

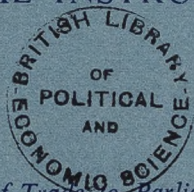
BOARD OF TRADE

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*The Report on the  
Census of Production  
for 1954*

Volume 5: Industry L

MUSICAL INSTRUMENTS



*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

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# The Report on the Census of Production for 1954

VOLUME 5, INDUSTRY L

MUSICAL INSTRUMENTS

THIS REPORT relates to establishments engaged wholly or mainly in the manufacture of pianos, organs and other musical instruments. The manufacture of gramophone records is included, but the manufacture of gramophones is excluded, the latter being covered by the Radio and Telecommunications Industry.

This industry corresponds to minimum list heading 103 in the Standard Industrial Classification.

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

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The following notes describe terms in general use in the tables of the report. More detailed explanations of the terms used and a description of the scope and method of taking the census are given in the separate booklet entitled 'The Report on the Census of Production for 1954 - Introductory Notes' (price 1s. 6d. net).

**Industrial Classification:** Establishments are classified to industries according to the nature of their output and, as far as possible, in conformity with the Standard Industrial Classification. Certain products are identified as the principal products of individual industries, the principal products for a given industry being of a similar nature or commonly associated in production. The principle of classification normally followed is that an establishment is classified to an industry if its output of the principal products of that industry accounted for a greater proportion of the value of its output than did its output of the principal products of any other industry.

**Specialist producers** normally comprise those establishments 50 per cent. or more of whose total output by value is accounted for by the characteristic products of the specialist group.

**Intermediate products:** For some industries figures are given showing the total quantities made during the year of intermediate products, i.e., products which may be further processed in the establishments in which they are produced.

**Larger establishments:** The information given in the report relates mainly to 'larger establishments', i.e., establishments of firms employing on the average more than 10 persons. In most cases an establishment comprises the whole of the premises under the same ownership or management at a particular address (e.g., a mine or factory). Offices, warehouses, laboratories and other ancillary places of business situated apart from the producing works are not regarded as separate establishments and are included in the return for the works.

**Small firms** are those employing on the average 10 or fewer persons.

The estimates for the industry as a whole given in Table 1 are normally obtained by increasing the other items shown in the same proportion as total employment.

**Gross output (production)** is the total value of goods made and other work done during the year; it is obtained by adjusting the value of sales and work done during the year for changes in the value of stocks of products on hand for sale and work in progress.

**Net output** is the amount left after deducting from the value of gross output the aggregate of the cost of materials and fuel used, the amount paid for work given out, and, for 1951 and 1954, any transport payments made. This represents the value added to materials by the process of production, and constitutes the fund from which wages, salaries, rents, rates and taxes, advertising and other selling expenses and all other similar charges have to be met, as well as depreciation and profits.

**Sales** means sales during the year of goods made in the establishment covered by the return or made on commission for it, whether produced in the year or not. The value of sales is the net selling value, i.e., the amount charged to customers, whether on an ex-works or delivered basis, and net of any trade discounts, agents' commissions, allowances for returnable cases, purchase tax, etc. For goods charged on a delivered basis to customers overseas, firms were required to give the f.o.b. value.

**Materials and fuel:** The total cost of materials and fuel purchased includes all purchases during the year of materials for use in production, and of fuel (includ-

ing oil, gas and electricity) for all purposes; packing materials, including the full cost of returnable cases when first purchased; workshop and office materials; water charges; materials for repairs to buildings, plant and vehicles when carried out by firms' own work-people included in their returns; consumable tools; and parts for machinery purchased as replacements. Purchases of goods for merchanting are excluded. The cost of materials and fuel used, given in Table 2, is obtained by adjusting purchases for changes during the year in the value of stocks.

**Stocks:** Firms were required to give stocks of materials and fuel, products on hand for sale, and work in progress, at income tax values.

**Customs and Excise Duty** paid on materials purchased is normally included in the cost of materials. Finished goods are similarly valued as they were sold, duty-paid or duty-free. The net amount of any duty paid is deducted in arriving at net output.

