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The Report on the Census of Production for 1954

Volume 9: Industry L

SOFT DRINKS, BRITISH WINES AND CIDER

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)

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The Report on the Census of Production for 1954

VOLUME 9, INDUSTRY L

SOFT DRINKS, BRITISH WINES AND CIDER

THIS REPORT on the Soft Drinks, British Wines and Cider Industry relates to establishments engaged wholly or mainly in the manufacture of British wines, cider and perry, aerated waters, fruit squashes and cordials, ginger beer, lemonade powder and crystals, and other soft drinks.

This industry corresponds to minimum list heading 168(2) and (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.

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.

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 com-prises 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

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-

The following notes describe terms in general use ing oil, gas and electricity) for all purposes: packing the tables of the report. More detailed explanamaterials, 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).

- .. 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	Wales	
The second conservation of the pressure of	1948	1951	1954	1954	1954
	£ million	£ million	£ million	£ million	£ million
Gross output (production)	37.3	44.3	52.6	3.21	1.66
Net output	16.9	19.8	25.0	1.52	0.87
Total stocks and work in progress At beginning of year Change during year	+ 6.2	+ 9.6	+ 11.0	0.50	0.18
Capital expenditure less disposals (a)	2.4	2.7	2.9	0.15	0.09
Wages and salaries	6.9	8.8	11.0	0.80	0.48
Total employment (including	Thousands	Thousands	Thousands	Thousands	Thousands
working proprietors)	25.7	28.2	29.5	2.52	1.55

(a) Capital expenditure on new building work, and on 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 (a)

Firms employing on average more than 10 persons

TABLE 2(i)

		Unit	Great	United	Kingdom
		onic	Britain 1948	1951	1954
lumber of establishments		No.	527	562	5.56
otal value of sales and work	done	£,000	32,513	40,822	48,474
roducts on hand for sale	fat beginning of year		1,949	2,684	3,246
and work in progress	change during year	••	+ 409	+ 240	+ 102
ross output (production) (b)			32,560	41,062	48,576
urchases of materials and fu	el		15,417	19,695	22,117
Stanks of materials and find	fat beginning of year		2,995	5,818	6.588
stocks of materials and fuel	change during year	••	+ 1.328	+ 967	+ 521
lost of materials and fuel us	ed		14,090	18,728	21,596
ayment for work done on mate	rials given out		22	15	10
Payment for transport (c)			361	1.073	1,007
ustoms and Excise duties pai	d (net)	.,	3,716	3,036	2,991
et output			14,733	18,210	22,972
warner auchar of analysis	foperatives	No.	16,335	19,826	20,592
verage number of employees	others		4,033(d)	4,899	5,601
otal employment (e)			20,517	24,894	26,329
et output per person employe	d (e)	£	718	731	872
ages and salaries	fof operatives	£,000	3,758	5,329	6,755
uges and salaries	lof others		1,763	2,435	3,079
apital expenditure					20 Sept 87 50
New building work (f)			307	316	570
Plant and machinery	facquisitions (f)		1,206	1,523	1,288
- zun c und muchinery	Ldisposals		49	74	87
Vehicles	facquisitions (f)		482	577	814
Venicles	disposals		55	72	99

(a) For small firms' summary see Table 2 (ii).

(b) 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.

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.

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fewer persons.

Firms in Great Britain employing ten or fewer persons (a)

TABLE 2(ii)

	Unit	1948	1951	1954
Number of returns	No.	582	519	425
Gross output (sales)	£'000	3,740	2,825	2,875
Purchases of materials and fuel		1,819	1,293	1,303
Customs and Excise duties paid (net)		162	115	127
Net output (b)		1,759	1,416	1,445
Total employment (c)	No.	3,531	2,960	2,343
Males		2,573	2,134	1,666
Females		958	826	677
Net output per person employed	£	498	478	617

(a) In 1954 there were 13 small firms in Northern Ireland employing 87 persons (74 males and 13 females).
(b) The value of net output in this section is the difference between the value of gross output (sales) and the cost of materials and fuel purchased during the year less Customs and Excise duties.

(c) Including working proprietors.

