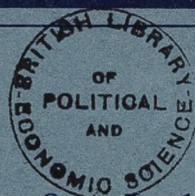


BOARD OF TRADE

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*The Report on the
Census of Production
for 1954*



Volume 8: Industry A

GRAIN MILLING

*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)*

LONDON: HER MAJESTY'S STATIONERY OFFICE

1957

PRICE 1s 9d NET

The Report on the Census of Production for 1954

VOLUME 8, INDUSTRY A

GRAIN MILLING

THIS REPORT on the Grain Milling Industry relates to establishments engaged wholly or mainly in milling wheat (including the production of self-raising and patent flour at milling establishments), in milling, flaking or rolling barley, oats, rye, rice, etc., in splitting or grinding peas, beans, lentils, soya beans, sago, tapioca, in manufacturing ready-to-eat breakfast cereals such as cornflakes or puffed or shredded wheat, or in making peat or peat moss litter.

This industry corresponds to minimum list heading 150 and part of heading 199(3) in the Standard Industrial Classification.

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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 merchanting 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 merchanting 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 1954	Wales 1954
	1948	1951	1954		
	£ million	£ million	£ million	£ million	£ million
Gross output (production)	148.9	227.4	301.5	28.16	11.97
Net output	30.3	33.9	48.8	3.44	1.63
Total stocks and work in progress					
At beginning of year	14.5	19.7	29.8	3.83	1.47
Change during year	- 1.3	+ 5.7	+ 1.6	- 0.44	+ 0.74
Capital expenditure less disposals (a)	1.9	4.5	4.6	0.58	0.04
Wages and salaries	12.2	14.2	16.9	1.55	0.73
Total employment (including working proprietors)	Thousands 36.1	Thousands 35.9	Thousands 35.8	Thousands 3.38	Thousands 1.63

(a) Capital expenditure on new building work, plant, machinery and vehicles (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 1948	United Kingdom	
			1951	1954
FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS				
Number of establishments	No.	338	355	348
Total value of sales and work done	£'000	123,272	201,509	273,829
Products on hand for sale		2,284	3,824	6,820
and work in progress		- 125	+ 1,549	- 590
Gross output (production) (a)		119,950	203,058	273,239
Purchases of materials and fuel		94,618	168,465	224,116
Stocks of materials and fuel		9,383	13,732	20,182
Cost of materials and fuel used		- 910	+ 3,558	+ 2,068
Payment for work done on materials given out		95,528	164,907	222,047
Payment for transport (b)		8	13	13
		3,198	7,863	6,927
Net output		24,414	30,274	44,252
Average number of employees	{ operatives No.	22,538	24,375	24,039
Total employment (d)	{ others	6,543 (c)	7,526	8,273
Net output per person employed (d)		29,124	31,998	32,410
	£	838	946	1,365
Wages and salaries	{ of operatives £'000	6,831	8,874	10,474
	{ of others	2,982	3,815	4,811
Capital expenditure				
New building work (e)		272	1,079	1,208
Plant and machinery	{ acquisitions (e)	1,077	2,457	2,172
	{ disposals	88	64	113
Vehicles	{ acquisitions (e)	352	533	775
	{ disposals	44	82	146
FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS				
Number of returns	No.	943	771 (f)	710
Total employment, including working proprietors		4,225	3,394 (f)	3,187

(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.

Analysis by size, 1954

Larger establishments in the United Kingdom

TABLE 3

Average number employed (a)	Establishments	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(c)	96	9,347	1,328	1,121	336	445	177	99	899
25 - 49	86	21,746	3,178	2,225	687	901	402	292	1,079
50 - 99	71	43,755	6,106	3,575	1,243	1,519	732	478	1,260
100 - 199	51	55,277	8,776	4,979	1,709	2,156	1,006	759	1,310
200 - 299	19	46,049	6,859	3,455	1,286	1,479	736	709	1,446
300 - 399	12	37,839	5,674	3,014	1,057	1,349	616	505	1,394
400 - 499	7	27,627	3,865	2,379	711	1,077	422	301	1,249
500 and over	6	31,598	8,467	3,291	1,244	1,549	720	1,011	1,867
Total	348	273,239	44,252	24,039	8,273	10,474	4,811	4,155	1,365

- (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.
 (c) Including a small number of establishments with fewer than 11 persons employed, particulars of which were included with those for larger establishments on a single return.

