

BOARD OF TRADE

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[HA 251]

*The Report on the
Census of Production
for 1954*

Volume 1: Industry G

CHINA AND EARTHENWARE

*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 1 INDUSTRY G

CHINA AND EARTHENWARE

THIS REPORT on the China and Earthenware Industry relates to establishments engaged wholly or mainly in the manufacture of earthenware insulators and electrical fittings, chinaware and domestic pottery, earthenware jars, china ornaments, glazed tiles, sanitary ware, etc.

This industry corresponds to minimum list heading 21 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 (a)
	1948	1951	1954		
	£ million	£ million	£ million	£ million	£ million
Gross output (production)	40.3	52.5	56.6	0.90	..
Net output	28.0	34.2	37.4	0.56	..
Total stocks and work in progress					
At beginning of year	4.0	5.9	7.2	0.15	..
Change during year	+ 0.6	+ 1.4	+ 0.4	- 0.01	..
Capital expenditure less disposals (b)	2.9	3.4	1.9	0.04	..
Wages and salaries	17.2	21.9	25.0	0.36	..
	Thousands	Thousands	Thousands	Thousands	Thousands
Total employment (including working proprietors)	68.0	73.4	71.4	0.88	..

(a) Owing to the risk of disclosure of information relating to individual firms, particulars for Wales cannot be given separately.

(b) 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	United Kingdom	
		1948	1951	1954
FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS				
Number of establishments	No.	333	342	331
Total value of sales and work done	£'000	39,260	51,275	55,618
Products on hand for sale	"	2,316	3,757	4,660
and work in progress	"	+ 451	+ 730	+ 361
Gross output (production) (a)	"	39,205	52,005	55,979
Purchases of materials and fuel	"	12,096	17,601	17,753
Stocks of materials and fuel	"	1,609	2,063	2,485
Cost of materials and fuel used	"	+ 134	+ 646	+ 7
Payment for work done on materials given out	"	11,961	16,954	17,746
Payment for transport (b)	"	28	40	53
Net output	"	506	1,126	1,214
Average number of employees	No.	27,215	33,884	36,966
Total employment (d)	"	60,612	66,444	63,545
Net output per person employed (d)	£	5,499(c)	6,247	7,048
Wages and salaries	£'000	66,160	72,735	70,627
Capital expenditure	"	411	466	523
New building work (e)	"	14,160	18,255	20,715
Plant and machinery	"	2,595	3,429	3,991
Vehicles	"	955	1,139	686
	"	1,747	2,015	1,082
	"	37	28	36
	"	142	233	251
	"	25	39	80
FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS				
Number of returns	No.	199	84(f)	114
Total employment, including working proprietors	"	1,190	510(f)	643

(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.

TABLE 3

Analysis by size, 1954: Larger establishments in the United Kingdom

Average number employed (a)	Estab-lish-ments	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)	46	1,021	476	644	96	231	54	64	643
25 - 49	34	1,397	666	1,040	135	342	71	72	565
50 - 99	52	2,710	1,706	3,174	329	1,045	197	81	487
100 - 199	70	7,842	5,183	9,508	827	3,089	469	188	501
200 - 299	50	10,122	6,657	11,272	1,105	3,783	647	302	538
300 - 399	27	6,579	4,621	8,634	770	2,700	462	266	491
400 - 499	23	8,640	5,679	8,983	1,064	3,094	589	386	565
500 - 749	18	7,985	5,342	9,840	1,088	2,971	603	243	489
750 - 999	5	4,158	2,604	3,625	624	1,259	341	152	613
1,000 and over	6	5,525	4,031	6,825	1,010	2,202	558	264	514
Total	331	55,979	36,966	63,545	7,048	20,715	3,991	2,019	523

(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
		Glazed tiles (not of brick earth)	Sanitary earthenware (including vitreous ware)	Domestic and ornamental ware, etc. (a)	Electrical ware	Other earthenware and stoneware		
Number of establishments	No.	44	23	137	21	77	29	331
Total value of sales and work done	£'000	10,143	6,012	20,273	4,880	12,067	2,242	55,618
Sales of characteristic products	"	9,850	5,477	19,469	4,677	11,078		
Products on hand for sale and change during year	"	657	487	1,907	486	1,014	110	4,660
Gross output (production)	"	10,158	5,955	20,568	4,876	12,183	2,238	55,979
Purchases of materials and fuel	"	3,913	1,883	5,818	1,362	3,685	1,092	17,753
Stocks of materials and fuel	"	382	246	1,001	302	409	145	2,485
Cost of materials and fuel used	"	3,901	1,872	5,844	1,344	3,672	1,114	17,746
Payment for work done on materials given out	"							53
Payment for transport	"							1,214
Net output	"	5,902	3,884	14,414	3,418	8,329	1,018	36,966
Average number of employees	No.	8,553	3,831	28,081	5,202	16,727	1,151	63,545
Total employment (c)	"	1,133	635	2,848	748	1,519	165	7,048
Net output per person employed (c)	£	609	870	466	574	456	772	523
Wages and salaries	£'000	2,992	1,735	8,622	1,773	5,161	433	20,715
Capital expenditure	"	670	372	1,563	434	842	110	3,991
New building work (d)	"	100	84	256	58	173	14	686
Plant and machinery	"	256	65	396	125	199	41	1,082
Disposals	"	8	2	17	3	5	1	36
Vehicles	"	41	30	104	20	39	17	251
Disposals	"	12	8	42	4	10	5	80

(a) Including china and porcelain of all kinds other than electrical.

