

BOARD OF TRADE

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*The Report on the
Census of Production
for 1954*

Volume 4: Industry H

PRINTING AND BOOKBINDING MACHINERY



*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

1958

PRICE 1s 9d NET

The Report on the Census of Production for 1954

VOLUME 4 INDUSTRY H

PRINTING AND BOOKBINDING MACHINERY

THIS REPORT on the Printing and Bookbinding Machinery Industry relates to establishments engaged wholly or mainly in the manufacture of typesetting machinery, printing presses, ruling machines, wire stitching machinery, and cardboard box, paper bag and envelope making machinery.

This industry corresponds to minimum list heading 69(8) in the Standard Industrial Classification.

LIST OF TABLES

Table No.	Title	Page	Table No.	Title	Page
1	Industry summary: estimates for the industry as a whole	4/H/3	6	Sales of principal products of the industry by establishments classified to other industries	4/H/5
2	Summary of returns received	4/H/3	7	Sales in the industry of other than principal products	4/H/6
3	Analysis by size, 1954	4/H/4	8	Total make of intermediate products	4/H/6
4	Analysis according to specialisation within the industry, 1954	Does not apply	9	Purchases of materials and fuel, 1954	4/H/7
5	Sales of principal products of the industry, including sales of these products by establishments classified to other industries	4/H/4	10	Average number of employees and wages, salaries and superannuation payments	4/H/9
			11	Employment in a specified week	4/H/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 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)	12.9	22.5	22.2	0.20	-
Net output	8.8	14.0	15.2	0.14	-
Total stocks and work in progress					
At beginning of year	4.8	7.1	8.7	0.04	-
Change during year	+ 0.8	+ 1.2	- 0.3	-	-
Capital expenditure less disposals (a)	0.5	0.6	0.6	-	-
Wages and salaries	5.2	7.9	8.7	0.09	-
Total employment (including working proprietors)	Thousands	Thousands	Thousands	Thousands	Thousands
	15.3	19.4	17.3	0.24	-

(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

TABLE 2

	Unit	Great Britain 1948	United Kingdom	
			1951	1954
FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS				
Number of establishments	No.	104	119	115
Total value of sales and work done	£'000	12,084	21,407	22,065
Products on hand for sale	" {	3,950	5,661	6,759
at beginning of year				
and work in progress	" {	+ 622	+ 784	- 139
change during year				
Gross output (production) (a)	"	12,641	22,192	21,926
Purchases of materials and fuel	"	3,728	7,516	5,670
Stocks of materials and fuel	" {	765	1,347	1,855
at beginning of year				
change during year	" {	+ 166	+ 442	- 134
Cost of materials and fuel used				
Payment for work done on materials given out	"	3,562	7,074	5,804
Payment for transport (b)	"	477	1,096	993
	"	65	147	151
Net output	"	8,602	13,875	14,978
Average number of employees	" {	11,814	13,875	14,978
operatives				
others	"	3,184(c)	4,353	4,361
Total employment (d)	"	15,007	19,143	17,031
Net output per person employed (d)	£	573	725	879
Wages and salaries	" {	£'000	3,704	5,509
of operatives				
of others	"	1,386	2,334	2,844
Capital expenditure				
New building work (e)	"	132	137	67
Plant and machinery	" {	374	394	485
acquisitions (e)				
disposals	"	26	39	30
Vehicles	" {	28	65	76
acquisitions (e)				
disposals	"	3	13	21
FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS				
Number of returns	No.	41	31(f)	32
Total employment, including working proprietors	"	268	218(f)	184

(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.

PRINTING AND BOOKBINDING MACHINERY

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 (c)	22	353	243	258	62	121	42	7	753
25 - 49	25	1,156	765	696	198	306	152	34	855
50 - 99	30	2,716	1,755	1,615	520	782	349	71	822
100 - 199	17	2,686	1,766	1,702	526	745	323	73	793
200 - 299	11	2,971	2,032	2,012	607	897	434	125	776
300 - 749	5	3,991	2,377	1,660	729	832	456	157	995
750 and over	5	8,053	6,040	4,722	1,719	2,057	1,088	162	938
Total	115	21,926	14,978	12,665	4,361	5,739	2,844	628	879

(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.