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
		Wheat products imported	Wheat products home grown	Oat products	Peat and peatmoss litter		
Number of establishments	No.	157	72	11	19	89	348
Total value of sales and work done	£'000	182,999	23,817	4,448	421	62,144	273,829
Sales of characteristic products	"	155,604	20,448	4,213	421	1,341	6,820
Products on hand for sale	{ at beginning of year	4,646	379	406	47	161	590
and work in progress	{ change during year	570	21	204	2	161	590
Gross output (production)	"	182,428	23,838	4,244	423	62,305	273,239
Purchases of materials and fuel	"	151,179	20,015	2,867	67	49,988	224,116
Stocks of materials	{ at beginning of year	14,735	850	268	30	4,299	20,182
and fuel	{ change during year	1,528	214	69	7	402	2,068
Cost of materials and fuel used	"	149,650	19,801	2,937	74	49,586	222,047
Payment for work done on materials given out	"	6	1	-	-	6	13
Payment for transport	"	4,399	566	307	46	1,609	6,927
Net output	"	28,373	3,471	1,000	303	11,104	44,252
Average number of employees	{ operatives	15,702	2,252	547	406	5,132	24,039
	{ others	5,741	726	240	53	1,589	8,273
Total employment (a)	"	21,458	2,984	787	460	6,721	32,410
Net output per person employed (a)	£	1,322	1,163	1,271	660	1,652	1,365
Wages and salaries	{ of operatives	£'000	6,821	900	211	179	2,364
	{ of others	"	3,311	422	130	32	917
Capital expenditure	"	"	"	"	"	"	"
New building work (b)	"	"	571	72	(c)	(c)	527
Plant and machinery	{ acquisitions (b)	"	1,233	192	69	2	676
	{ disposals	"	88	16	-	1	9
Vehicles	{ acquisitions (b)	"	461	121	(c)	(c)	180
	{ disposals	"	81	21	11	1	32

- (a) Excluding outworkers and including working proprietors.
 (b) Excluding expenditure for establishments not yet in production.
 (c) Owing to the risk of disclosure of information relating to individual firms, separate particulars cannot be given.

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
Wheat products	Th. tons	£'000	Th. tons	£'000	Number
Meal and flour (other than self-raising flour and semolina)					
National flour			2,761.6	104,342	192
Wholemeal, national brown and other flours of higher extraction than national flour	4,501.7	102,590	158.3	6,052	155
Flours of lower extraction than national flour			..	928	
Semolina	34.0	1,376	750.0	29,353	173
Self-raising flour (a)	169.1	5,359	48.4	2,236	44
Breakfast foods, packeted for retail sale	40.3	4,811	183.7	8,762	126
Bran, pollard, sharps and middlings (including weatings and superfine weatings)	870.1	18,721	42.5	6,264	12
Other wheat products and by-products	44.6	1,149	1,053.0	24,088	222
Total wheat products	5,659.8	134,007	77.1	2,144	139
Oat products			5,074.5	183,241	..
Meal and groats			..	928	
Rolled oats and similar products	134.6	7,217	28.3	1,255	28
Crushed and ground oats	29.1	831	55.1	4,120	35
Other oat products and by-products	62.7	1,081	58.7	1,482	224
Unclassified	7.7	387	35.1	376	37
Total oat products	234.0	9,516	..	174	10
Barley products			181.5	7,491	..
Meal	116.1	3,423	..	130	
Barley flour, and pearly, blocked, flaked, puffed and pot barley	41.8	1,764(b)	20.8	706	48
Other barley products and by-products	58.1	1,928(c)	..	130	
Total barley products	216.0	7,115	248.0	7,068	..
Maize products (excluding maize starch) (d)			..	130	
Meal and flour	62.8	1,983	45.8	1,452	174
Breakfast foods, packeted for retail sale and other flaked maize	117.4	8,539	197.3	12,419	76
Other milled products of maize	38.3	1,210	208.2	6,494	158
Unclassified	70.6	2,329	-	-	-
Total maize products	289.2	14,061	451.3	20,364	..
Rice whole (husked or cleaned) and rice products	15.1	1,502	30.0	3,421	20
Rye meal, flour and by-products	7.6	295	4.3	119	20
Soya meal, flour and by-products	3.0	237			
Pea and bean meal and flour	4.5	240	28.8	1,492	39
Other meal, flour and by-products	6.2	203	7.4	321	21
Split lentils	9.1	878	8.9	536	7
Split peas	6.5	477	8.1	620	8

