

19 Brewing and malting

This Report on the Brewing and Malting Industry relates to establishments engaged wholly or mainly in brewing beer and in malting barley. Bottling and canning by brewers is included, but establishments engaged wholly or mainly in bottling or canning drinks purchased from other firms (or in bottling or canning on commission) are excluded.

This industry corresponds to minimum list heading 231 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 definition of this industry however is unchanged from the last detailed Census of Production for 1963 in which it was reported (Part 18).

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.	207	151
Number of establishments	"	578	383
Gross output	£'000	724,340	1,065,741
Net output	"	218,324	293,176
Net output per head	£	2,514	3,645
Sales and work done	£'000	523,058	718,823
		merchanted goods and canteen takings	345,055
Net amounts payable in respect of	"	Customs and Excise duty	382,299
	"	materials for use in production and packaging and fuel	107,833
Purchases	"	goods for merchandising and canteen purchases	275,361
	"	for work done on materials given out	448
Payments to other organisations	"	for transport	4,784
	"	by road	1,504
	"	by rail and other means excluding postal services	
Stocks and work in progress	"	change during year	+ 1,526
Total stocks and work in progress	"	at end of year	82,526
	"	change during year	+ 1,260
Goods on hand for sale	"	at end of year	31,598
	"	change during year	+ 603
Work in progress	"	at end of year	16,002
	"	change during year	- 336
Materials, stores and fuel	"	at end of year	34,926
Number employed on average during the year	Th.	total, including working proprietors	80.4
	"	operatives	57.7
	"	other employees (d)	22.7
Wages and salaries	£'000	of operatives	59,754
	"	of other employees (d)	29,034
Capital expenditure (e)	"	Total	43,741
	"	New building work	17,773
	"	Land and existing buildings (f)	- 4,459
	"	Plant and machinery (f)	27,483
	"	Vehicles (f)	2,944

(a) For 1968, estimates for establishments not making satisfactory returns and for small establishments, from which only employment data were collected, accounted for 2 per cent. of the total figures in which they were incorporated: of this, unsatisfactory returns accounted for less than 1 per cent. For 1963 the comparable figures were 1 per cent. and negligible 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	240	160
Average number employed:		
Working proprietors	47	27
Other persons employed	2,861	1,966

Footnotes continued on page 19/2.

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

(i) Output and employment

All establishments: United Kingdom

Number employed on average during the year by the establishment (a)	Estab-lish-ments	Enter-prises (b)	Total number employed on average during the year (a)	Gross output	Net output	Net output per head
1-5	33	27	112	..	..	..
6-10	42	34	352	..	..	..
11-24	81	43	1,477	..	..	..
25-99	85	60	4,604	61,797	16,992	3,691
100-199	37	23	5,318	72,081	17,150	3,225
200-299	29	21	6,930	94,644	25,547	3,686
300-399	16	13	5,396	74,928	20,605	3,819
400-499	14	11	6,305	74,699	22,467	3,563
500-749	11	7	6,313	84,150	25,846	4,094
750-999	7	5	6,240	79,093	20,014	3,207
1,000-1,499	12	6	14,132	186,579	60,985	4,315
1,500-1,999	3	3	5,421	79,011	16,314	3,009
2,000 and over	7	7	17,688	229,951	59,834	3,383
Unsatisfactory returns	6	5	155	..	..	..
Total	383	151	80,443	1,065,741(c)	293,176(c)	3,645(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	..	..	..	..	..	..
25-99	3,495	1,092	3,184	1,535	911	1,406
100-199	3,830	1,484	3,615	1,789	944	1,206
200-299	4,986	1,940	4,791	2,356	961	1,215
300-399	3,956	1,432	4,035	1,749	1,020	1,222
400-499	4,412	1,893	4,067	2,189	922	1,157
500-749	4,444	1,869	4,367	2,363	983	1,264
750-999	4,313	1,927	4,776	2,543	1,107	1,320
1,000-1,499	10,227	3,905	10,933	4,570	1,069	1,170
1,500-1,999	4,087	1,334	5,092	1,823	1,246	1,367
2,000 and over	12,397	5,292	13,298	7,443	1,073	1,406
Unsatisfactory returns	..	..	..	..	..	..
Total	57,678(c)	22,697(c)	59,754(c)	29,034(c)	1,036(c)	1,279(c)

(a) Including working proprietors.