**Employment:** Total employment includes working proprietors, administrative, technical and clerical employees, and operatives, but excludes outworkers, canteen employees and persons engaged in merchanting or any other activity not covered by a firm's return, who are shown separately as excluded employees. Employees are persons on the pay-roll (i.e., persons whose National Insurance cards were held by employers), whether employed full-time or part-time.

**Working proprietors** are proprietors of businesses other than limited companies, together with members of their families who worked in the business without receiving fixed wages or salaries. Any persons working less than half the normal hours are excluded. For Northern Ireland directors of limited companies (other than those paid by fee only) are also included.

**Administrative, technical and clerical employees** include directors, other than those paid by fee only (except in Northern Ireland); managers, superintendents and works foremen; research, experimental, development, technical and design employees (other than operatives); draughtsmen and tracers; travellers; and office (including works office) employees.

**Operatives** include all other classes of employees, i.e., broadly speaking, all manual workers.

**Outworkers** are persons employed by the firm who work on materials supplied by the firm in their own homes.

**Wages and salaries** include all overtime payments, bonuses and commissions without any deductions for income tax, insurances, contributory pensions etc. They exclude payments to working proprietors.

**Capital expenditure** includes expenditure on new building work, and on plant, machinery and vehicles, charged to capital account during the year, including any transport and installation costs involved. It includes expenditure in respect of establishments in Great Britain which had not begun production before the end of the year (which has not previously been included in the Census of Production reports for individual industries).

**Symbols used:**

.. for not available

- for nil or negligible (less than half the final digit shown).

Where figures are rounded, e.g., given to the nearest £ thousand, there may be apparent slight discrepancies between the sums of constituent items and the totals shown. In some cases, figures have been combined with others of a similar nature where publication of separate details might disclose information relating to an individual undertaking.

Industry summary: Estimates for the industry as a whole

TABLE 1

	United Kingdom			Scotland 1954	Wales 1954
	1948	1951	1954		
	£ million	£ million	£ million	£ million	£ million
Gross output (production)	9.2	10.5	13.2	0.09	0.20
Net output	5.7	5.5	6.9	0.07	0.10
Total stocks and work in progress					
At beginning of year	2.9	2.8	3.2	0.04	0.04
Change during year	+ 0.4	+ 1.0	- 0.2	- 0.02	+ 0.01
Capital expenditure less disposals (a)	0.2	0.2	0.4	-	0.01
Wages and salaries	2.6	3.0	3.8	0.04	0.09
Total employment (including working proprietors)	Thousands	Thousands	Thousands	Thousands	Thousands
	7.7	8.0	8.6	0.11	0.25

(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.

TABLE 2

	Unit	Great Britain 1948	United Kingdom	
			1951	1954
<b>FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS</b>				
Number of establishments	No.	97	108	95
Total value of sales and work done	£'000	7,347	8,909	11,824
Products on hand for sale	{ at beginning of year	888	1,154	1,369
and work in progress	{ change during year	+ 195	+ 153	- 60
Gross output (production) (a)		7,501	9,062	11,764
Purchases of materials and fuel		2,997	4,847	4,138
Stocks of materials and fuel	{ at beginning of year	1,447	1,233	1,534
and work in progress	{ change during year	+ 154	+ 686	- 104
Cost of materials and fuel used		2,843	4,161	4,242
Amount of artistes' royalties and fees and copyright payments		..	..	1,210
Payment for work done on materials given out		25	36	28
Payment for transport (b)		40	62	126
Net output		4,633	4,803	6,159
Average number of employees	{ operatives	5,140	5,902	6,066
and others	{ others	1,168(c)	990	1,624
Total employment (d)		6,323	6,908	7,708
Net output per person employed (d)	£	733	695	799
Wages and salaries	{ of operatives	£'000	1,562	2,088
and others	{ of others		567	872
Capital expenditure				
New building work (e)		33	16	53
Plant and machinery	{ acquisitions (e)	103	123	305
and vehicles	{ disposals	6	5	12
and vehicles	{ acquisitions (e)	12	48	53
and vehicles	{ disposals	4	12	20
<b>FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS</b>				
Number of returns	No.	235	176(f)	153
Total employment, including working proprietors		1,213	948(f)	823

(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.