TABLE 5 (contd.)

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
	Th. tons	£'000	Th. tons	£'000	Number
Compound cakes, cubes, meals, etc. (e)					
For cattle	243.8	7,370	254.1	8,164	98
For calves	27.4	906	30.9	1,145	69
For pigs	348.7	10,979	529.5	17,118	137
For poultry	400.2	13,835	550.2	18,703	136
Other sorts	6.0	169	4.0	119	35
Unclassified	7.2	228	..	100	
Other animal and poultry feeding stuffs, not elsewhere specified (e)	44.8	1,513	83.1	2,701	11
Screenings, not included elsewhere	..	165	78.4	3,362	69
Total milled products	..	2	-	-	-
Total milled products	..	203,698	..	277,319	..
Peat and peat moss litter, etc.	71.7	337	72.6	422	15
Milling done by grist millers and others on commission (f)		55		49	47
Other work done on commission (f)		183		104	21
Total		204,273		277,894	..
Sales in other industries (see Table 6)		4,602		5,311	..
Principal products of this industry sold by establishments in the industry		199,671		272,583	308

- (a) For particulars of the output of self-raising flour by firms not engaged in milling see the Miscellaneous Preserved Foods Industry (Volume 9, Industry G).
 (b) Including breakfast foods, packeted for retail sale.
 (c) Including barley meal and flour unclassified.
 (d) For particulars of the output of maize starch see the Starch Industry (Volume 9, Industry E).
 (e) For particulars of the output of compound cakes, cubes, meals, etc., and other animal and poultry feeding stuffs by firms not engaged in grain milling see the Seed Crushing and Oil Refining Industry (Volume 2, Industry P) and the Cattle, Dog and Poultry Foods Industry (Volume 9, Industry C).
 (f) Amount charged.

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	
Wheat products				
Meal and flour including semolina	0.3	20	..	8B, 9E
Breakfast foods, packeted for retail sale	1.6	291	..	9G
Other wheat products and by-products	3.6	30	5	9C
Total wheat products	5.5	340	..	
Oat products				
Oat products and by-products, excluding meal and groats and rolled oats	17.2	478	97	2C, 9C
Barley products				
Meal	41.5	1,134	98	9C
Other barley products and by-products	4.9	168	5	2F, 8H, 9C
Total barley products	46.5	1,303	..	

(59478)

TABLE 6 (contd.)

	1954			Principal industries in which produced (a)
	Quantity	Value	Entries	
	Th. tons	£'000	Number	
Maize products (excluding maize starch)				
Meal and flour	19.1	620	79	9C
Breakfast foods, packeted for retail sale and other flaked maize	34.9	1,311	31	2P, 8H, 9C, 9G
Other maize products and by-products	33.7	1,070	50	8H, 9C
Total maize products	87.7	3,001	..	
Rice and rice products	2.7	175	..	8I, 9G
Pea and bean meal and flour, and other meal, flour and by-products	0.3	14	..	9F
Total		5,311	..	