Analysis by size, 1954 Larger establishments in the United Kingdom

TABLE 3

Average number	Estab-	Gross	Net	Employees		Wages and salaries		Capital	Net output per person
employed (a)		output	output	Operatives	Others	Operatives		expenditure (b)	employed (a)
	Number	£' 000	£' 000	Number	Number	£'000	£. 000	£,000	£
11 - 24 (c)	247	4,651	2,273	3,141	720	920	337	304	576
25 - 49	174	8,405	4,084	4.947	1,100	1.467	553	373	671
50 - 99	89	9,644	4.765	5.197	964	1,640	584	541	773
100 - 199	31	8,833	4,105	3,238	1,229	1,205	649	633	918
200 - 299	9	4,902	2,154	1,632	610	621	345	305	961
300 - 999	6	12,142	5,591	2,437	978	902	611	517	1,637
Total	556	48,576	22,972	20,592	5,601	6,755	3.079	2,672	872

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

SOFT DRINKS, BRITISH WINES AND CIDER

Analysis according to specialisation within the industry, 1954

Larger establishments in the United Kingdom

TABLE 4

		Specia	list producers	of],	
Tarting and and article con	Unit	Soft drinks including fruit juices	Alcoholic cider and perry	British Wines	Remainder of the industry	Total
Number of establishments Total value of sales and work done Sales of characteristic products	£.000	513 35,374 33,918	22 4,006 3,566	12 6.726 5.838	2,368	556 48,474
Products on hand for sale and work in progress (change during year Gross output (production)	ır	+ 1.075 73 35.447	839 + 41 4.047	1,193 - 28 6,698	+ 16 2,384	3.246 + 102 48.576
Purchases of materials and fuel Stocks of materials (at beginning of year)		17.639 4.736	1,713	1.654 773	1,111	22.117
and fuel change during year Cost of materials and fuel used		+ 698 16,941	- 45 1,758	- 76 1.730	- 56 1,167	+, 521 21,596
Payment for work done on materials given out Payment for transport Customs and Excise duties paid (net)		3 570 - 35(a)	182 1	167 2.719	88	1,007 2,991
Net output		17.968	2.103	2.077	824	22,972
Average number of foperatives employees others	No.	17.725 4,530	1,494	8 50 28 7	523 253	20,592
Total employment (b) Net output per person employed (b)	£	22,388	2,028	1.137	776 1,061	26,329 872
Wages and salaries (of operatives of others	£,000	5,660 2,418	605 330	294 177	196 154	6,755
Capital expenditure				des Sales	0.000	68 (E)
New building work (c) Plant and machinery (acquisitions (c)		1,031	48 162	24 54	3 41	570 1,288
Vehicles (disposals	.:	52 693	22 62	7 29	6 30	87 814
Venicles {disposals	"	73	11	6	10	99

(a) Customs and Excise drawbacks exceeded the duties paid in the year.
(b) Excluding outworkers and including working proprietors.
(c) Excluding expenditure for establishments not yet in production.

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 (a)

TABLE 5 (i)

100 300 300 300 300 300 300 300 300 300	198	51	1954			
Edition Report Control of the Section 1	Quan ti ty	Value	Quan ti ty	Value	Entries	
Soft drinks	Th.gal.	£,000	Th.gal.	£,000	Number	
Concentrated						
In liquid form (including squashes and			10000 220000 1			
cordials and unsweetened concentrated drinks)	13,965	8,656	19,239	11,805	462	
	Th.cwt.		Th.cwt.			
In solid or powder form	74	727	51	58.5	49	
Unclassified		396	-	•	-	
Unconcentrated	Th.gal.		Th.gal.			
Soda water	4,185	699	3,955	772	408	
Other						
Non-alcoholic wines	377	178	947	157	84	
Sweetened, including non-alcoholic cider, not elsewhere specified	116,748	18,724	117,682	22,052	512	
Unclassified	2,730	609	2,759	552	46	
ruit juices						
Concentrated	665	459 122	1,773	1,191	3 25	
Unconcentrated	1,178	1,162	5,637	2.840 562	99	
Alcoholic cider and perry	18,991	3,738	19,123	4,278	23	

(86248)

TABLE 5(i) (contd.)

