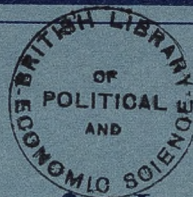


BOARD OF TRADE

S
42
[HA251]

*The Report on the
Census of Production
for 1954*



Volume 2: Industry M

MATCH

*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 6d NET

The Report on the Census of Production for 1954

VOLUME 2, INDUSTRY M

MATCH

THIS REPORT on the Match Industry relates to establishments engaged wholly or mainly in the manufacture of matches and firelighters.

This industry is mainly included in minimum list heading 35(2) in the Standard Industrial Classification, which relates to Polishes, Ink and Matches, but it covers also the establishments engaged in the manufacture of firelighters included in minimum list heading 199(3) relating to miscellaneous manufacturing industries.

LIST OF TABLES

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

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

S
42
[HA 251]

23.4.57

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		
Gross output (production)	£ million 10.6	£ million 15.2	£ million 14.7	£ million 1.27	£ million -
Net output	2.4	2.6	2.8	0.26	-
Total stocks and work in progress					
At beginning of year	1.0	1.3	2.2	0.14	-
Change during year	- 0.1	+ 1.2	- 0.4	- 0.02	-
Capital expenditure less disposals (a)	0.3	0.2	0.2	0.01	-
Wages and salaries	1.1	1.4	1.5	0.13	-
Total employment (including working proprietors)	Thousands 4.6	Thousands 4.8	Thousands 4.2	Thousands 0.38	Thousands -

(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.	37	34	27
Total value of sales and work done	£'000	8,830	12,721	12,557
Products on hand for sale	"	246	297	392
and work in progress	"	21	221	3
Gross output (production) (a)(b)	"	8,759	12,941	12,554
Purchases of materials and fuel	"	1,802	3,772	2,516
Stocks of materials and fuel	"	618	787	1,490
Cost of materials and fuel used	"	101	836	310
Payment for work done on materials	"	1,903	2,936	2,826
Excise Duty (b)	"	4,848	7,630	7,183
Payment for transport (c)	"	92	135	116
Net output	"	2,008	2,240	2,429
Average number of employees	No.	3,318	3,415	3,079
Total employment (e)	"	518(d)	637	532
Net output per person employed (e)	£	3,842	4,059	3,617
Wages and salaries	£'000	523	552	672
Capital expenditure	"	691	876	956
New building work (f)	"	246	317	357
Plant and machinery	"	70	46	17
Plant and machinery	"	164	142	180
Vehicles	"	5	44	47
Vehicles	"	16	38	29
Vehicles	"	3	4	9
FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS				
Number of returns	No.	126	122(g)	106
Total employment, including working proprietors	"	646	613(g)	529

(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) Gross output includes excise duty payable by establishments in the industry. The duty shown is the net amount after deduction of allowances receivable on matches exported and excludes the duty on some matches sold in bond. The total amount of duty paid on matches sold for home consumption in the financial year ended on March 31, 1955, given in the Report of the Commissioners of Customs and Excise for that year was £8,113,000.

(c) 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.

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

(e) Excluding outworkers and including working proprietors.

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

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

MATCH

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	12	159	72	168	34	38	13	7	349
25 - 999	15	12,395	2,357	2,911	498	918	344	218	691
Total	27	12,554	2,429	3,079	532	956	357	226	672

(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.

TABLE 4 - Analysis according to specialisation within the industry, 1954

Larger establishments in the United Kingdom

No specialisation within this industry was distinguished.

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		Entries
	Quantity	Value	Quantity	Value	
	Th.gross boxes of 50 matches (a)	£'000	Th.gross boxes of 50 matches (a)	£'000	Number
Safety matches					
For home consumption	2,452	2,575	3,284	2,914	6
For export	773	298			
Other sorts of matches					
For home consumption	9,197	8,984	9,107	8,857 (b)	7
For export	4	4			
Total matches	12,426	11,861	12,391	11,771 (b)	8
Firelighters	Th.gross 1,351	620	Th.gross 1,254	578	23
	..	129	..	97	
Work done for the trade or on commission		9 (c)		(d)	..
Total		12,619		12,445	
Sales in other industries (see Table 6)		129		117	
Principal products of this industry sold by establishments in the industry		12,490		12,328	25

(a) Equivalent of contents of containers of all sizes.

(b) Includes a small amount of work done for the trade or on commission.

(c) Amount charged.

(d) Owing to the risk of disclosure of information relating to individual firms, separate particulars cannot be given: the amount returned has been included with other sorts of matches.