(b) Owing to the risk of disclosure of information relating to individual firms, separate particulars cannot be given.

(c) Excluding outworkers and including working proprietors.

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

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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
	Th.sq. yds.	Th. cwt.	£'000	Th.sq. yds.	Th. cwt.	£'000	
Tiles							
For tessellated pavements	523	221	414	322	115	309	5
	78	..	64	36	..	41	
Glazed wall and hearth tiles							
Flat, rectangular tiles, not figured or embossed							
White	2,737	536	1,665	1,771	327	971	12
	1,055	..	702	1,391	..	933	
Coloured (including ivory, cream and mottled)	3,082	847	3,540	2,754	686	2,945	36
	771	..	876	1,786	..	2,200	
Other glazed tiles							
White	72	28	118	105	26	110	..
Coloured (including ivory, cream and mottled)	338	141	830	592	190	1,072	17
	275	..	358	327	..	493	
Other tiles	341	13	82	607	8	86	11
	382	..	56	..	..	30	
	..	2	18	708	..	101	29
Sanitary ware							
Of earthenware, white, coloured or cane and white (including vitreous ware but excluding drain pipes, angles, bends, elbows and traps)							
Lavatory basins	837	213	1,232	827	203	1,378	20
	446	..	639	343	..	743	
W.C. pans	947	233	1,296	984	269	1,584	20
	333	..	456	392	..	536	
Other	..	82	480	272	101	537	20
	..	..	637	129	..	219	
							537
							38
China, including translucent pottery known as china or porcelain, other than electrical ware							
Porcelain for laboratory use	Th.cwt.			Th.cwt.			
	2		84	..		65	..
Porcelain for industrial purposes	2		24	3		15	5
	..		43	..		102	
Domestic and ornamental	Th.do. of 12			Th.do. of 12			
Bone china	6,989	7,743		6,181	8,236		54
Other translucent pottery	..	168		90	221		7
Other china	Th.cwt.			Th.cwt.			
Electrical ware (including insulators) of porcelain, earthenware or stoneware	455	4,718		324	3,340		28
	..	981		..	1,963		
Earthenware (other than electrical ware)	Th.			Th.			
Domestic and ornamental	6,507	692		4,694	480		10
Jet, Rockingham and Samian ware	..	..		..	80		
Other descriptions	441,768	18,902 (a)		261,559	16,247		137
Earthenware of all other descriptions	4,313		

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TABLE 5 (contd.)

	1951		1954		Entries Number
	Quantity Th.cwt.	Value £'000	Quantity Th.cwt.	Value £'000	
Redware and terra-cotta ware, glazed and unglazed; and fireproof non-vitrified cooking utensils (b)					
Domestic and ornamental	..	151	38	136	10
Other (excluding unglazed flowerpots)	..		..	49	
Stoneware, brown and yellow ware (other than electrical ware)			136	95	14
Domestic and ornamental	294	1,140	126	527	13
Other	..	449	..	372	
	Th.gross		Th.gross		
Domestic and ornamental	..		68	276	11
Other	..		..	310	
Clay tobacco pipes (c)	11	11	5	5	..
	..	29	..	..
	Th.doz.of		Th.doz.of		
Domestic and ornamental china and earthenware purchased and decorated	12		12		
Products used in the making of pottery	178	189	768	500	14
Stilts, spurs, thimbles and saggars, sold separately	..	338	..	231	13
Other descriptions	263	320	49	377	17
	..	127	..	242	
	Th.tons		Th.tons		
Quarry products, e.g., stone, felspar, flint and clay, sold as such	158	944	159	1,219	38
Ground and unground	..		..	194	
Tiled hearths and fireplace surrounds (d)	..	1,450	..	1,516	34
Slabbed work and other tile and mosaic work	..	12	..	28	43
Waste products	..	42	..	77	12
Work done for the trade or on commission (e)					
Total		52,022		56,471	..
Sales in other industries (see Table 6)		1,257		1,411	..
Principal products of this industry sold by establishments in the industry		50,765		55,060	303

(a) Recorded as:

	Th.doz. of 12	£'000
Decorated (including plain coloured)	15,526	11,843
Not decorated	21,288	7,059

(b) For architectural terra-cotta ware, glazed and unglazed, chimney pots and unglazed flower pots, see the Brick and Fireclay Industry (Volume 1, Industry F).

(c) So far as separately recorded.

(d) By larger establishments that made the tiles etc. used in the work. For slabbed work made by other larger establishments see the Building Materials Industry (Volume 1, Industry L).