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

No specialisation within this industry was distinguished.

Sales of the principal products of the industry, including sales of these products by establishments classified to other industries

Larger establishments in the United Kingdom

TABLE 5

Kind of output (i) Complete machines (ii) Parts	1951		1954		
	Quantity	Value	Quantity	Value	Entries
	Number	£'000	Number	£'000	Number
New machines and parts					
Typesetting (including keyboard and type-casting)	{(i) .. {(ii) ..	1,157 1,243(a)	1,288 ..	2,241 1,742	5 7
Stereotyping and electro-typing	{(i) 895 {(ii) ..	232 124 72	649	350 31 41	8 8
Photo-engraving	{(i) 373 {(ii) ..	198 295 20	578	210 170 37	8 8
Printing					
Newspaper rotary	{(i) 20 {(ii) ..	804 426 330	25 ..	1,797 371	.. 10
Other reel-fed machines	{(i) 256 {(ii) ..	1,314 246	232 ..	1,124 317	17 20
Sheet-fed machines					
Letterpress	{(i) 2,506 {(ii) ..	2,020 129	3,806 ..	2,311 41 197	20 21
Litho and litho-offsets	{(i) 1,217 {(ii) ..	3,393 46 357	1,078	2,608 73 328	12 11
Other	{(i) 1,232 {(ii) ..	620(a) 56 49(a)	610	582 79 153	22 27

PRINTING AND BOOKBINDING MACHINERY

TABLE 5 (contd.)

Kind of output (i) Complete machines (ii) Parts	1951		1954		
	Quantity	Value	Quantity	Value	Entries
	Number	£'000	Number	£'000	Number
New machines and parts (contd.)					
Printing (contd.)					
Other new printing machinery	{(i) .. {(ii) ..	1,459(a) 547(a)	1,485 429	43 41
Typesetting, etc. and printing machinery, unclassified	{(i) .. {(ii) ..	2,102 469	- ..	- 12	- ..
Bookbinding, including blocking, embossing, stitching, ruling and cutting, folding, etc.	{(i) 3,464 {(ii) ..	909 189 181	2,112 ..	588 116 163	33 32
Paper-working, etc. machines					
Bag and envelope making	{(i) 279 {(ii) ..	565 17 63	149 ..	462 178 83	16 17
Cardboard box and carton making	{(i) 1,938 {(ii) ..	758 137	1,551 ..	1,152 236	26 31
Guillotines	{(i) 1,294 {(ii) ..	675 99	770 ..	431 59	23 18
Other	{(i) 4,046 {(ii) ..	1,144(a) 330(a)	2,166 ..	903 58 421	55 56
Printing, bookbinding, paper-working, etc. machines, reconditioned	{(i) .. {(ii) ..	272 55	247 16	32 11
Printers' accessories, e.g., wood and metal furniture	..	490	..	383	18
Waste products sold, other than scrap metals	..	1	..	12	9
Repair and jobbing work (b)	..	403	..	454	45
Work done for the trade or on commission (c)	..	108	..	278	23
Total		24,104		22,968	..
Sales in other industries (see Table 6)		4,298		2,830	..
Principal products of this industry sold by establishments in the industry		19,805		20,138	101

(a) Amended figures.

(b) Amount charged, exclusive of the value of goods made and recorded as output.

(c) Amount charged.

Sales of principal products of the industry by establishments classified to other industries

Larger establishments in the United Kingdom

TABLE 6

Kind of output (i) Complete machines (ii) Parts	1954			Principal industries in which produced (a)
	Quantity	Value	Entries	
	Number	£'000	Number	
New machines and parts				
Typesetting, stereotyping and electro-typing and photo-engraving machines	{(i) 41 {(ii) ..	73 7	6 9	4I, 4J 4I
Printing				
Newspaper rotary	{(i) - {(ii) ..	- 15	- ..	4I
Other reel-fed machines	{(i) 19 {(ii) ..	22 22	.. 7	4I 4I, 4J
Sheet-fed machines				
Letterpress	{(i) 514 {(ii) ..	572 33	5 9	4I 4I
All other sheet-fed machines	{(i) 393 {(ii) ..	594 144	15 22	4C, 4F, 4I, 4J 4C, 4I, 4J

TABLE 6 (contd.).