MATCH

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.gross	£'000	Number	
Safety matches				
For home consumption	12	22	6	2A, 2D, 2E, 2H
Firelighters				
Total		117		

(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
		£'000
Waste timber sold	..	12
Other goods	..	217
Total		229

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.cu.ft.	£'000
Materials		
Timber (excluding timber for packing)		
Splints	272	411
Roundwood	..	84
	514	188
	Tons	
Paper (excluding paper for packing)	1,524	121
	..	14
Cardboard (excluding cardboard for packing)	8,929	399
	Cwt.	
Potassium chlorate	19,374	106
	Tons	
Paraffin wax	1,609	117
	Cwt.	
Glues and other adhesives	14,078	120
Packing materials	..	243
All other purchased materials	..	611
Fuel and electricity	Th.tons	
Coal	11.6	48
Coke	.5	3
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	102	20
Other	83	5
For burning in furnaces, boilers, kilns, etc.	..	5
Gas purchased	Th.therms	
From Gas Boards	56	4
From other sources, including other departments of the same firms	-	-
Electricity purchased	Th.kWh.	
From Electricity Boards	2,366	17
From other sources, including other departments of the same firms	-	-
All other purchased fuel		1
Total Cost		2,516

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	3,415	3,079
Administrative, technical and clerical employees	637	532
Total	4,052	3,611
Wages and salaries paid to	£'000	£'000
Operatives	876	956
Administrative, technical and clerical employees	317	357
Total	1,193	1,313
Wages and salaries per head	£	£
Operatives	257	310
Administrative, technical and clerical employees	498	671
Superannuation and other pension funds for employees and dependents (b)		£'000
Employers' contributions	..	60
Employees covered	..	Number 536
Pension, etc. payments to former employees and dependents (b)	..	£'000 26

(a) Excluded employees. The following persons were employed at the larger establishments in this trade in 1954 but are not included in the above tables or in any other Census of Production report (employees in Great Britain engaged, for example, in merchandising and in Northern Ireland in welfare work):

Canteen workers	7 Males	75 Females
Other workers	48 Males	19 Females

(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
Working proprietors	7	-	7	6	-	6
Operatives	1,305	2,100	3,405	1,189	1,974	3,163
Administrative, technical and clerical employees	427	206	633	345	212	557
Total employees	1,732	2,306	4,038	1,534	2,186	3,720

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

LIST OF INDUSTRY REPORTS

VOLUME 1

- A. Coal Mines
- 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
- E. Metalliferous Mines and Quarries
- F. Brick and Fireclay
- G. China and Earthenware
- H. Glass Containers
- I. Glass (other than Containers)
- J. Cement
- K. Abrasives
- L. Building Materials
- M. Manufactured Fuel

VOLUME 2

- A. Coke Ovens and By-products
- B. Dyes and Dyestuffs
- C. Fertiliser, Disinfectant, Insecticide and Allied Industries
- D. Coal Tar Products
- E. Chemicals (General)
- F. Drugs and Pharmaceutical Preparations
- G. Toilet Preparations and Perfumery
- H. Explosives and Fireworks
- I. Paint and Varnish
- J. Soap, Candles and Glycerine
- K. Polishes
- L. Ink
- M. Match
- N. Mineral Oil Refining
- O. Oils and Greases
- P. Seed Crushing and Oil Refining
- Q. Glue, Gum, Paste and Allied Industries
- R. Plastics Materials

VOLUME 3

- A. Blast Furnaces
- B. Iron and Steel (Melting and Rolling)
- C. Iron Foundries
- D. Steel Sheets
- E. Tinplate
- F. Wrought Iron and Steel Tubes
- G. Non-Ferrous Metals (Smelting, Rolling, etc.)
- H. Scrap Metal Processing
- I. Motor Vehicles and Cycles (Manufacturing)
- J. Motor Vehicles and Cycles (Repairing)
- K. Aircraft Manufacture and Repair
- L. Railway Locomotive Shops and Locomotive Manufacturing
- M. Railway Carriages and Wagons and Trams
- N. Carts, Perambulators, etc.

VOLUME 4

- A. Shipbuilding and Ship Repairing
- B. Marine Engineering
- C. Machine Tools
- D. Textile Machinery and Accessories
- E. Small Arms
- F. Constructional Engineering
- G. Mechanical Handling Equipment

VOLUME 4 (contd.)