## MUSICAL INSTRUMENTS

Analysis by size, 1954

Larger establishments in the United Kingdom

TABLE 3

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	32	638	345	472	78	182	41	8	617
25 - 49	32	1,293	664	960	113	404	63	24	614
50 - 99	15	1,182	753	926	148	365	100	68	701
100 - 299	13	2,582	1,386	1,738	255	724	141	85	695
400 and over	3	6,068	3,011	1,970	1,030	891	526	226	1,004
Total	95	11,764	6,159	6,066	1,624	2,565	872	411	799

(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.

Analysis according to specialisation within the industry, 1954

Larger establishments in the United Kingdom

TABLE 4

	Unit	Specialist producers of pianos, organs and parts thereof (including organs rebuilt and piano and organ tuning and repair)	Remainder of the industry	Total
Number of establishments	No.	73	22	95
Total value of sales and work done	£'000	4,403	7,421	11,824
Sales of characteristic products	"	4,265		
Products on hand for sale	{ at beginning of year	668	700	1,369
and work in progress	{ change during year	38	21	60
Gross output (production)	"	4,365	7,399	11,764
Purchases of materials and fuel	"	1,867	2,270	4,138
Stocks of materials and fuel	{ at beginning of year	663	871	1,534
	{ change during year	28	132	104
Cost of materials and fuel used	"	1,840	2,402	4,242
Amount of artistes' royalties and fees and copyright payments	"	4	1,205	1,210
Payment for work done on materials given out	"	6	22	28
Payment for transport	"	65	61	126
Net output	"	2,450	3,709	6,159
Average number of employees	{ operatives	No. 3,349	2,717	6,066
	{ others	" 400	1,224	1,624
Total employment (a)	"	3,763	3,945	7,708
Net output per person employed (a)	£	651	940	799
Wages and salaries	{ of operatives	£'000 1,393	1,172	2,565
	{ of others	" 247	626	872
Capital expenditure	"			
New building work (b)	"	15	39	53
Plant and machinery	{ acquisitions (b)	" 56	248	305
	{ disposals	" -	11	12
Vehicles	{ acquisitions (b)	" 25	28	53
	{ disposals	" 10	10	20

(a) Excluding outworkers and including working proprietors.

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

## MUSICAL INSTRUMENTS

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
	Number	£'000	Number	£'000	Number
Pianos and parts thereof					
Complete (except reconditioned pianos)	18,211	1,829	20,458	2,112	23
Parts					
Keyboard sets	20,273	134	29,994	196	5
Actions	..	335	26,512	263	..
Other parts (a)	..	..	..	226	16
Organs and harmoniums and parts thereof					
Complete (except rebuilt organs)	147	252	330	335	17
Parts and fittings	..	101	..	98	13
Stringed musical instruments, including parts and accessories (except strings wholly of gut) but excluding reconditioned instruments	..	73	..	56	6
Wood and metal wind instruments					
Complete (except reconditioned instruments)	Th. 45.4	287	Th. 37.0	363	6
Parts and accessories	..	31	..	23	5
Percussion instruments					
Complete (except reconditioned instruments)	No. ..	106	No. 45,541	165	6
Parts and accessories	..	63	..	94	5
Musical instruments (excluding gramophones and reconditioned instruments) and parts and accessories, not elsewhere specified	..	..	..	131	6
Gramophone records					
Musical	..	3,602	Th. 38,627.3	5,578	..
Other	..	..	855.1	57	..
Musical instruments reconditioned and re-sold					
Pianos	6,548	405	7,884	360	18
Other	..	82	..	51	..
Biscuits (gramophone record blanks), so far as recorded separately; matrices impressed for the reproduction of gramophone records, other intermediate products and recording tape	..	156(b)	..	885	5
Waste products	..	21	..	27	14
Work done for the trade or on commission (c)	..	15	..	63	..
Repairs (including renovations, upkeep and tuning of musical instruments) (c)					
Organs rebuilt	202	251	168	320	24
Other	..	481	..	386	41
Total		8,250		11,878	..
Sales in other industries (see Table 6)		41		429	
Principal products of this industry sold by establishments in the industry		8,209		11,449	95

(a) Excluding piano frames of cast iron (included in Iron Foundries, Volume 3, Industry C) and piano wire (included in Wire and Wire Manufactures, Volume 5, Industry D).