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

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

TABLE 7

	1954	
	Quantity	Value
	Th.cwt.	£'000
Bread and bread improvers, flour confectionery and farinaceous preparations for use as food	108.9	643
Biscuits and cereal filler (sausage rusk)	13.6	38
Other sales and work done	214.0	440
Total	..	125
Total		1,246

TABLE 8 - Total make of intermediate products

Larger establishments in the United Kingdom

This table is not applicable to the industry

(59478)

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

TABLE 9

	Quantity	Cost
	Th.tons	£'000
Materials		
Wheat		
Home-grown	1,635.0	40,179
Imported	3,575.0	101,790
Oats		
Home-grown	277.5	4,020
Imported	28.6	613
Barley		
Home-grown	212.7	4,806
Imported	414.8	9,657
Maize	593.0	15,949
Rye	10.2	240
Rice	30.6	2,078
Soya beans	42.3	1,922
Peas, beans (other than soya beans) and lentils	34.0	1,415
Wheat flour purchased for blending with millers' own products	142.5	4,513
Wheat offals purchased for further manufacturing or for mixing with millers' own products	65.0	1,440
Mill improvers	2.2	87
Oil seed cake and meal	126.1	4,348
Packing materials	Th.sq.yds.	
Bolting cloth of silk or nylon or other synthetic fibres, and covers made therefrom	18.9	26
	..	9
	Mn.	
Sacks and bags of textile material	34	2,575
	..	811
	Th.cwt.	
Paper sacks	29.7	186
	..	108
Other packing materials	..	5,236
Replacement parts for firms' own machinery, plant and vehicles and consumable tools bought as replacement	..	1,326
All other purchased materials	..	17,291
Fuel and electricity	Th.tons	
Coal	196.2	798
Coke	5.9	32
Liquid fuels (including creosote/pitch mixtures)		
For use in internal combustion engines	Th.gal.	
Motor spirit (petrol) for use in road vehicles and derv. fuel	3,452	661
Other	332	22
	..	5
For burning in furnaces, boilers, kilns, etc.	2,077	93
Gas purchased	Th.therms	
From Gas Boards and other sources	2,074	103
Electricity purchased	Th.kWh.	
From Electricity Boards	366,586	1,761
From other sources, including other departments of the same firms	796	6
All other purchased fuel		10
Total cost		224,116

(59478)

Average number of employees and wages, salaries and superannuation payments (a)
Larger establishments in the United Kingdom

TABLE 10

	1951	1954
	Number	Number
Average number of employees		
Operatives	24,375	24,039
Administrative, technical and clerical employees	7,526	8,273
Total	31,901	32,312
Wages and salaries paid to	£'000	£'000
Operatives	8,874	10,474
Administrative, technical and clerical employees	3,815	4,811
Total	12,689	15,285
Wages and salaries per head	£	£
Operatives	364	436
Administrative, technical and clerical employees	507	582
Superannuation and other pension funds for employees and dependents (b)		£'000
Employers' contributions	..	330
Employees covered	..	Number 27,033
Pension, etc. payments to former employees and dependents (b)	..	£'000 141

(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):-

	1951	1954
	Number	Number
Canteen workers		
Male	16	13
Female	205	223
Total	221	236
Other workers		
Male	746	619
Female	229	151
Total	975	770
Total excluded employees	1,196	1,006

(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	92	5	97	93	5	98
Operatives	21,117	3,286	24,403	20,621	3,244	23,865
Administrative, technical and clerical employees	5,314	2,215	7,529	5,829	2,535	8,364
Total employees	26,431	5,501	31,932	26,450	5,779	32,229

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

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- B. Non-Metalliferous Mines and Quarries (other than Coal, Salt and Slate)
- C. Salt Mines, Brine Pits and Salt Works
- D. Slate Quarries and Mines
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