

69 Surgical instruments and appliances

This Report on the Surgical Instruments and Appliances Industry relates to establishments engaged wholly or mainly in manufacturing surgical cutlery, dental instruments, splints, trusses, artificial eyes, artificial teeth and artificial limbs and other surgical and dental appliances except items made of plastics materials; spectacles, monocles, goggles, etc including frames and lenses. Electro-medical equipment and X-ray apparatus are excluded. Dispensing opticians other than wholesale are also excluded.

This industry corresponds to minimum list heading 353 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 formed part of the Scientific, Surgical and Photographic Instruments, etc Industry (Part 53) in the last detailed Census of Production for 1963, comprising part of the sub-division 'Spectacles etc' and the sub-division 'Surgical, dental and veterinary instruments and appliances', with the following exceptions: oxygen breathing apparatus are now included whereas electro-medical apparatus and hearing aids with valve or transistor amplification are excluded and included in the report on Radio, Radar and Electronic Capital Goods (Part 77); artificial teeth, crowns and facings and all other dental goods of plastics manufacture as well as artificial eyes and limbs of plastics manufacture are included in the report on Plastics Products (Part 149); and ophthalmic instruments and appliances and parts thereof are included in the report on Scientific and Industrial Instruments and Systems (Part 70).

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. However the reclassification of small firms, which provided limited information only, has been arbitrary.

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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(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.

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

	Unit	All establishments		
		1963	1968	
Number of enterprises	No.	765	787	
Number of establishments	"	837	894	
Gross output	£'000	46,712	77,095	
Net output	"	25,959	42,535	
Net output per head	£	1,012	1,502	
Sales and work done	£'000	goods produced and work done (c)	40,066	66,775
		merchanted goods and canteen takings	6,588	8,645
Purchases	"	materials for use in production and packaging and fuel	15,025	27,882
		goods for merchandising and canteen purchases	5,509	5,991
Payments to other organisations	"	for work done on materials given out	302	831
		for transport	148	202
		by road		
	"	by rail and other means excluding postal services		165
Stocks and work in progress				
Total stocks and work in progress	"	change during year	+ 289	+ 2,186
		at end of year	10,676	20,208
Goods on hand for sale	"	change during year	- 369	+ 996
		at end of year	2,887	6,837
Work in progress	"	change during year	+ 427	+ 679
		at end of year	3,674	4,630
Materials, stores and fuel	"	change during year	+ 231	+ 511
		at end of year	4,114	8,741
Number employed on average during the year	Th.	total, including working proprietors	25.6	28.3
		operatives	19.7	21.2
		other employees (d)	4.9	6.3
Wages and salaries	£'000	of operatives	11,509	16,630
		of other employees (d)	4,171	7,444
Capital expenditure (e)				
Total	"	1,082	2,055	
New building work	"	289	184	
Land and existing buildings (f)	"	47	133	
Plant and machinery (f)	"	694	1,455	
Vehicles (f)	"	146	283	

(a) For 1968, estimates for establishments not making satisfactory returns and for small establishments, from which only employment data were collected, accounted for 20 per cent. of the total figures in which they were incorporated: of this, unsatisfactory returns were less than 1 per cent. For 1963 the comparable figures were 22 per cent. and 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	645	701
Average number employed:		
Working proprietors	935	735
Other persons employed	4,847	5,082

Footnotes continued on page 69/2.