Kind of output (i) Complete machines (ii) Parts	1954			Principal industries in which produced (a)
	Quantity	Value	Entries	
	Number	£'000	Number	
New machines and parts (contd.)				
Printing (contd.)				
Other new printing machinery	{ (i) .. (ii) ..	408 106	24 27	3I, 4C, 4I, 4J 4C, 4I
Bookbinding, including blocking, embossing, stitching, ruling and cutting, folding, etc.	{ (i) 332 (ii) ..	80 12 50	15 17	4D, 4I, 4J, 10K 4D, 4I, 4J
Paper working, etc. machines				
Bag and envelope making	{ (i) 26 (ii) ..	26 11	6 7	4I, 4J 4C
Cardboard box and carton making	{ (i) 777 (ii) ..	163 70	9 14	4C, 4I, 4J 4I
Guillotines	{ (i) 150 (ii) ..	100 8	8 5	4C, 4I 4C
Other	{ (i) 297 (ii) ..	108 54 88	27 31	4C, 4I, 4J, 11F 4C, 4I
Printing, bookbinding, paper-working, etc. machines, reconditioned	{ (i) .. (ii) ..	19 14	7 ..	4I, 4J 4I, 4J
Printers' accessories, e.g. wood and metal furniture	..	29	7	4I
Total		2,830	..	

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

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

TABLE 7

	1954	
	Quantity	Value
		£'000
Machinery and parts (other than printing, bookbinding, etc. machines and parts)	..	946
Scrap metals sold	..	44
Other goods	..	840
Work done (a)	..	96
Total		1,927

(a) Amount charged.

Total make of certain intermediate products
Larger establishments in the industry

TABLE 8

	1951	1954	
	Quantity	Quantity	Entries
	Th. tons	Th. tons	Number
Other than principal products			
Castings			
Iron (a)			
Grey and high duty	4.7	3.8	6
Malleable (white or black heart)			

(a) For total output returned in all industries see the Iron Foundries Industry (Volume 3, Industry C).

Purchases of materials and fuel, 1954

Larger establishments in the United Kingdom

TABLE 9

Materials	Quantity	Cost
	Th. tons	£'000
Iron and steel		
Drop forgings	..	9
Wrought tubes and fittings for wrought tubes	0.2	18
Wire (single wire)	..	3
Wire manufactures, including wire cables and ropes and stranded wire of two or more ply	..	3
Chains		
Transmission and conveyer types	..	16
Other chains	..	5
Iron and steel scrap	1.3	9
Other iron		
Pig-iron, except refined pig-iron	2.2	39
Castings in the rough or machined except machined castings elsewhere specified	6.8	597
Other iron, except finished parts	..	5
Other steel (alloy and non-alloy)		
Ingots, blooms, billets, and slabs, and sheet and tinplate bars	..	2
Angles, shapes, sections, bars, rods (including wire rods) and girders, beams and joists (not fabricated)	4.1	257
Castings in the rough or machined, except machined castings elsewhere specified	0.1	14
Forgings, except drop-forgings, in the rough or machined, except machined forgings elsewhere specified	..	8
Forgings, except drop-forgings, in the rough or machined, except machined forgings elsewhere specified	0.5	59
Tin-, terne-, and black-plates and tinned and terne sheets	..	1
Other plates and sheets, 1/8 inch thick and over, and hoop and strip (including tape) of all thicknesses	0.5	28
Other plates and sheets under 1/8 inch thick, including electrical quality sheets	..	4
Other plates and sheets under 1/8 inch thick, including electrical quality sheets	0.5	28
Springs, laminated and other types	..	13
Light metals and non-ferrous metals in all forms, except finished parts, wire and scrap	Th.cwt.	
Aluminium and aluminium alloys	3.7	80
Magnesium and magnesium alloys	..	24
Brass and other alloys of copper, including nickel silver and cupro-nickel, but excluding other nickel alloys	..	2
Castings	4.1	85
Other	5.9	113
Copper	0.3	5
Lead and alloys of lead, except solder	..	1
Tin	0.5	4
Zinc	..	1
Non-ferrous metal wire, not insulated	0.2	2
Scrap non-ferrous metals	..	1
Insulated wires and cables	0.3	3
Rubber in all forms, including finished parts	..	18
Refractory materials	0.3	13
Asbestos in all forms, including finished parts	..	19
Paint, enamel and varnish	..	10
Lubricating oils and greases (including cutting oil and emulsions)	..	2
Lubricating oils and greases (including cutting oil and emulsions)	..	27
Lubricating oils and greases (including cutting oil and emulsions)	Th.gal.	
Lubricating oils and greases (including cutting oil and emulsions)	35	10
Lubricating oils and greases (including cutting oil and emulsions)	..	8

TABLE 9 (contd.)

