whole given in Table 1 are normally obtained by increasing the other items shown in the same proportion as total employment.

Gross output (production) is the total value of goods made and other work done during the year; it is obtained by adjusting the value of sales and work done during the year for changes in the value of stocks of products on hand for sale and work in progress.

Net output is the amount left after deducting from the value of gross output the aggregate of the cost of materials and fuel used, the amount paid for work given out, and, for 1951 and 1954, any transport payments made. This represents the value added to materials by the process of production, and constitutes the fund from which wages, salaries, rents, rates and taxes, advertising and other selling expenses and all other similar charges have to be met, as well as depreciation and profits.

Sales means sales during the year of goods made in the establishment covered by the return or made on commission for it, whether produced in the year or not. The value of sales is the net selling value, i.e., the amount charged to customers, whether on an ex-works or delivered basis, and net of any trade discounts, agents' commissions, allowances for returnable cases, purchase tax, etc. For goods charged on a delivered basis to customers overseas, firms were required to give the f.o.b. value.

Materials and fuel: The total cost of materials and fuel purchased includes all purchases during the year of materials for use in production, and of fuel (includ-

ing oil, gas and electricity) for all purposes; packing materials, including the full cost of returnable cases when first purchased; workshop and office materials; water charges; materials for repairs to buildings, plant and vehicles when carried out by firms' own work-people included in their returns; consumable tools; and parts for machinery purchased as replacements. Purchases of goods for merchandising are excluded. The cost of materials and fuel used, given in Table 2, is obtained by adjusting purchases for changes during the year in the value of stocks.

Stocks: Firms were required to give stocks of materials and fuel, products on hand for sale, and work in progress, at income tax values.

Customs and Excise Duty paid on materials purchased is normally included in the cost of materials. Finished goods are similarly valued as they were sold, duty-paid or duty-free. The net amount of any duty paid is deducted in arriving at net output.

Employment: Total employment includes working proprietors, administrative, technical and clerical employees, and operatives, but excludes outworkers, canteen employees and persons engaged in merchandising or any other activity not covered by a firm's return, who are shown separately as excluded employees. Employees are persons on the pay-roll (i.e., persons whose National Insurance cards were held by employers), whether employed full-time or part-time.

Working proprietors are proprietors of businesses other than limited companies, together with members of their families who worked in the business without receiving fixed wages or salaries. Any persons working less than half the normal hours are excluded. For Northern Ireland directors of limited companies (other than those paid by fee only) are also included.

Administrative, technical and clerical employees include directors, other than those paid by fee only (except in Northern Ireland); managers, superintendents and works foremen; research, experimental, development, technical and design employees (other than operatives); draughtsmen and tracers; travellers; and office (including works office) employees.

Operatives include all other classes of employees, i.e., broadly speaking, all manual workers.

Outworkers are persons employed by the firm who work on materials supplied by the firm in their own homes.

Wages and salaries include all overtime payments, bonuses and commissions without any deductions for income tax, insurances, contributory pensions etc. They exclude payments to working proprietors.

Capital expenditure includes expenditure on new building work, and on plant, machinery and vehicles, charged to capital account during the year, including any transport and installation costs involved. It includes expenditure in respect of establishments in Great Britain which had not begun production before the end of the year (which has not previously been included in the Census of Production reports for individual industries).

Symbols used:

- .. for not available
- for nil or negligible (less than half the final digit shown).

Where figures are rounded, e.g., given to the nearest £ thousand, there may be apparent slight discrepancies between the sums of constituent items and the totals shown. In some cases, figures have been combined with others of a similar nature where publication of separate details might disclose information relating to an individual undertaking.

Industry summary: Estimates for the industry as a whole

TABLE 1

	United Kingdom			Scotland	Wales
	1948	1951	1954	1954	1954
Gross output (production)	£ million	£ million	£ million	£ million	£ million
Net output	49.3	138.0	185.6	14.22	2.39
Total stocks and work in progress	11.0	19.0	33.4	2.29	0.25
At beginning of year	4.4	13.9	19.8	1.73	0.21
Change during year	+ 1.5	+ 5.0	+ 3.3	+ 0.26	- 0.02
Capital expenditure less disposals (a)	1.3	2.4	2.4	0.21	-
Wages and salaries	5.4	7.8	10.8	0.95	0.09
Total employment (including working proprietors)	Thousands	Thousands	Thousands	Thousands	Thousands
	16.6	20.4	22.3	1.97	0.18

(a) Capital expenditure on plant, machinery and vehicles and new building work (including (except in 1948) that incurred in Great Britain for establishments not yet in production), less amounts received for plant, machinery and vehicles disposed of.