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

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

(d) Administrative, technical and clerical employees.

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

All establishments: United Kingdom

Ages	Males	Females	All employees
	Per cent.	Per cent.	Per cent.
Under 18	1	1	2
18 and over	79	19	98
All ages	80	20	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 56 establishments in 1968 and 163 in 1963.
- (b) 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).
- (c) Direct sales of goods (excluding canteen takings) made to, and work done for, the general public by larger establishments are included. These amounted to £2,572,000 in 1968. Similar information is not available for 1963.
- (d) This is the ratio of total sales of principal products by the industry to total sales of goods produced and work done.
- (e) Drawbacks and allowances receivable on goods exported, deposited etc. (including spoilt beer allowances) amounted to £9,564,000 in 1968 and £7,408,000 in 1963.
- (f) Administrative, technical and clerical employees.
- (g) Excluding expenditure for establishments not yet in production.

TABLE 4 Analysis of larger establishments, 1963 and 1968

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

	Unit	1963	1968	
Number of enterprises	No.	141	104	
Number of establishments	"	497	277	
Gross output	£'000	714,613	1,048,412	
Net output	"	215,392	288,409	
Net output per head	£	2,514	3,645	
Sales and work done	{ goods produced and work done (b)(c)	£'000	516,035	707,135
	{ merchanted goods and canteen takings	"	197,750	339,445
Index of specialisation (d)	Per cent.	99	99	
Net amounts payable in respect of Customs and Excise duty (e)	£'000	250,962	376,083	
Purchases	{ materials for use in production and packaging, and fuel	"	90,985	106,080
	{ goods for merchenting and canteen purchases	"	153,827	270,883
Payments to other organisations	{ for work done on materials given out for transport	"	597	441
	{ by road	"	5,200	4,706
	{ by rail and other means excluding postal services	"		
Stocks and work in progress				
Goods on hand for sale	{ change during year	"	+ 771	+ 1,239
	{ at end of year	"	25,074	31,084
Work in progress	{ change during year	"	+ 58	+ 593
	{ at end of year	"	9,553	15,742
Materials, stores and fuel	{ change during year	"	+ 2,350	- 331
	{ at end of year	"	30,050	34,358
Number employed on average during the year	{ total, including working proprietors	No.	85,665	79,135
	{ operatives	"	63,606	56,759
	{ other employees (f)	"	22,054	22,335
Wages and salaries	{ of operatives	£'000	45,096	58,802
	{ of other employees (f)	"	21,367	28,571
Wages and salaries per head	{ operatives	£	709	1,036
	{ other employees (f)	"	969	1,279
Capital expenditure (g)				
New building work	£'000	15,165	17,484	
Land and existing buildings	{ acquisitions	"	4,214	2,435
	{ disposals	"	4,865	6,821
Plant and machinery	{ acquisitions	"	16,125	27,762
	{ disposals	"	1,466	726
Vehicles	{ acquisitions	"	3,531	4,187
	{ disposals	"	921	1,292

For notes to this table - see page 19/5

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

	1963		1968		Enterprises	Entries
	Quantity	Value	Quantity	Value		
Beer (including ale, stout, porter, etc, but excluding black beer) brewed	Th. bulk barrels of 36 gal.	£'000	Th. bulk barrels of 36 gal.	£'000	Number	Number
Bottled	6,145	131,602	5,745	149,671	81	130
Canned	342	7,110	564	14,895	34	48
Other	22,019	345,328	25,189	501,218	85	144
Total beer (including ale, stout, porter, etc, but excluding black beer) brewed	28,506	484,041	31,498	665,784	..	..
Malt	Th. cwt.		Th. cwt.			
Malt flour	11,038	26,227	12,802	29,984	28	41
Grains			86.1	362	*	*
Wet	8,048	1,057	6,639	953	81	133
Dry	952	1,113	..	289		
Malt commings and other offals (including cereal screenings and other cereal offals)	..	616	1,325	1,742	13	16
Other products	..	44	..	1,007	45	67
Waste products	..	141	..	156	13	16
Work done				241	28	44
Malting		569		85	6	6
Other work done		124		107	6	6
Total		513,932		700,710	..	..
Sales in other industries (see Table 6)		1,669		1,277	..	..
Principal products of this industry sold by establishments in the industry		512,263		699,433	104	171(a)

(a) 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

Sales of principal products by larger establishments classified to other industries amounted to £1,277,000 in 1968 and £1,669,000 in 1963. Owing to the risk of disclosure of information relating to individual firms separate particulars cannot be given.