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
	Number	Number	Number	£'000	£'000	£
1-5	326	320	967	..	..	..
6-10	156	153	1,176	..	..	..
11-24	215	195	3,641	..	..	..
25-49	71	64	2,592	6,801	3,586	1,384
50-99	60	58	4,323	12,307	6,421	1,485
100-199	34	32	4,816	12,889	7,386	1,534
200-299	12	8	2,799	7,572	5,017	1,792
300-399	6	6	2,116	6,521	3,412	1,613
400 and over	7	7	5,823	15,109	7,903	1,359
Unsatisfactory returns	7	6	70	..	..	..
Total	894	787	28,323	77,095(c)	42,535(c)	1,502(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	2,064	486	1,614	644	782	1,325
50-99	3,294	990	2,335	1,172	709	1,184
100-199	3,689	1,116	2,835	1,296	769	1,161
200-299	1,971	828	1,603	861	813	1,040
300-399	1,612	504	1,383	671	858	1,332
400 and over	4,635	1,188	3,740	1,384	807	1,165
Unsatisfactory returns	..	..	..	..	..	..
Total	21,218(c)	6,275(c)	16,630(c)	7,444(c)	784(c)	1,186(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	4	3	7
18 and over	53	40	93
All ages	57	43	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 17 establishments in 1968 and 31 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 £93,000 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)				Total	
		Surgical, dental and veterinary instruments and appliances 10		Spectacles etc 20		Total	
		1963	1968	1963	1968	1963	1968
Number of enterprises	No.	74	80	76	68	149	149
Number of establishments	"	96	110	123	97	219	219
Gross output	£'000	18,947	38,821	17,289	22,951	36,237	61,777
Net output	"	11,580	21,803	8,558	12,278	20,138	34,089
Net output per head	£	1,109	1,625	906	1,323	1,012	1,500
Sales and work done	£'000	17,486	33,463	13,595	20,041	31,081	53,500
Sales of characteristic products	"	11,816	25,715	12,971	18,916	(f)	(f)
Index of specialisation (g)	Per cent.	68	77	95	94	87	84
Purchases	£'000	6,034	13,449	5,621	8,892	11,655	22,341
Payments to other organisations	"	1,144	2,940	3,130	1,860	4,274	4,800
Stocks and work in progress	"	209	636	25	30	234	668
Goods on hand for sale	"	91	123	24	38	115	162
Work in progress	"	129	129	4	4	4	133
Materials, stores and fuel	"	278	597	8	201	286	798
Number employed on average during the year	No.	10,445	13,415	9,449	9,279	19,894	22,694
Wages and salaries	£'000	7,968	9,828	7,912	7,614	15,880	17,442
Wages and salaries per head	£	2,437	3,545	1,487	1,613	3,924	5,158
Capital expenditure (i)	£'000	5,047	8,168	4,206	5,502	9,253	13,670
New building work	"	2,084	4,274	1,271	1,845	3,355	6,119
Land and existing buildings	"	855	1,206	855	1,144	855	1,186
Plant and machinery	"	174	82	50	65	224	148
Vehicles	"	23(j)	109(j)	60(j)	3(j)	68	243
	"	344	762	226	447	570	1,209
	"	9	20	23	22	32	42
	"	99	246	98	134	198	380
	"	43	93	41	61	85	153

For notes to this table - see page 69/5.

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		Enterprises	Entries
	Quantity	Value	Quantity	Value		
10		£'000		£'000	Number	Number
Dental instruments, appliances and equipment						
Artificial teeth, crowns and facings (other than of plastics)	..	(b)	..	256	*	*
Dental instruments (including burs)	..		..	896	8	8
Other dental surgery and laboratory equipment	..	2,842	..	961	9	10
All other dental goods (other than of plastics) (c)	..		..	1,382	8	8
10						
Medical, surgical, veterinary and dissecting instruments, appliances and equipment (other than optical, ophthalmic, dressings and electro-medical equipment)						
Medical, surgical, veterinary and dissecting instruments (excluding optical instruments)	..	3,962	..	7,217	38	40
Surgical hosiery	Thousands	1,986	Thousands	2,915	20	24
Artificial limbs (other than of plastics) (d)	..	1,220	..	1,999	*	6
Other appliances (including trusses and artificial eyes but excluding surgical boots) other than of plastics (e)	..	1,737	..	2,861	25	25
Protective masks and respirators (excluding gauze masks)	..	(f)	..	1,203	7	7
Sterilising equipment (including autoclaves)	..	1,265	..	1,807	17	18
Aseptic hospital furniture	..	694	..	1,209	17	17
Other equipment (including anaesthetic, resuscitation and oxygen breathing apparatus)	..	3,926	..	6,506	32	35
Total dental, medical, surgical, veterinary and dissecting instruments, appliances and equipment		17,258(g)		30,474	..	..
20						
Spectacles						
Sunglasses and parts of spectacles, pince-nez, eyeglasses and monocles						
Spectacle frames and mounts and parts thereof	..	3,686	..	4,490	39	52
Sunglasses with unworked lenses	..		{ 582	322	16	23
Finished lenses, optically worked, mounted or unmounted, sold separately			..	161		
Glass lenses						
Single-vision	{ 27,259	3,136	{ 22,644	3,252	21	25
Bifocal	..	459	{ 1,613	1,720	21	27
Plastic lenses			..	311		
Single-vision			..	177	13	13
Bifocal			..	60	11	11
Total spectacles		7,281		10,493	..	..

Continued on next page.

TABLE 5 (continued)

Industry sub-division (a)	1963		1968			
	Quantity	Value	Quantity	Value	Enter-prises	Entries
		£'000		£'000	Number	Number
Other products	..	401	..	2	*	*
Waste products	..	10	..	44	17	18
Work done						
20 Ophthalmic prescription and repair work	..	5,832	..	8,457	50	64
10 Repair work on surgical instruments	..	145	..	271	14	17
Other work done	..	167	..	174	17	18
Total		31,096		49,915	..	..
Sales in other industries (see Table 6)		4,044		5,177	..	..
Principal products of this industry sold by establishments in the industry		27,052		44,738	147	182(h)

(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) Artificial teeth, crowns and facings were not distinguished by type of materials from which they were made for 1963: total sales were valued at £680,000 and are included in the 1968 report on the Plastics Products Industry, (Part 149.)

