

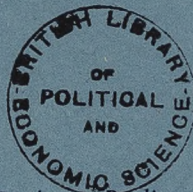
BOARD OF TRADE

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*The Report on the
Census of Production
for 1954*

Volume 2: Industry B

DYES AND DYESTUFFS



*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 2 INDUSTRY B

DYES AND DYESTUFFS

THIS REPORT on the Dyes and Dyestuffs Industry relates to establishments engaged wholly or mainly in the manufacture of dyestuffs and dye intermediates, aniline dyes, coal-tar dyes, vegetable dyes, and tanning extracts.

This industry corresponds to minimum list heading 31(1) in the Standard Industrial Classification, excluding confectioner's colours.

There were no larger establishments in Northern Ireland in the register for this industry.

LIST OF TABLES

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

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 merchandising 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 merchandising 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 (a)	Wales 1954
	1948	1951	1954		
Gross output (production)	£ million 38.3	£ million 56.3	£ million 60.2	£ million ..	£ million -
Net output	17.8	24.0	25.1	..	-
Total stocks and work in progress					
At beginning of year	8.9	11.8	14.5	..	-
Change during year	+ 1.3	+ 4.4	+ 1.2	..	-
Capital expenditure less disposals (b)	2.2	4.6	2.1	..	-
Wages and salaries	7.4	10.5	12.3	..	-
Total employment (including working proprietors)	Thousands 17.4	Thousands 20.8	Thousands 19.8	Thousands ..	Thousands -

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

(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 1948	United Kingdom	
			1951	1954
FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS				
Number of establishments	No.	39	36	34
Total value of sales and work done	£'000	37,316	53,660	58,881
Products on hand for sale	"	5,516	7,384	9,773
and work in progress	"	+ 955	+ 2,283	+ 1,021
Gross output (production) (a)	"	38,028	55,942	59,902
Purchases of materials and fuel	"	20,300	33,168	34,205
Customs and Excise drawback in respect of goods exported	"	2	2	3
Stocks of materials and fuel	"	3,281	4,376	4,675
Cost of materials and fuel used	"	+ 358	+ 2,094	+ 193
Payment for work done on materials given out	"	19,941	31,073	34,012
Payment for transport (b)	"	364	129	900
Net output	"	242	910	
Average number of employees	No.	17,725	23,832	24,993
Total employment	"	11,102	12,987	12,270
Net output per person employed	"	6,159 (c)	7,716	7,395
Wages and salaries	£	17,263	20,703	19,665
Capital expenditure	£	1,027	1,151	1,271
New building work (d)	£'000	4,166	5,727	6,434
Plant and machinery	"	3,200	4,702	5,754
Vehicles	"	552	880	480
acquisitions (d)	"	1,634	3,675	1,580
disposals	"	6	15	41
acquisitions (d)	"	62	74	92
disposals	"	8	20	63
FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS				
Number of returns	No.	19	22 (e)	20
Total employment, including working proprietors	"	103	124 (e)	107

(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 expenditure for establishments not yet in production.

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

DYES AND DYESTUFFS
Analysis by size, 1954

Larger establishments in the United Kingdom

TABLE 3

Average number employed	Estab-lish-ments	Gross output	Net output	Employees		Wages and salaries		Capital expenditure (a)	Net output per person employed
				Operatives	Others	Operatives	Others		
	Number	£'000	£'000	Number	Number	£'000	£'000	£'000	£
11 - 24	8	743	251	83	79	37	59	10	1,546
25 - 49	5	537	146	94	64	38	34	14	927
50 - 99	4	1,427	318	207	97	99	65	17	1,045
100 - 299	8	4,565	1,537	830	393	351	261	108	1,257
300 and over	9	52,632	22,742	11,056	6,762	5,910	5,335	2,003	1,276
Total	34	59,902	24,993	12,270	7,395	6,434	5,754	2,152	1,271

(a) Capital expenditure on new building work and on acquisition of plant, machinery and vehicles, excluding expenditure for establishments not yet in production.