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

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

	1963		1968	
	Quantity	Value	Quantity	Value
Yeast	Th.cwt. 549	£'000 438	Th.cwt. ..	£'000 580
Soft drinks (except fruit juices)	Th.gal.		Th.gal.	
Concentrated, in liquid form (including squashes and cordials and unsweetened concentrated drinks)	363	253	344	235
Unconcentrated				
Cola-based drinks	..	(a)	88.1	37
Other (including soda water and non-alcoholic wines and cider)	3,443	926	5,584	1,810
Other products	..	931	..	1,364
Services rendered (b)		1,225		3,676
Merchanted goods				
Purchased liquors, etc, bottled or canned	Th.bulk barrels of 36 gal.		Th.bulk barrels of 36 gal.	
Beer (including ale, stout, porter etc)	2,780	69,295	4,578	129,042
Whisky	Th.proof gal. 288	4,253	Th.proof gal. 312	5,689
Gin	..	1,108	..	1,503
Other spirits	240	2,957	172	3,140
Other spirits	357	5,623	..	895
Other spirits	..	2,510	248	4,353
Other spirits	..	..	..	4,303
Imported wines	Th.gal. 1,224	4,141	Th.gal. 1,275	5,256
Alcoholic cider and perry	..	1,084	..	2,213
Soft drinks (except fruit juices)	3,279	1,294	3,668	2,093
Other purchased liquors, etc (including vinegar)	..	329	..	657
Other goods merchanted or factored	1,582	742	1,424	771
Other goods merchanted or factored	..	..	..	499
Other goods merchanted or factored	86.4	147	663	878
Other goods merchanted or factored	..	202	..	253
Canteen takings	..	103,588	..	177,285
		477		614
Total		201,522		347,147

(a) Not recorded separately for 1963.

(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

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

	1963		1968					
	Quantity returned in this industry	Quantity returned in all industries	Returned in this industry			Returned in all industries		
			Quantity	Enter-prises	Entries	Quantity	Enter-prises	Entries
Malt	Th.cwt. 12,934	Th.cwt. 15,373	Th.cwt. 14,816	Number 38	Number 47	Th.cwt. 17,502	Number 54	Number 68

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

This table is not applicable to this industry.

TABLE 10 Purchases by larger establishments in the industry, 1963 and 1968

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

	1963		1968	
	Quantity	Cost	Quantity	Cost
Materials for use in production		£'000		£'000
Barley, unprocessed				
Home grown	..	20,245	..	23,129
Imported	..	699	..	714
Other cereals and cereal products				
Home grown or manufactured in the U.K.	..	971	..	1,268
Imported	..	93	..	137
Malt	..	20,424	..	22,532
Malt extract (including malt extract syrup)	..	745	..	535
Sugar (including liquid sugar)	..	5,474	Th.cwt. 1,706	5,311
Syrup (excluding malt extract syrup) and saccharum and glucose	..	734	..	715
Hops and hop oils	..	8,914 ^(a)	..	8,547
Hop concentrates and extracts	..	..	..	132
Fruit juices	..	101	..	67
Carbon dioxide	..	(b)	..	990
Citric, tartaric and phosphoric acids	..	59	..	40
Finings (excluding isinglass)	..	367	..	314
Isinglass	..	245	..	289
Water	..	666	..	1,016
Lubricating oils and greases	Th.gal. 165	65	Th.gal. 223	91
Replacement parts for firms' own machinery, plant and vehicles, and accessories and consumable tools bought as replacement	..	15	..	15
Tyres and other spare parts for firms' own road goods vehicles	..	3,240	..	1,632
Other	..	..	..	3,180
All other materials for use in production	..	5,216	..	5,308
Packaging materials				
Paper and board				
Boxes, cartons, drums and canisters (with or without metal ends) of paper and cardboard	..	344	..	747
Fibreboard packing cases	..	..	..	55
Wrapping and packing paper (including paper coated with plastics and any laminates incorporating paper but not metal)	..	854	..	26
Other packaging materials of paper and paperboard (including moulded pulp units and labels, but excluding bags and multiwall paper sacks) (c)	..	..	..	696
Metal				
Cans and boxes	..	1,735	..	4,622
Barrels, kegs and drums	Thousands 266	3,567	Thousands 231	3,046
Other packaging materials of metal (other than aluminium) including crown corks, wire, foil and any laminates incorporating foil, foil labels and foil closures, tensional steel strappings, etc	..	2,283	..	2,705