(c) For 1963 dental goods of plastics were not specifically excluded.

(d) For 1963 artificial limbs of plastics were not specifically excluded.

(e) For 1963 other appliances of plastics were not specifically excluded.

(f) Not recorded separately for 1963.

(g) For 1963 artificial teeth and protective masks and respirators were excluded.

(h) 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		
	Value	Value	Entries	Principal industries in which produced (a)
	£'000	£'000	Number	
Dental instruments, appliances and equipment	48	138	6	67,70,149
Medical, surgical, veterinary and dissecting instruments, appliances and equipment (other than optical, ophthalmic, dressings and electro-medical equipment)				
Medical, surgical, veterinary and dissecting instruments (excluding optical instruments)	605	1,937	9	31,52,70,149
Surgical hosiery	223	178	*	104,107
Other appliances (including artificial limbs, trusses and artificial eyes but excluding surgical boots) other than of plastics	534	463	9	42,77,87,122
Sterilising equipment (including autoclaves)	550	684	10	47,62,70,78
Aseptic hospital furniture	154	316	9	42,64,82,94
Other equipment (including anaesthetic, resuscitation and oxygen breathing apparatus)	1,707	1,404	19	52,63,70,77
Spectacles, ophthalmic prescription and repair work and repair work on surgical instruments	223	57	5	68,70,87,149
Total	4,044	5,177	..	

(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
	Value	Value
	£'000	£'000
Mechanical engineering products	242	432
Scientific and industrial instruments	784	761
Electro-medical and surgical equipment and other electrical goods	146	251
Miscellaneous metal manufactures	275	334
Travel goods and small cases of leather	30	163
Footwear of all kinds	100	121
Artificial limbs, artificial teeth and other dental, medical and surgical components of plastics	70(a)	954
Other products	1,383	3,679
Repair work for customers	804	1,197
Services rendered to other organisations (b)	195	873
Total value of goods sold without having been subjected to any manufacturing process (merchanted or factored)	5,020	6,819
Canteen takings	91	108
Total	9,140	15,693

(a) For 1963 dental goods and artificial limbs of plastics, were not separately distinguished as such and are included as principal products of this industry (see Table 5).

(b) 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	Th.tons	£'000	Th.tons	£'000
Steel bars and rods (including wire rods), angles, shapes and sections, girders, beams, joists and pillars rolled (not fabricated), including tube rounds and squares	1.2	168	1.3	302
	..	176	..	93
Iron and steel not elsewhere specified except finished parts, wire and scrap	0.7	99	1.0	230
	..	129	..	105
Light metals and non-ferrous metals in all forms except finished parts, wire and scrap				
Aluminium and aluminium alloys	0.3	128	0.3	186
	..	..	..	132
Brass and other copper alloys (including nickel silver and cupro-nickel, but excluding all other nickel alloys and cadmium copper) (a)	0.4	139	0.4	254
	..	110	..	145
Gold and rolled gold	..	(b)	..	108
Silver and manufactures of silver	..	119	..	437
General chemicals (c)				
Inorganic (including inorganic gases)			..	151
Organic (including organic gases)	..	229	..	63
Other (eg mixtures of inorganic and organic chemicals)			..	99
Synthetic resins and plastics materials (excluding leathercloth and reinforced plastics)				
Phenolics and allied products: resins (the net resin content), solutions, emulsions, dispersions, moulding and extrusion compounds (d)	..	212	..	299
Thermosetting polyesters, including epoxide resins (the net resin content excluding filler) and resin glass fibre mixtures	Th.cwt.		Th.cwt.	
	1.4	23	5.5	128
	..	6	..	17
Manufactures wholly or mainly of rubber and synthetic rubber (including sheeting, but excluding replacement parts for firms' own machinery, plant and vehicles, etc)	..	173	..	1,363
Woven piece goods (other than narrow fabrics) wholly or mainly of cotton	Th.sq.yds.		Th.sq.yds.	
	301	48	293	126
	..	10	..	268
Optical glass (including glass for spectacle lenses) in unworked form	..	676	..	1,031
Semi-finished blanks for lenses (including bifocal and multi-focal blanks)	..	806	..	852
Finished lenses optically worked				
Ophthalmic (uncut or edged)				
Glass lenses				
Single-vision			{ 3,523	594
			{ ..	353
Bifocal			{ 372	151
			{ ..	107
Plastic lenses	{ 2,916	425		
	{ ..	436		
Single-vision			{ 209	66
			{ ..	61
Bifocal			{ 51	42
			{ ..	36
Other (including photographic and cinematographic)	..	1	..	57
Spectacle frames and mounts and parts thereof	..	1,532	..	3,380

Continued on next page.

