

15 Animal and poultry foods

This Report on the Animal and Poultry Foods Industry relates to establishments engaged wholly or mainly in manufacturing or compounding animal and poultry food, bird and pet foods. The production of grain offals is classified to the Grain Milling Industry; the production of oilseed cakes and meals is classified to the Vegetable and Animal Oils and Fats Industry; and the manufacture of animal and poultry medicines, condiments and spices is classified to the Pharmaceutical Chemicals and Preparations Industry.

This industry corresponds to minimum list heading 219 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 corresponds to the Animal and Poultry Foods Industry (Part 15) in the Reports on the last detailed Census of Production for 1963 except that the production of meat and bone meal and sterilised bone flour (other than for use as fertiliser), and medicines, condiments and spices for animals, poultry etc, are now included in the Reports on the Vegetable and Animal Oils and Fats Industry (Part 16) and the Pharmaceutical Chemicals and Preparations Industry (Part 30) respectively.

In this industry a sample of establishments employing fewer than 25 persons were asked to complete a simplified version of the full census form for the 1963 Census, but for 1968 all small establishments were only required to give information on employment and description of business.

The standard classification procedure was modified in 1963 to exclude from this industry seed-crushing and grain milling firms with substantial sales of animal and poultry foods which otherwise would have been classified to this industry. This modification has been discontinued in 1968, and classification of returns to this industry and to sub-divisions of the industry now follows the standard procedure.

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.	565	496	
Number of establishments	"	736	670	
Gross output	£'000	466,416	575,690	
Net output	"	89,413	101,049	
Net output per head	£	2,463	3,141	
Sales and work done	{ goods produced and work done (c) merchanted goods and canteen takings	£'000	378,279	471,564
		"	87,840	103,907
Purchases	{ materials for use in production and packaging and fuel goods for merchandising and canteen purchases	"	287,406	368,419
		"	77,334	95,813
Payments to other organisations	{ for work done on materials given out for transport by road by rail and other means excluding postal services	"	140	52
		"	9,858	9,782
		"		1,880
Stocks and work in progress				
Total stocks and work in progress	{ change during year at end of year	"	- 1,968	+ 1,524
		"	42,232	44,850
Goods on hand for sale	{ change during year at end of year	"	+ 234	+ 83
		"	11,898	12,942
Work in progress	{ change during year at end of year	"	+ 63	+ 136
		"	568	568
Materials, stores and fuel	{ change during year at end of year	"	- 2,265	+ 1,305
		"	29,765	31,341
Number employed on average during the year	{ total, including working proprietors operatives other employees (d)	Th.	36.3	32.2
		"	23.7	20.9
		"	12.0	10.8
Wages and salaries	{ of operatives of other employees (d)	£'000	18,591	22,085
		"	11,551	14,329
Capital expenditure (e)				
Total	"	10,458	9,809	
New building work	"	3,910	1,820	
Land and existing buildings (f)	"	27	- 322	
Plant and machinery (f)	"	5,336	6,463	
Vehicles (f)	"	1,185	1,848	

(a) For 1968, estimates for establishments not making satisfactory returns and for small establishments, from which only employment data were collected, accounted for 16 per cent. of the total figures in which they were incorporated: of this, unsatisfactory returns accounted for 2 per cent. For 1963 the comparable figures were 14 per cent. and 2 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	499	448
Average number employed:		
Working proprietors	474	364
Other persons employed	5,025	4,726

Footnotes continued on page 15/2.

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	101	98	338	..	..	..
6-10	106	99	844	..	..	..
11-24	210	197	3,665	..	..	..
25-49	76	61	2,783	48,928	7,560	2,716
50-99	66	50	4,471	70,802	11,725	2,622
100-199	36	22	4,884	79,795	11,284	2,310
200-299	17	12	3,966	69,171	12,734	3,211
300 and over	18	7	10,546	208,876	40,630	3,853
Unsatisfactory returns	40	38	670	..	..	..
Total	670	496	32,167	575,690(c)	101,049(c)	3,141(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	1,816	923	1,745	1,054	961	1,142
50-99	2,967	1,478	2,794	1,833	942	1,240
100-199	3,101	1,782	3,063	2,057	988	1,155
200-299	2,788	1,170	3,088	1,314	1,108	1,123
300 and over	6,827	3,715	7,822	5,775	1,146	1,554
Unsatisfactory returns	..	..	..	..	..	..
Total	20,894(c)	10,820(c)	22,085(c)	14,329(c)	1,057(c)	1,324(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	2	3
18 and over	78	19	97
All ages	79	21	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 24 establishments in 1968 and 65 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 £1,450,000 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	
		Feeding stuffs for animals, poultry, etc (except dog and cat foods) 01		Dog and cat foods 02		1963	1968
		1963	1968	1963	1968		
Number of enterprises (c)	No.	142	112	8	12	148	121
Number of establishments	"	277	220	15	17	292	237
Gross output	£'000	368,629	430,138	30,721	52,058	399,350	482,196
Net output	"	63,641	68,038	12,916	16,600	76,557	84,638
Net output per head	£	2,295	3,005	3,852	3,861	2,463	3,141
Sales and work done	£'000	293,456	343,978	30,431	51,003	323,887	394,981
Sales of characteristic products	"	260,328	307,519	28,250	48,607	(f)	(f)
Index of specialisation (g)	Per cent.	89	89	93	95	90	91
Purchases	£'000	229,429	276,416	16,651	32,171	246,080	308,587
Payments to other organisations	"	119	44	1	-	120	44
Stocks and work in progress	"	177	224	23	-154	200	70
Goods on hand for sale	"	8,574	9,383	1,613	1,457	10,187	10,840
Work in progress	"	49	59	5	55	54	114
Materials, stores and fuel	"	2,014	1,819	75	-726	-1,939	1,093
Number employed on average during the year	No.	27,730	22,644	3,353	4,299	31,083	26,943
Wages and salaries	£'000	14,413	15,819	1,713	2,883	16,125	18,702
Wages and salaries per head	£	792	1,072	718	982	783	1,057
Capital expenditure (i)	£'000	3,068	1,292	280	233	3,348	1,525
Land and existing buildings	"	86(j)	95	109(j)	40	299	135
Plant and machinery	"	4,061	4,670	592	869	4,653	5,539
Vehicles	"	1,816	2,108	44	144	1,860	2,252