Analysis according to specialisation within the industry, 1954

Larger establishments in the United Kingdom

TABLE 4

	Unit	Specialist producers of synthetic organic dyestuffs and intermediates	Remainder of the industry	Total
Number of establishments	No.	16	18	34
Total value of sales and work done	£'000	43,238	15,644	58,881
Sales of characteristic products	"	29,126		
Products on hand for sale and work in progress	{ at beginning of year change during year	7,880 + 766	1,893 + 255	9,773 + 1,021
Gross output (production)	"	44,003	15,899	59,902
Purchases of materials and fuel	"	24,609	9,596	34,205
Customs and Excise drawback in respect of goods exported	"	3	-	3
Stocks of materials and fuel	{ at beginning of year change during year	3,361 + 150	1,314 + 43	4,675 + 193
Cost of materials and fuel used	"	24,459	9,553	34,012
Payment for work done on materials given out	"			
Payment for transport	"	590	310	900
Net output	"	18,957	6,036	24,993
Average number of employees	{ operatives others	8,964 5,745	3,306 1,650	12,270 7,395
Total employment	"	14,709	4,956	19,665
Net output per person employed	"	1,289	1,218	1,271
Wages and salaries	{ of operatives of others	4,832 4,476	1,602 1,278	6,434 5,754
Capital expenditure	"			
New building work (a)	"			480
Plant and machinery	{ acquisitions (a) disposals	(b)	(b)	1,580 41
Vehicles	{ acquisitions (a) disposals	62 51	29 12	92 63

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

(b) 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
	Th.cwt.	£'000	Th.cwt.	£'000	Number
Synthetic organic dyestuffs intermediates	888.1	8,349	958.3	10,499	25
Finished synthetic organic dyestuffs and preparations for dyeing (a)					
Direct (b)	155.8	3,728	173.1	4,050	10
Acid wool (b)	131.6	3,779	116.1	3,949	15
Chrome and mordant (including alizarine) (b)	60.2	1,334	68.4	1,583	12
Basic (b)	61.3	2,288	65.1	2,484	12
Sulphur (b)	106.8	963	134.0	941	6
Vat (c)	136.8	4,956	26.5	5,434	6
Oil spirit and wax (excluding pigment dyestuffs) (b) (d)	24.6	652	28.3	790	12
Acetate rayon (c) (e)	27.2	641	8.0	981	7
Azoic (b)	154.7	3,707	43.8	2,256	6
Other			51.3	3,351	20
Total finished synthetic organic dyestuffs and preparations for dyeing (excluding pigment dyestuffs) (a)	859.0	22,048	714.7	25,820	..
Purchased dyestuffs blended (excluding household dyes)	29.2	1,019	22.2	893	12
Household dyes	14.1	481	4.7	265	8
Extracts for dyeing and tanning					
Wholly or mainly of myrobalan	173.5	347	332.3	551	8
Wholly or mainly of quebracho	196.2	551	230.1	735	6
Wholly or mainly of wattle			640.7	1,530	6
Other vegetable tanning and dyeing extracts	883.3	1,994 (f)	99.7	250	6
Synthetic organic tanning extracts	..	104 (g)	33.8	94	..
Waste products	..	249	..	77	13
Work done for the trade or on commission		57 (h)
Total		35,199	..	41,051	..
Sales in other industries (see Table 6)		1,493		2,324	..
Principal products of this industry sold by establishments in the industry		33,707		38,727	32

(a) Firms were asked in 1954 to return the quantities of synthetic organic dyestuffs sold in terms of 100 per cent pure dye content (see headings marked (c)) or domestic standard powder strength (see headings marked (b)), in order to ensure that the figures returned were on a comparable basis. No instructions on the basis of return were given for earlier years. Comparability between the 1954 and 1951 figures appears to have been affected only in the case of vat dyes and acetate rayon dyes (see note (c)) and the total of finished synthetic organic dyestuffs.

(b) The quantity figures given for 1954 are in terms of domestic standard powder strength (paste being adjusted to the tinctorial equivalent of the powder strength). The 1951 figures are comparable.

(c) The quantity figures given for 1954 are in terms of 100 per cent pure dye content. Those given for 1951 are in terms of the manufacturers' 'standard' weight. On the 1951 basis, corresponding figures for 1954 are estimated to be as follows:-

Vat dyes 160 Th.cwt. Acetate rayon dyes 34 Th.cwt.

(d) For pigment dyestuffs see the Chemicals (General) Industry (Volume 2, Industry E).

(e) Described in 1951 as acetate silk.

(f) Other extracts for tanning.

(g) Other dyestuffs including extracts for dyeing.

(h) Amount charged.