(e) 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.sq. yds.	Th.cwt.	£'000	Number
Tiles				
Glazed wall, hearth and other tiles (but excluding tiles for tessellated pavements)	3 78	4 ..	5 137	6 1F, 12A
Earthenware cisterns; porcelain for laboratory and industrial purposes (excluding electrical ware); and earthenware other than electrical, domestic and ornamental	Th.cwt.			
Electrical ware (including insulators) of porcelain, earthenware or stoneware	3 ..	15 30	..	1F, 5E
Redware and terra-cotta ware (other than unglazed flowerpots, domestic and ornamental ware); and stoneware, brown and yellow ware (other than electrical ware)	11 ..	284 144	6	1F, 3I, 4K, 4M
Quarry products (e.g., stone, felspar, flint and clay, sold as such)	175	131	16	1F
Ground and unground	Th.tons			
Tiled hearths and fireplace surrounds	22 ..	477 76	8	2E
Products used in the making of pottery	..	110(b)	..	1F, 2E, 12A
Total		1,411	..	

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

(b) Owing to the risk of disclosure of information relating to individual firms, separate particulars cannot be given.

Sales in the industry of other than principal products

Larger establishments in the United Kingdom

TABLE 7

	1954	
	Quantity Th.cwt.	Value £'000
Drainpipes, angles, bends, elbows, and traps (except pre-cast concrete); other sanitary ware of fireclay, glazed or enamelled; unglazed flowerpots	193	179
Ceramic glazes	31 ..	108 113
Flooring quarries and street paving tiles (other than of pre-cast concrete); building bricks; and architectural terra-cotta and faience, glazed or unglazed (excluding fixing charges)	..	119
Other goods	..	39(b)
Work done (a)		
Total		558

(a) Amount charged.

(b) Owing to the risk of disclosure of information relating to individual firms, separate particulars cannot be given.

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. tons	£'000
Materials		
China clay	91	667
Ball clay	111	562
China and Cornish stone and felspar	60	547
Other clays, including marls	..	77
Flint	168	409
Plaster	130	784
Glaze or materials for glaze	..	217
Bone, including bone ash	20	134
Prepared bodies	22	1,593
	..	197
	11	503
	..	60
	27	258
	Th.cwt.	
Colours or materials for colours	9	214
Gold or liquid gold	..	83
	..	593
	Th. sheets	
Lithos	3,156	619
Packing materials	..	67
	Th.cu.ft.	
Packing cases (wood or mainly of wood)	28,721	194
	..	74
	Th.	
Wooden barrels, hogs-heads, casks and kegs	1,167	114
	..	42
	Th.cwt.	
Cardboard boxes, cartons and fibreboard packing cases	42	166
All other packing materials, including wickerwork and steel-mesh crates	..	217
Replacement parts for firms' machinery, plant and vehicles and consumable tools bought as replacement	..	490
All other purchased materials	..	1,223
	..	2,857
Fuel and electricity	Th.tons	
Coal	583	2,147
Coke	55	265
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	477	97
Other	47	5
For burning in furnaces, boilers, kilns, etc.	4,477	195
Gas purchased (a)	Th.therms	
From Gas Boards	31,809	964
From other sources, including other departments of the same firms	..	223
	-	-
Electricity purchased (b)	Th.kWh.	
From Electricity Boards	231,305	882
From other sources, including other departments of the same firms	..	1
All other purchased fuel		11
Total cost		17,753

(a) The total quantity of gas produced amounted to 6,956 Th.therms.

(b) The total quantity of electricity generated in firms' own establishments in this industry in 1954 was 4,741 Th.kWh.

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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	66,444	63,545
Operatives	6,247	7,048
Administrative, technical and clerical employees		
Total	72,691	70,593
	£'000	£'000
Wages and salaries paid to		
Operatives	18,255	20,715
Administrative, technical and clerical employees	3,429	3,991
Total	21,683	24,706
	£	£
Wages and salaries per head		
Operatives	275	326
Administrative, technical and clerical employees	549	566
		£'000
Superannuation and other pension funds for employees and dependents (b)		
Employers' contributions	..	168
		Number
Employees covered	..	14,597
		£'000
Pension, etc. payments to former employees and dependents (b)	..	48

(a) The following persons, not included above, were also employed by larger establishments in this industry ('other workers' includes, for example, employees engaged in merchanting). Payments to outworkers are also shown:

	1951	1954
	Number	Number
Canteen workers		
Males	12	7
Females	458	358
Total	470	365
Other workers		
Males	10	57
Females	6	39
Total	16	96
Total excluded employees	486	461
Outworkers	121	137
	£'000	£'000
Payments to outworkers	9	19

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

Employment in a specified week (a)

Larger establishments in the United Kingdom

	1951			1954		
	Males	Females	Total	Males	Females	Total
Working proprietors	42	2	44	34	-	34
Operatives	27,909	39,578	67,487	26,142	37,917	64,059
Administrative, technical and clerical employees	3,927	2,387	6,314	4,269	2,872	7,141
Total employees	31,836	41,965	73,801	30,411	40,789	71,200

(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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