TABLE 10 (continued)

	1963		1968	
	Quantity	Cost	Quantity	Cost
Packaging materials (continued)		£'000		£'000
Timber				
Containers wholly or mainly of wood				
Casks	..	484	..	181
Crates, cases, etc	..	1,456	..	889
Timber (sawn or planed) for manufacture or repair of casks, cases, etc	Th.cu.ft. 271	428	Th.cu.ft. 99.5	135
	..	108	..	81
Glass containers (including glass syphons)	Thousands 146,481	1,923	Thousands 91,207	1,290
Plastic moulded and fabricated containers including closures and inserts				437
Re-usable crates (including bottle crates)			..	963
Large containers (with a capacity exceeding 1 gallon)	..	(b)	..	32
Bottles and bottle caps	..	89	..	560
Jute and hessian piece-goods, sacks and bags	..	274	..	69
All other packaging materials	..	..	..	285
Fuel and electricity (d)	Th.tons		Th.tons	
Coal	470	2,837	301	1,772
Coke (including screenings) and manufactured fuel	22.3	196	13.8	119
Derv fuel and motor spirit for use in road vehicles	Th.gal. 9,797	1,905	Th.gal. 9,925	2,461
Other liquid fuels (including creosote/pitch mixtures, etc and liquified petroleum gases)	46,691	1,850	..	314
Gas	Th.therms 1,416	116	Th.therms 1,405	2,168
	..	21	..	653
Electricity	Th.kWh 267,252	1,940	Th.kWh 292,946	137
All other fuels	..	(b)	..	17
				1,348
				129
		90,984		106,080
Goods purchased for merchandising		65,155		104,251
Liquors, etc purchased for bottling or canning		88,051		165,742
Other goods for merchandising or factoring		621		889
Canteen purchases				
		244,811		376,963

(a) For 1963 described as 'Hops' only.

(b) Not recorded separately in 1963.

(c) For 1963 multiwall sacks only were specifically excluded.

(d) The total quantity of electricity generated in establishments employing 25 or more persons in this industry was 18,202 Th.kWh in 1968, and 42,236 Th.kWh in 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.	15,093	16,814
Transport costs			
Wages and salaries	£'000	13,009	20,221
Derv fuel and motor spirit	"	1,905	2,775
Tyres and other spare parts for road goods vehicles	"	..	1,632
Payments to other organisations for transport	{ by road by rail and other means excluding postal services	{ 5,200	{ 4,706
			1,479
Costs of operating road goods vehicles			
Insurance	"	343	404
Vehicle licences	"	524	1,045
Depreciation	"	1,923	2,298
Payments to other organisations for repairs and maintenance	"	695	1,021
Total	"	23,598 (a)	35,581

(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	6,852	7,829
Road goods vehicles	695	1,021
Plant, machinery and other capital equipment	2,144	2,999
Insurance, licensing and depreciation of road goods vehicles (b)	2,790	3,747
Rates, excluding water rates	2,371	3,970
Hire of plant and machinery	257	649
Postage, telephone, telegrams, cables and telex (c)	834	1,243
Total	15,942	21,458

(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)	2.3	7.6
May	1.2	0.6
June	1.2	0.6
July	2.9	1.2
August	2.3	0.3
September	52.0	53.5
October	0.6	0.1
November	0.6	0.7
December	7.6	2.5
1969		
January	4.7	7.4
February	2.3	0.8
March	21.1	24.5
April (b)	1.2	0.4
	100	100

(a) From 6 April.

(b) To 5 April.