TABLE 10 (continued)

	1963		1968	
	Quantity	Cost	Quantity	Cost
Materials for use in production (continued)		£'000		£'000
Cases for holding instruments, appliances, etc (other than boxes, cartons and other packaging materials)	..	56	..	94
Components, parts and accessories and semi-manufactured goods, not elsewhere specified				
Electrical (other than parts of clocks) (e)				
Motors	..	31	..	80
Valves (electronic) and semi-conductor devices	Thousands 2.1	4	Thousands 0.8	10
Other	..	116	..	251
Wholly or partly of plastics materials (other than electrical)	..	283	..	240
Other	..	1,081	..	4,278
Lubricating oils and greases (including cutting oils and emulsions)	Th.gal. 15.7	6	Th.gal. 64.7	22
Replacement parts for firms' own machinery, plant and vehicles, and accessories and consumable tools bought as replacement	..	1	..	7
Tyres and other spare parts for firms' own road goods vehicles	..	340	..	65
Other	..	..	..	281
All other materials for use in production	..	3,045	..	3,845
Packaging materials				
Paper and board				
Boxes, cartons, drums and canisters (with or without metal ends) of paper and cardboard	..	304	..	602
Fibreboard packing cases	..	..	..	23
Wrapping and packing paper (including paper coated with plastics and any laminates incorporating paper but not metal)	..	94	..	255
Plastics (other than transparent regenerated cellulose film)				
Cellular foam	..	..	..	1
Film (up to 0.01 inches thick)				
Of polyethylene	..	..	..	23
Of other plastics materials	..	122	..	30
Sheets and sheeting (thicker than 0.01 inches)	..	..	..	11
Moulded and fabricated containers including closures and inserts, but excluding re-usable crates, bottles and bottle caps and rigid and collapsible tubes	..	..	..	24
All other packaging materials	..	..	..	180
Fuel and electricity (f)			Th.tons	
Coal	..	4	1.4	8
Coke (including screenings) and manufactured fuel	Th.tons 2.8	24	0.9	11
	..	5	..	7
Derv fuel and motor spirit for use in road vehicles	Th.gal. 134	32	Th.gal. 323	98
Other liquid fuels (including creosote/pitch mixtures, etc and liquefied petroleum gases)	..	10	..	14
	..	27	..	19

TABLE 10 (continued)

	1963		1968	
	Quantity	Cost	Quantity	Cost
Fuel and electricity (f) (continued)		£'000	Th.therms	£'000
Gas	..	93	1,213	105
Electricity	Th.kWh 25,316	124	Th.kWh 41,048	392
All other fuels	..	163	..	54
(g)	..	(g)	..	40
Total cost of materials and fuel		11,655		22,341
Goods purchased for merchandising		4,183		4,681
Canteen purchases		91		119
Total cost of purchases		15,929		27,141

(a) Cadmium copper was not specifically excluded for 1963.

(b) Included with 'All other materials for use in production' for 1963.

(c) For 1963 described as 'Heavy chemicals (acids, alkalis, alcohols, other inorganic (including silver nitrate) and organic chemicals, compressed gases, etc)'.
(d) For 1963 described as 'Phenolics and cresylics: resins, solutions, emulsions, dispersions, moulding and extrusion compounds'.

(e) 'Parts of clocks' were not specifically excluded for 1963.

(f) There were no entries recorded for electricity generated in firms' own establishments in this industry in 1963 and 1968.

(g) Not recorded separately for 1963.

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.	85	151
Transport costs			
Wages and salaries	£'000	57	128
Derv fuel and motor spirit	"	42	112
Tyres and other spare parts for road goods vehicles	"	..	65
Payments to other organisations for transport	"	115	162
by road	"		
by rail and other means excluding postal services	"		133
Costs of operating road goods vehicles			
Insurance	"	8	16
Vehicle licences	"	4	14
Depreciation	"	33	68
Payments to other organisations for repairs and maintenance	"	19	32
Total	"	279(a)	730

(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	77	102
Road goods vehicles	19	32
Plant, machinery and other capital equipment	149	233
Insurance, licensing and depreciation of road goods vehicles (b)	46	97
Rates, excluding water rates	263	490
Hire of plant and machinery	29	46
Postage, telephone, telegrams, cables and telex (c)	297	517
Total	880	1,517

(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)	2.7	1.6
May	1.1	0.9
June	7.7	7.1
July	0.5	0.3
August	2.7	1.2
September	8.8	8.0
October	1.6	0.7
November	2.2	1.4
December	48.0	49.1
1969		
January	1.6	0.6
February	1.1	0.3
March	18.2	25.5
April (b)	3.8	3.3
	100	100

(a) From 6 April.

(b) To 5 April.