	195	51	1954		
The state of the s	Quantity	Value	Quanti ty	Value	Entries
	Th.cwt.	£,000	Th.cwt.	£,000	Number
Apple pectin	418	700	342	462	8
Apple pomace		1(b)	•	o premindralia to the	-
British Wines (Sweets)					20 20
Delivered for home consumption	Th.gal.	and the p	Th.gal.	the 192 empt	
Still	4.202	5,429	4,269	5.262	9
Sparkling	148	582	147	582	
For export	h	/	88	29	
Other (sold duty free)	282	127 {	280	103	
Waste products		84	the Alexandra	41	67
Work done for the trade or on commission (c)		38	12.20• • 92.00	115	15
Total		42,432		51,626	6.0.0
Sales in other industries (see Table 6)	100 Mg	3,921		5,807	
Principal products of this industry sold by establishments in the industry	75 (2) (1) (1) (1) (1) (1) (1) (1) (1) (1) (1	38,511		45,819	485

(a) For output of small firms see Table 5 (ii).
(b) So far as recorded separately.
(c) Amount charged.

Total sales by small firms in Great Britain (a)

	195	51	1954			
	Quanti ty	Value	Quanti ty	Value	Entries	
A CONTRACTOR OF THE PROPERTY O	Th.gal.	£,000	Th.gal.	£.000	Number	
Soft drinks						
Soda water	591	90	484	76	285	
Other soft drinks	13,049	2,213	12,416	2.098	388	
Alcoholic cider and perry	837	137	630	117	33	
Liquors purchased and bottled	42	29	17	11	5	
Beer (including ale, stout, porter, etc.)	•••	5				
Other	45	23	15	12	22	
Vinegar (including diluted acetic acid)	308	52	336	55	159	
All other products	1	266		480	65	
Work done for the trade or on commission (b)		9		25	18	
Total		2,825	11L.1	2,875	425	

(a) Small firms in Great Britain (employing on the average ten or fewer persons) that made satisfactory

returns.
(b) Amount charged.

Sales of principal products of the industry by establishments classified to other industries TABLE 6 Larger establishments in the United Kingdom

		1954		Principal
The state of the s	Quantity	Value	Entries	industries in which produced (a)
Soft drinks	Th.gal.	£.000	Number	algua
Concentrated				21 12 1 14 2 1
In liquid form (including squashes and cordials and unsweetened concentrated drinks)	2.469	1,384	105	2E, 8J, 9F, 9I
	Th.cwt.	aslyss chileso		45774 956 4457
In solid or powder form	43	476	40	2F, 8I, 8J, 9D
Unconcentrated	Th.gal.			
Soda water	501	93	105	9H. 9I
Other				A STATE OF THE STA
Sweetened, including non-alcoholic cider, not elsewhere specified	5,505	942	86	91
Unclassified	2,759	552	46	9Н
Fruit juices, and alcoholic cider and perry	3,838	933 540	61	2E, 2F, 8F, 9H
British Wines (Sweets)		28		9G, 9K
Total		5,807	••	The mazon behavior

(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 (a) TABLE 7

	1954	
	Quantity	Value
	Th.gal.	£.000
Flavouring compounds	595	376
Flavouring essences for food and beverages		325
Liquors purchased and bottled		
Beer (including ale, stout, porter, etc.)	178	123
British Wines (Sweets)	144	246
Alcoholic cider and perry	320	85
Other		880
Vinegar and other condiments (including diluted acetic acid)		
Vinegar and other condiments (including dillion documents)	512	83
Made	••	14
Purchased and bottled	202	54
	Th.cwt.	
	47	284
Preserved fruit and vegetables	4	20
Miscellaneous preserved foods	The State of the Area areas	79
Other foodstuffs		53
Other goods	••	34
Total	The state of the s	2,655

(a) For output of small firms see Table 5 (ii).

TABLE 8 - Total make of intermediate products Larger establishments in the United Kingdom This table is not applicable to the industry.