(b) Not including other intermediate products and recording tape.

(c) Amount charged.

## MUSICAL INSTRUMENTS

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	
Musical instruments and parts, including biscuits (gramophone record blanks)	..	£'000 424	5	3I, 5E, 3K, 11I
Repairs (including renovations, upkeep and tuning of musical instruments) other than organs rebuilt (b)	..	5	..	
Total		429	..	

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

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

TABLE 7

	1954	
	Quantity	Value
Furniture mainly of wood	..	£'000 19
Other manufactures of timber	..	88
Other goods	..	239
Work done (a)	..	29
Total	..	375

(a) Amount charged.

TABLE 8 - Total make of intermediate products  
Larger establishments in the United Kingdom

This table is not applicable to the industry.

## MUSICAL INSTRUMENTS

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

TABLE 9

	Quantity	Cost
	Th.cu.ft.	£'000
<b>Materials</b>		
Timber, including timber used for packing purposes:-		
Hardwood	203.5	221
Softwood and plywood (including battenboard, blockboard and laminboard)	98.7	90
Brass and other copper alloys (including nickel alloys and cupro-nickel, but excluding all other nickel alloys) in all forms except finished parts and scrap	Th.cwt. 2.5	55
Copper in all forms except finished parts and scrap	1.7	27
Iron and steel in all forms except finished parts and scrap	2.0	14
Finished plastics components and fittings	..	4
Shellac	34.7	453
Piano frames	Th. 18.3	117
Piano and other keyboard sets	..	17
Piano actions	16.7	126
Second hand pianos	..	28
Purchased recordings on matrices and on magnetic tape	16.5	174
Packing materials	..	26
Packing cases (wood or mainly wood)	6.5	148
Other packing materials	..	20
All other purchased materials and components	..	4
Fuel and electricity	Th.cu.ft.	
Coal	51.5	38
Coke	..	37
Liquid fuels (including creosote/pitch mixtures)	..	287
Gas purchased	..	1,971
From Gas Boards	Th.tons 2.6	13
From other sources, including other departments of the same firms	..	8
Electricity purchased	Th.gal. 1,177.1	66
From Electricity Boards	Th.therms 250.6	16
From other sources, including other departments of the same firms	..	2
All other purchased fuel	43.9	3
From Electricity Boards	Th.kWh. 10,973	65
From other sources, including other departments of the same firms	..	9
All other purchased fuel	855	5
Total cost		11
		4,138

## MUSICAL INSTRUMENTS

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

Larger establishments in the United Kingdom

TABLE 10

	1951	1954
	Number	Number
Average number of employees		
Operatives	5,902	6,066
Administrative, technical and clerical employees	990	1,624
Total	6,892	7,690
	£'000	£'000
Wages and salaries paid to		
Operatives	2,088	2,565
Administrative, technical and clerical employees	521	872
Total	2,608	3,438
	£	£
Wages and salaries per head		
Operatives	354	423
Administrative, technical and clerical employees	526	537
		£'000
Superannuation and other pension funds for employees and dependents (b)		
Employers' contributions	..	51
		Number
Employees covered	..	2,601
		£'000
Pension, etc. payments to former employees and dependents (b)	..	8

(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.

	United Kingdom	
	1951	1954
	Number	Number
Canteen workers		
Males	3	2
Females	51	41
Total	54	43
Other workers		
Males	63	14
Females	17	1
Total	80	15
Total excluded employees	134	58

Payments to outworkers in 1954 were £5,000.

(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	16	-	16	18	-	18
Operatives	4,718	1,251	5,969	4,875	1,304	6,178
Administrative, technical and clerical employees	598	451	1,049	841	802	1,643
Total employees	5,316	1,702	7,018	5,716	2,106	7,822

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

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- G. Electricity Supply Industry
- H. Water Undertakings

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