Summary of returns received

TABLE 2

	Unit	Great Britain	United Kingdom	
		1948	1951	1954
FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS				
Number of establishments	No.	178	209	229
Total value of sales and work done	£'000	36,327	109,512	150,661
Products on hand for sale	at beginning of year change during year	1,082	3,399	4,221
and work in progress		+ 315	+ 1,375	+ 287
Gross output (production) (a)		35,877	110,887	150,948
Purchases of materials and fuel		28,606	93,850	120,548
Stocks of materials and fuel	at beginning of year change during year	2,153	7,796	11,882
Cost of materials and fuel used		+ 754	+ 2,641	+ 2,393
Payment for work done on materials given out		27,852	91,209	118,155
Payment for transport (b)		6	56	41
Net output		765	4,323	5,616
Average number of employees	{ operatives others	8,019	15,298	27,137
Total employment (d)		No.	8,801	11,853
Net output per person employed (d)		3,259 (c)	4,498	5,119
Wages and salaries	{ of operatives of others	12,084	16,379	18,151
Capital expenditure		£	664	934
New building work (e)		169	309	476
Plant and machinery	{ acquisitions (e) disposals	613	1,245	1,025
Vehicles			25	26
	{ acquisitions (e) disposals	210	293	639
			54	79
FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS				
Number of returns	No.	885	758 (f)	747
Total employment, including working proprietors		4,073	3,616 (f)	3,790

(a) For the year 1948 gross output excludes payments for transport services outwards on finished goods sold. For subsequent years gross output includes payments to other firms and undertakings and to firms' own separate transport organisations for transport services.

(b) Payments to other firms and undertakings and to firms' own separate transport organisations. For the year 1948 payments cover only transport outwards of finished goods sold. For subsequent years they cover payments for transport of both finished goods sold and materials and fuel purchased.

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

(d) Excluding outworkers and including working proprietors.

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

(f) Excluding Northern Ireland. No information about small firms was collected in Northern Ireland for 1951.

CATTLE, DOG AND POULTRY FOODS

Analysis by size, 1954

Larger establishments in the United Kingdom

TABLE 3

Average number employed (a)	Estab-lish-ments	Gross output	Net output	Employees		Wages and salaries		Capital expenditure (b)	Net output per person employed (a)
				Operatives	Others	Operatives	Others		
	Number	£'000	£'000	Number	Number	£'000	£'000	£'000	£
11 - 24	82	8,741	1,275	1,057	362	434	196	251	883
25 - 49	60	13,195	2,372	1,410	671	594	376	260	1,129
50 - 99	43	17,375	3,005	2,001	946	842	516	278	1,020
100 - 199	24	19,014	3,320	2,208	987	986	540	448	1,039
200 - 299	8	21,923	3,548	1,553	458	773	276	165	1,764
300 - 399	5	21,452	3,579	1,279	340	628	220	188	2,211
400 and over	7	49,247	10,036	3,478	1,355	1,578	796	550	2,077
Total	229	150,948	27,137	12,986	5,119	5,835	2,922	2,140	1,495

(a) Excluding outworkers and including working proprietors.

(b) Capital expenditure on new building work and on acquisition of plant, machinery and vehicles, excluding expenditure for establishments not yet in production.

Analysis according to specialisation within the industry, 1954

Larger establishments in the United Kingdom

TABLE 4

	Unit	Specialist producers of		Remainder of the industry	Total	
		Feeding stuffs for animals, poultry, etc. (except dog and cat foods) (a)	Dog and cat foods			
Number of establishments	No.	196	15	18	229	
Total value of sales and work done	£'000	141,583	7,535	1,543	150,661	
Sales of characteristic products	"	133,715	5,943			
Products on hand for sale	"	3,918	252	51	4,221	
and work in progress	"	+ 203	+ 80	+ 4	+ 287	
Gross output (production)	"	141,786	7,615	1,548	150,948	
Purchases of materials and fuel	"	115,334	4,696	518	120,548	
Stocks of materials	"	11,289	450	143	11,882	
and fuel	"	+ 2,361	+ 54	- 22	+ 2,393	
Cost of materials and fuel used	"	112,972	4,643	540	118,155	
Payment for work done on materials given out	"				41	
Payment for transport	"	5,217	335	105	5,616	
Net output	"	23,597	2,637	903	27,137	
Average number of employees	{operatives others	No. "	11,280 4,004	1,272 549	434 566	12,986 5,119
Total employment (b)	"	"	15,326	1,825	1,000	18,151
Net output per person employed (b)	"	£	1,540	1,445	903	1,495
Wages and salaries	{of operatives of others	£'000 "	5,181 2,278	520 366	134 278	5,835 2,922
Capital expenditure (c)	"	"				
New building work	"	"	442	19	15	476
Plant and machinery	{acquisitions disposals	" "	924 30	71 17	31 2	1,025 48
Vehicles	{acquisitions disposals	" "	572 136	45 13	22 10	639 159

(a) See footnote (b) to Table 5.