- H. Printing and Bookbinding Machinery
- I. Mechanical Engineering (General)
- J. Mechanical Engineering (Repairing)
- K. Electrical Engineering (General)
- L. Electric Wires and Cables
- M. Radio and Telecommunications
- N. Batteries and Accumulators
- O. Electric Lighting Accessories and Fittings

VOLUME 5

- A. Tool and Implement
- B. Cutlery
- C. Chain, Nail, Screw and Miscellaneous Forgings
- D. Wire and Wire Manufactures
- E. Hardware, Hollow-ware, Metal Furniture and Sheet Metal
- F. Brass Manufactures
- G. Needles, Pins, Fish Hooks and Metal Smallwares
- H. Scientific, Surgical and Photographic Instruments, etc.
- I. Watch and Clock
- J. Jewellery and Plate
- K. Precious Metals Refining
- L. Musical Instruments

VOLUME 6

- A. Cotton Spinning and Doubling
- B. Cotton Weaving
- C. Woollen and Worsted
- D. Rayon, Nylon, etc. Production
- E. Rayon, Nylon, etc. Weaving, and Silk
- F. Flax Processing
- G. Linen and Soft Hemp
- H. Jute
- I. Rope, Twine and Net
- J. Hosiery and Other Knitted Goods
- K. Lace
- L. Carpets
- M. Narrow Fabrics
- N. Canvas Goods and Sacks
- O. Textile Converting
- P. Made-up Household Textiles
- Q. Textile Finishing
- R. Textile Packing

VOLUME 7

- A. Asbestos
- B. Flock and Rag
- C. Hair, Fibre and Kindred Industries
- D. Leather (Tanning and Dressing)
- E. Feltmongery
- F. Leather Goods
- G. Fur
- H. Tailoring, Dressmaking, etc.
- I. Hats, Caps and Millinery
- J. Glove
- K. Umbrella and Walking Stick
- L. Boot and Shoe

VOLUME 8

- A. Grain Milling
- B. Bread and Flour Confectionery
- C. Biscuit
- D. Bacon Curing and Sausage

VOLUME 8 (contd.)

- E. Preserved Meat
- F. Milk Products
- G. Ice Cream
- H. Sugar and Glucose
- I. Cocoa, Chocolate and Sugar Confectionery
- J. Preserved Fruit and Vegetables

VOLUME 9

- A. Margarine
- B. Fish Curing
- C. Cattle, Dog and Poultry Foods
- D. Vinegar and Other Condiments
- E. Starch
- F. Ice
- G. Miscellaneous Preserved Foods
- H. Brewing and Malting
- I. Wholesale Bottling
- J. Spirit Distilling
- K. Spirit Rectifying and Compounding
- L. Soft Drinks, British Wines and Cider
- M. Tobacco

VOLUME 10

- A. Timber
- B. Furniture and Upholstery
- C. Soft Furnishings
- D. Shop and Office Fitting
- E. Wooden Containers and Baskets
- F. Paper and Board
- G. Wallpaper
- H. Cardboard Box, Carton and Fibre-board Packing Case
- I. Manufactured Stationery, Paper Bag and Kindred Industries
- J. Newspaper and Periodical Printing and Publishing
- K. Printing and Publishing, Bookbinding, Engraving, etc.

VOLUME 11

- A. Rubber
- B. Linoleum, Leathercloth and Allied Industries
- C. Brushes and Brooms
- D. Toys and Games
- E. Sports Requisites
- F. Miscellaneous Stationers' Goods
- G. Cinematograph Film Production
- H. Cinematograph Film Printing
- I. Plastic Goods and Fancy Articles
- J. Incandescent Mantles

VOLUME 12

- A. Building and Contracting
- B. Local Authorities (Building and Civil Engineering)
- C. Railways (Civil Engineering)
- D. Tramway, Trolley Bus and Omnibus Undertakings (Civil Engineering)
- E. Canal, Dock and Harbour Undertakings (Civil Engineering)
- F. Gas Supply Industry
- G. Electricity Supply Industry
- H. Water Undertakings

Crown copyright reserved

Printed and published by
HER MAJESTY'S STATIONERY OFFICE

To be purchased from
York House, Kingsway, London W.C.2
423 Oxford Street, London W.1
P.O. Box 569, London S.E.1
13A Castle Street, Edinburgh 2
109 St. Mary Street, Cardiff
39 King Street, Manchester 2
Tower Lane, Bristol 1
2 Edmund Street, Birmingham 3
80 Chichester Street, Belfast
or through any bookseller

Printed in Great Britain

S.O. Code No. 51-341-2-13