For notes to this table - see page 15/5.

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		
	Th. tons	£'000	Th. tons	£'000	Number	Number
01 Feeding stuffs for animals, poultry, etc, other than dog and cat foods						
Compound feeding stuffs (including molassed feeds containing not less than 30 per cent. molasses)	8,156	268,956	8,371	300,985	124	207
Livestock concentrates and mixtures (including those containing animal feed supplements, eg vitamins, minerals and antibiotics)	313	14,990	705	32,382	53	91
Fish meal (including herring meal)	98.5	5,903	115	7,654	9	12
Bird seeds, prepared and mixed	19.5	2,347	..	2,467	8	9
Other and unclassified feeding stuffs	238	7,075	42.3	1,336	31	56
Total feeding stuffs for animals, poultry, etc, other than dog and cat foods	8,826	299,271	9,233	342,357	..	..
02 Dog and cat foods						
Dog foods, canned	134	15,410	223	30,198	8	11
Cat foods, canned	105	10,527	135	17,490	6	8
Biscuits	50.1	4,442	86.2	8,659	10	15
Other	34.4	2,757(b)	9.4	1,009	16	17
Total dog and cat foods	323	33,135	454	57,356	..	..
Other products	..	529	..	2,750	22	29
Waste products	..	123	..	88	15	22
Work done	..	143	..	121	29	34
Total	..	333,201	..	406,292	..	..
Sales in other industries (see Table 6)	..	40,569	..	45,350	..	..
Principal products of this industry sold by establishments in the industry	..	292,632	..	360,943	121	199(c)

(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 establishment, not merely sales by establishments classified to the sub-division.

(b) Including an amount for unclassified dog foods for 1963.

(c) 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			
	Quantity	Value	Quantity	Value	Entries	Principal industries in which produced (a)
	Th. tons	£'000	Th. tons	£'000	Number	
Compound feeding stuffs (including molassed feeds containing not less than 30 per cent. molasses)	1,038	32,270	934	33,496	41	7,16,36
Other and unclassified feeding stuffs including dog and cat foods	187	8,299	..	11,853	22	7,10,11,33
Total	1,225	40,569		45,350	..	

(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
Sales of goods (other than principal products)	31,031	33,649
Services rendered to other organisations (a)	224	389
Total value of goods sold without having been subjected to any manufacturing process (merchanted or factored)	74,949	86,759
Canteen takings	260	273
Total	106,464	121,070

(a) 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, including production by establishments classified to other industries, 1963 and 1968 (a)

All establishments: United Kingdom

	1963	1968
	Quantity	Quantity
	Th. tons	Th. tons
Compound feeding stuffs (including molassed feeds containing not less than 30 per cent. molasses)		
For cattle	2,740	3,229
For calves	368	373
For pigs	2,040	2,140
For poultry	3,893	4,036
Other sorts	167	197
Total	9,208	9,975

(a) This table, which is derived from Table 221 in the Annual Abstract of Statistics (No.170) for 1970, supplements the information collected in the 1968 Census and should be read in conjunction with Table 5. It refers to periods of 52 weeks for 1963 and 1968.