(b) Excluding outworkers and including working proprietors.

(c) Capital expenditure at establishments not yet in production is excluded.

CATTLE, DOG AND POULTRY FOODS

Sales of the principal products of the industry, including sales of these products by establishments classified to other industries

Larger establishments in the United Kingdom

TABLE 5

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
	Th. tons	£'000	Th. tons	£'000	Number
Feeding stuffs for animals, poultry, etc. (except dog and cat foods) (a)					
Compound cakes, cubes, meals, etc.					
For cattle	996	31,479	1,401	45,570	137
For calves	104	4,700	136	5,518	111
For pigs	665	21,694	967	33,510	138
For poultry	794	26,988	1,042	35,945	145
Other sorts	11	331	50	1,575	75
Unclassified	202	6,579	23	948	9
			..	897	
Molassed feeds, containing not less than 30 per cent molasses	21	473	33	692	18
Livestock concentrates and mixtures	66	2,693	121	5,272	49
Fishmeal (including herring meal)	64	2,637	70	4,509	22
Meat meal, meat and bone meal, bone meal and sterilised bone flour	22	513	31	1,042	31
Bird seeds, prepared and mixed	3	267	2	178	14
	..	177	..	345	
Oil seed cake purchased and kibbled or ground (b)	12	387	11	440	9
Other feeding stuffs	104	2,478	88	1,853	97
	..	319	..	216	
Unclassified	24	650	35	1,279	37
Dog and cat foods (c)					
Biscuits	27	2,006	21	1,775	18
Meal	9	757	12	941	15
			..	124	
Canned	(d)	(d)	56	5,059	14
Other	29(e)	3,166	2	212	14
			..	8	
Medicines, spices and condiments for animals, poultry, etc.	..	2,883	..	3,620	71
Waste products	..	22	..	110	17
Work done for the trade or on commission (f)		422		219	28
Total		111,621		151,858	..
Sales in other industries (see Table 6)		6,999		7,106	..
Principal products of this industry sold by establishments in the industry		104,622		144,752	210

(a) Excluding animal feeding stuffs produced as a by-product of seed crushing or grain milling, for which see the Seed Crushing and Oil Refining Industry (Volume 2, Industry P), and the Grain Milling Industry (Volume 8, Industry A), respectively.

(b) So far as recorded separately.

(c) The figures for 1951 refer to 'Dog foods' only.

(d) Not separately recorded.

(e) Corrected figure.

(f) Amount charged.

CATTLE, DOG AND POULTRY FOODS
Sales of principal products of the industry by establishments
classified to other industries
Larger establishments in the United Kingdom

TABLE 6

	1954			Principal industries in which produced (a)
	Quantity	Value	Entries	
	Th. tons	£'000	Number	
Feeding stuffs for animals, poultry, etc. (b)				
Compound cakes, cubes, meals, etc.	28	930	11	2C, 2J, 8F, 9G
Fishmeal (including herring meal)	10	601	..	2C, 2O
Meat meal, meat and bone meal, bone meal and sterilised bone flour	19	543	13	2C, 2Q, 8D
Oil seed cake purchased and kibbled or ground	11	440	9	8A
Other feeding stuffs, including molassed feeds, containing not less than 30 per cent molasses, bird seeds prepared and mixed, and dog and cat foods	15	597	13	2Q, 8B, 8C, 9G
Unclassified	..	116
Medicines, spices and condiments for animals, poultry, etc.	35	1,279	37	2O, 2Q
	..	2,371	52	2C, 2E, 2F
Total		7,106	..	

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

(b) See footnote (a) to Table 5.