From Electricity Boards

All other purchased fuel

Total cost

160

22,117

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

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aterials	Th.cwt.	£,000
Fresh fruit		120
Apples	to a labour time andronen wat	78.1043 Like - 11 area 1 1 1 1 1 1
Cider varieties	841	433
Other varieties including cooking apples	396	120
Other fresh fruit (excluding rhubarb)	414	512
Fruit pulp (including apple pomace)	44	68
Fruit juices	Th.gal.	7670
Home produced		
Concentrated apple juice	134	45
Other sorts	{ 56	41 371
Imported	The same same same	3/1
Citrus fruit juice	5,330	1,678
	323	157
Grape juice or must	Ч	99
Other sorts	3.021	1.150
British Wines (Sweets) other than for bottling	61 03 0 200	20
	Th.cwt.	2 000
Sugar	Th.1b.	3,286
Saccharin	119	567
Successful III	Th.cwt.	007
Citric, tartaric and phosphoric acids	34	354
Flavouring essences		1,228
Flavouring compounds		790
Carbon dioxide	87	159
Solidified	4	49
Other	77	144
Liquors purchased for bottling	Th.gal.	
Beer (including ale, stout, porter, etc.)	175	92
Wine, imported	366	321
British Wines (Sweets)		
Cider and perry	685	135 17
Other sorts		218
Packing materials	Th.gross	
Bottles and syphons	1,220	2,307
	9	448
	Th.cwt.	529
Cardboard boxes, cartons and fibreboard packing cases	4	201
	Th.cu.ft.	and are been
Packing cases (wood or mainly of wood)	f timber 287	218
	Ψ	231
Other packing materials	TENE SOUND CON NOVET SIEM	1,565
Replacement parts for machinery, plant and vehicles and consumable tools bought as replacement		1,115
All other purchased materials		1,887
el and electricity	Th.tons	
Coal	40	183
Coke	14	78

Quantity Cost Fuel and electricity (contd.) Th.gal. £,000 Liquid fuel (including creosote/pitch mixtures) For use in internal combustion engines Motor spirit (petrol) for use in road vehicles and derv. fuel 5,128 992 26 For burning in furnaces, boilers, kilns, etc. 1,410 59 Gas purchased Th. therms 877 From Gas Boards From other sources, including other departments of the Electricity purchased (b) Th.kWh.

21,344

267

From other sources, including other departments of the same firms

Average number of employees and wages, salaries and superannuation payments (a)

Larger establishments in the United Kingdom TABLE 10

TABLE 10		
	1951	1954
	Number	Number
Average number of employees		
Operatives	19.826	20,592
Administrative, technical and clerical employees	4,899	5,601
Total	24,725	26,193
Wages and salaries paid to	£.000	£,000
Operatives	5,329	6.755
Administrative, technical and clerical employees	2,435	3,079
Total	7,764	9,834
Wages and salaries per head	£	3
Operatives	269	328
Administrative, technical and clerical employees	497	550
Superannuation and other pension funds for employees and dependents (b)		€,000
Employers' contributions		166
		Number
Employees covered		4,637
Pension, etc. payments to former employees and		£,000
dependents (b)		53

(a) The following persons, not included above, were also employed by larger establishments in this industry ('other workers' include, for example, employees engaged in merchanting). There were no outworkers.

	1951	1954
Canteen workers Male Female	2 137	2 141
Total	139	143
Other workers Male Female	539 81	46 2 100
Total	620	562
Total excluded employees	759	705

⁽b) The figures given relate to larger establishments in Great Britain only.

(86248)

⁽a) For materials and fuel purchased by small firms see Table 2(ii).
(b) The total quantity of electricity generated in firms' own establishments in this industry was 1,843 Th.kWh.

SOFT DRINKS, BRITISH WINES AND CIDER

Employment in a specified week (a)

Larger establishments in the United Kingdom

TABLE :	1	1
---------	---	---

	1951			1954		
1.12	Males	Females	Total	Males	Females	Total
Working proprietors	156	13	169	122	14	136
Operatives	12.644	7,564	20,208	13,014	7,132	20,146
Administrative, technical and clerical employees	3,189	1,757	4,946	3,614	2,135	5,749
Total employees.	15,833	9,321	25,154	16,628	9,267	25,895

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

VOLUME 1

- A. Cogl 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
- 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
- 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

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