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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.cwt.	£'000	Number	
Synthetic organic dyestuffs intermediates	199.6	1,531	12	2C, 2E, 2J
Purchased dyestuffs blended and household dyes	4.0	171	5	2E, 9E
Finished synthetic organic dyestuffs and preparations for dyeing (excluding pigment dyestuffs)	..	622	12	6D, 2E, 2F, 2L
Total	..	2,324	29	

(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
Disinfectants, insecticides, weed-killers, etc.	29.6	604
Synthetic organic chemicals for tanners' use, excluding dyes	166.1	491
Other chemical manufactures and products	1,217.0	7,734
	..	6,312
Other goods and work done	..	5,014
Total		20,155

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

Materials	Quantity	Cost
	Th.tons	£'000
Acid		
Hydrochloric (as at 1.14 specific gravity)	26.0	269
Sulphuric (on the basis of 100% acid)	72.9	854
Nitric (on the basis of 100% acid)	8.2	225
Alcohol	Th.proof gal.	
Ethyl, including methylated spirit	1,111.7	157
Methyl	1,272.1	156
Ammonia, liquid (in terms of 100% ammonia)	Th.tons	
	10.3	411
Benzole, refined	Th.gal.	
	4,020.6	681
Toluene, refined (in terms of 90's toluole)	1,335.2	303
Naphthalene (in terms of 66°C salts)	Th.tons	
	22.6	635
Other aromatic hydrocarbons	..	526
Phenol, cresols, xylols and other phenols	1.9	218
Synthetic organic dyestuff intermediates	Th.cwt.	
	630.8	7,571
Dyestuffs purchased for blending and further processing	Th.tons	
	65.1	2,670
Salt and brine (in terms of salt content)	Th.tons	
	56.0	266
Sodium carbonate, including soda crystals and soda ash (on the basis of 58°) and sodium bicarbonate	11.3	121
Caustic soda	36.6	503
Potassium compounds	2.6	139
Chlorine	3.8	108
Tanning materials		
Myrobalans	16.6	382
Other tanning materials	24.5	1,829
Vegetable extracts for dyeing and tanning	0.7	56
Synthetic tanning extracts	..	2
Packing materials		
Paper and board and containers of paper and board	..	156
Timber and containers of timber	..	226
Other	..	1,314
Replacement parts for firms' own machinery, plant and vehicles	..	957
Consumable tools bought as replacements	..	47
Woven cloth, including filter cloth and cloth for testing dyes, etc.	Th.sq.yds.	
	529.3	127
All other purchased material	..	11,193

DYES AND DYESTUFFS

Purchases of materials and fuel, 1954

Larger establishments in the United Kingdom

TABLE 9(contd.)

	Quantity	Cost
Fuel and electricity	Th. tons	£'000
Coal	409.2	1,339(a)
Coke	62.3	145(a)
Liquid fuel (including creosote/pitch mixtures)		
For use in internal combustion engines	Th. gal.	
Motor spirit (petrol) for use in road vehicles and deriv. fuel	}	71
Other		
For burning in furnaces, boilers, kilns, etc.	1,405.1	55
Gas purchased	Th. therms	
From Gas Boards	936.9	53
From other sources, including other departments of the same firms	-	-
Electricity purchased	Th. kWh.	
From Electricity Boards	102,732.0	432(a)
From other sources, including other departments of the same firms	1,632.0	8(a)
All other purchased fuel		..
Total cost		34,205

(a) Includes a proportion of all other purchased fuel.

Average number of employees and wages, salaries and superannuation payments

Larger establishments in the United Kingdom (a)

TABLE 10

	1951	1954
Average number of employees		
Operatives	12,987	12,270
Administrative, technical and clerical employees	7,716	7,395
Total	20,703	19,665
Wages and salaries paid to	£'000	£'000
Operatives	5,727	6,434
Administrative, technical and clerical employees	4,702	5,754
Total	10,428	12,188
Wages and salaries per head	£	£
Operatives	441	524
Administrative, technical and clerical employees	609	778

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DYES AND DYESTUFFS

TABLE 10(contd.)

	1951	1954
Superannuation and other pension funds for employees and dependants (b)		£'000
Employers' contributions	..	731
Employees covered	..	Number 18,538
Pension, etc. payments to former employees and dependants (b)	..	£'000 40

(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).

	United Kingdom	
	1951	1954
Canteen workers	Number	Number
Males	22	32
Females	366	377
Total	388	409
Other workers		
Males	300	380
Females	237	243
Total	537	623
Total excluded employees	925	1,032

(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

	Number					
	1951			1954		
	Males	Females	Total	Males	Females	Total
Working proprietors	-	-	-	-	-	-
Operatives	11,801	1,362	13,163	10,942	1,378	12,320
Administrative, technical and clerical employees	5,127	2,818	7,945	4,868	2,519	7,387
Total employees	16,928	4,180	21,108	15,810	3,897	19,707

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

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- Q. Textile Finishing
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- C. Biscuit
- D. Bacon Curing and Sausage

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- G. Ice Cream
- H. Sugar and Glucose
- I. Cocoa, Chocolate and Sugar Confectionery
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