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

TABLE 7

	1954	
	Quantity	Value
	Th. tons	£'000
Oats, crushed and ground	16	441
Barley products		
Meal	42	1,138
Barley flour, and pearled, blocked, flaked, puffed and pot barley; other barley products and by-products	3	79
Maize products		
Meal and flour	17	545
Flaked maize not fit for human consumption	..	70
Other maize products and by-products	31	1,016
Other manufactured cereals	29	928
Fertilisers, prepared or manufactured	1	44
Compound fertilisers	28	512
Other	..	378
Disinfectants, oils, fats and greases	10	114
Other goods	..	449
	..	195
Total		5,909

(58456)

TABLE 8 - Total make of intermediate products
Larger establishments in the United Kingdom
This table is not applicable to the industry.

Purchases of materials and fuel, 1954
Larger establishments in the United Kingdom

TABLE 9

	Quantity	Cost
	Th. tons	£'000
Materials		
Cereals and cereal by-products		
Barley	775	17,708
Maize	346	9,414
Maize meal, flour and by-products	69	1,879
Oats	129	2,918
Rice bran	72	1,625
Wheat flour, damaged or otherwise unfit for human consumption and wheat by-products	761	17,411
Other descriptions (including reconditioned damaged cereal foods)	370	8,109
Oil-seed cakes and meals (including extract meals)		
Groundnut	225	8,943
Linseed	67	2,647
Other descriptions	522	14,852
Molasses	180	1,772
Milk products (including whey powder and butter milk powder)	22	1,331
Meat meal, meat and bone meal, bone meal and sterilised bone flour	79	3,593
Fish meal and fish waste	314	7,726
Packing materials	Th. cwt.	
Paper sacks	39	173
	..	79
Sacks and bags of textile materials	Th. hundreds	
	2,061	5,635
Cardboard boxes, cartons and fibreboard packing cases	Th. cwt.	
	38	166
All other packing materials	..	105
Replacement parts for machinery, plant and vehicles and consumable tools bought as replacements	..	1,389
All other purchased materials	..	955
Materials unclassified	..	6,048
Fuel and electricity	..	4,259
Coal	Th. tons	
	90	377
Coke	6	32

(58456)

TABLE 9 (contd.)

	Quantity	Cost
	Th.gal.	£'000
Fuel and electricity (contd.)		
Liquid fuels (including creosote/pitch mixtures)		
For use in internal combustion engines		
Motor spirit (petrol) for use in road vehicles and derv. fuel	1,658	314
Other	163	11
	..	3
For burning in furnaces, boilers, kilns, etc.	2,155	101
	..	26
	Th.therms	
Gas purchased	796	46
	..	6
	Th.kWh.	
Electricity purchased (a)	136,372	721
	..	76
All other purchased fuel	..	19
Total cost		120,548

(a) The total quantity of electricity generated in firms' own establishments in this industry in 1954 was 1,061 Th.kWh.

Average number of employees, and wages, salaries and superannuation payments

Larger establishments in the United Kingdom (a)

TABLE 10

	1951	1954
	Number	Number
Average number of employees		
Operatives	11,853	12,986
Administrative, technical and clerical employees	4,498	5,119
Total	16,351	18,105
Wages and salaries paid to		
	£'000	£'000
Operatives	4,195	5,835
Administrative, technical and clerical employees	2,092	2,922
Total	6,286	8,757
Wages and salaries per head		
	£	£
Operatives	354	449
Administrative, technical and clerical employees	465	571

(58456)

TABLE 10 (contd.)

	1951	1954
		£'000
Superannuation and other pension funds for employees and dependents (b)		
Employers' contributions	..	278
Employees covered	..	9,267
		£'000
Pension, etc. payments to former employees and dependents (b)	..	41

(a) The following persons, not included above, were also employed by larger establishments in this industry ('other workers' includes, for example, employees engaged in merchandising)

	United Kingdom	
	1951	1954
Canteen workers		
Males	8	7
Females	175	204
Total	183	211
Other workers		
Males	647	1,684
Females	108	166
Total	755	1,850
Total excluded employees	938	2,061

(b) The figures given relate to larger establishments in Great Britain only.

Employment in a specified week (a)
Larger establishments in the United Kingdom

TABLE 11

	1951			1954		
	Males	Females	Total	Males	Females	Total
	Number					
Working proprietors	27	1	28	41	5	46
Operatives	10,757	1,313	12,070	11,721	1,471	13,192
Administrative, technical and clerical employees	2,967	1,643	4,610	3,361	1,964	5,325
Total employees	13,724	2,956	16,680	15,082	3,435	18,517

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

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- P. Made-up Household Textiles
- Q. Textile Finishing
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- C. Biscuit
- D. Bacon Curing and Sausage

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- G. Ice Cream
- H. Sugar and Glucose
- I. Cocoa, Chocolate and Sugar Confectionery
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