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 £'000	Quantity	Cost £'000
Materials for use in production				
Cereals, cereal products and cereal by-products				
Wheat				
Home grown	..	15,845	..	21,347
Imported	..	9,416	..	13,370
Barley				
Home grown	..	21,233	..	40,956
Imported	..	5,748	..	1,888
Oats				
Home grown	..	1,835	..	1,655
Imported	..	456	..	664
Maize	..	34,194	..	37,727
Wheat by-products				
Home produced	..	10,377	..	12,356
Imported	..	5,149	..	1,648
Rice	..	12(a)	..	1,910
Other cereals, cereal products and cereal by-products				
Home produced	..	7,352	..	5,016
Imported	..	11,852	..	5,663
Oil seed cake and meal (including extracted meals)				
Home produced	..	9,775	..	8,446
Imported	..	26,349	..	27,398
Molasses	..	3,855	..	4,256
Milk products (including whey and butter milk powder)	..	1,964	..	2,413
Raw meat and meat offal			Th.cwt.	
Raw meat, home produced	..	1,080	158	645
Meat offal, home produced	..		1,047	4,766
Raw meat, imported	..		542	2,876
Meat offal, imported	..	4,122	1,124	6,547
Meat meal, meat and bone meal, bone meal and sterilised bone flour	..	5,113	..	8,292
Raw fish (including offal)	..	4,625	..	5,686
Fish meal (including herring meal)				
Home produced	..		..	5,130
Imported	..	14,052(b)	..	21,541
Urea	..	(c)	..	308
Mineral additives (eg calcium, phosphates)	..		..	5,040
Pharmaceutical additives (eg vitamins, antibiotics and other antibacterials) whether or not compounded with normal additives (eg calcium, phosphates)	..	7,554	..	6,303
	Th.gal.		Th.gal.	
	108	34	104	37
Lubricating oils and greases	Th.cwt.		Th.cwt.	4
	1.1	7	1	4

TABLE 10 (continued)

	1963		1968	
	Quantity	Cost £'000	Quantity	Cost £'000
Materials for use in production (continued)				
Replacement parts for firms' own machinery, plant and vehicles and accessories and consumable tools bought as replacement				
Tyres and other spare parts for firms' own road goods vehicles	..	1,540	..	550
Other	..		..	1,509
All other materials for use in production	..	22,667	..	27,981
Packaging materials				
Paper and board				
Boxes, cartons, drums and canisters (with or without metal ends) of paper and cardboard	..	898	..	649
Fibreboard packing cases	..		..	625
Bags and multiwall paper sacks	..	5,030(d)	..	6,818
Other packaging materials of paper and paper board (including moulded pulp units and labels)	..	574	..	703
Metal				
Cans and boxes	..	5,327	..	8,939
Barrels, kegs and drums	..	29	..	44
Plastics				
Polyethylene film (up to 0.01 inches thick)	..		..	15
Bags and sacks	..	(c)	..	75
Up to 500 gauge	..		..	147
Other	..		..	1,198
All other packaging materials	..	3,864	..	1,198
Fuel and electricity (e)	Th.tons		Th.tons	
Coal	58.3	315	38.7	224
Coke (including screenings) and manufactured fuel	2.9	23	..	13
	Th.gal.		Th.gal.	
Derv fuel and motor spirit for use in road vehicles	4,202	833	3,946	990
Other liquid fuels (including creosote/pitch mixtures etc, and liquefied petroleum gases)	13,254	585	18,153	779
	Th.therms		Th.therms	
Gas	1,178	100	825	62
	Th.kWh		Th.kWh	
Electricity	375,358	2,295	383,836	2,707
All other fuels	..	(c)	..	448
				80
Total cost of materials and fuel		246,080		308,587
Goods purchased for merchanting		65,961		79,955
Canteen purchases		253		297
Total cost of purchases		312,294		388,840

(a) So far as separately recorded for 1963.

(b) May include some purchases of fish waste for 1963.

(c) Not separately recorded for 1963.

(d) Multiwall sacks only were recorded for 1963.

(e) The total quantity of electricity generated in establishments employing 25 or more persons in this industry was 698 Th.kWh in 1963. Owing to the risk of disclosure of information relating to individual firms, details cannot be given for 1968.

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.	2,692	2,447
Transport costs			
Wages and salaries	£'000	2,115	2,632
Derv fuel and motor spirit	"	833	1,116
Tyres and other spare parts for road goods vehicles	"	..	550
Payments to other organisations for transport	{ by road by rail and other means excluding postal services	{ 8,440	{ 8,194
Costs of operating road goods vehicles			1,574
Insurance	"	157	137
Vehicle licences	"	164	324
Depreciation	"	745	945
Payments to other organisations for repairs and maintenance	"	439	558
Total	"	12,893(a)	16,030

(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	335	399
Road goods vehicles	439	558
Plant, machinery and other capital equipment	877	1,005
Insurance, licensing and depreciation of road goods vehicles (b)	1,067	1,405
Rates, excluding water rates	923	1,265
Hire of plant and machinery	103	291
Postage, telephone, telegrams, cables and telex (c)	530	692
Total	4,274	5,615

(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)	1.0	0.3
May	3.0	1.2
June	9.0	4.2
July	3.0	8.2
August	3.5	1.5
September	15.1	11.4
October	1.5	3.2
November	1.0	0.2
December	30.7	40.1
1969		
January	2.5	3.7
February	4.0	5.7
March	24.1	19.4
April (b)	1.5	0.9
	100	100

(a) From 6 April.

(b) To 5 April.