	Quantity	Cost
	Th.cu.ft.	£'000
Materials (contd.)		
Timber (excluding timber for making into packing cases, etc. or for repairing returnable cases)		
Hardwood and softwood	22	25
	..	17
	Th.sq.ft.	
Plywood, including battenboard, blockboard and laminboard	89	15
	..	12
Nuts, bolts, screws, studs, rivets, washers, nails, tacks, etc.	..	99
Purchased components for incorporation in own products	..	62
Ball and roller bearings and parts	..	62
	Number	
Electric motors	4,359	116
	..	98
Pumps	616	18
	..	16
Industrial valves	..	2
Gears and gearwheels of metal	..	68
Measuring instruments and gauges and parts	..	2
Electronic (including valves)	..	6
Other	..	6
Other purchased components	..	4
Finished components of plastic materials	..	4
Other, not elsewhere specified	..	1,184
Replacement parts for own plant, machinery and vehicles	..	73
Consumable tools, including gauges, etc. bought as replacement	..	133
Packaging materials		
Paper and paperboard, and cardboard boxes, fibreboard packing cases, etc.	..	19
	Th.cu.ft.	
Timber and timber packing cases, etc.	34	27
	..	78
Other packing materials	..	15
All other purchased materials	..	590
Unclassified materials	..	1,055
Fuel and electricity	Th.tons	
Coal	13.9	55
Coke	6.2	38
Liquid fuel (including creosote/pitch mixtures)		
For use in internal combustion engines	Th.gal.	
Motor spirit (petrol) for use in road vehicles, deriv. fuel and other liquid fuels	244	37
For burning in furnaces, boilers, kilns, etc.	535	23
Gas purchased	Th.therms	
From Gas Boards	500	32
	..	13
From other sources, including other departments of the same firms	-	-
Electricity purchased (a)	Th.kWh.	
From Electricity Boards	14,710	97
	..	29
From other sources, including other departments of the same firms	821	7
All other purchased fuel	..	6
Total cost		5,670

(a) The total quantity of electricity generated in firms' own establishments in this industry in 1954 was 3,779 Th.kWh.

(89982)

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	Number	Number
Operatives	14,778	12,665
Administrative, technical and clerical employees	4,353	4,361
Total	19,131	17,026
Wages and salaries paid to	£'000	£'000
Operatives	5,509	5,739
Administrative, technical and clerical employees	2,334	2,844
Total	7,843	8,583
Wages and salaries per head	£	£
Operatives	373	453
Administrative, technical and clerical employees	536	652
Superannuation and other pension funds for employees and dependents (b)		£'000
Employers' contributions	..	178
Employees covered	..	7,057
		£'000
Pension, etc. payments to former employees and dependents (b)	..	32

(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).

	1951	1954
Canteen workers	Number	Number
Male	12	3
Female	226	192
Total	238	195
Other workers		
Male	87	62
Female	31	31
Total	118	93
Total excluded employees	356	288

(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	10	2	12	4	1	5
Operatives	13,608	1,011	14,619	11,639	1,028	12,667
Administrative, technical and clerical employees	2,979	1,408	4,387	3,043	1,420	4,463
Total employees	16,587	2,419	19,006	14,682	2,448	17,130

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

LIST OF INDUSTRY REPORTS

VOLUME 1

- A. Coal Mines
- B. Non-Metalliferous Mines and Quarries (other than Coal, Salt and Slate)
- C. Salt Mines, Brine Pits and Salt Works
- D. Slate Quarries and Mines
- E. Metalliferous Mines and Quarries
- F. Brick and Fireclay
- G. China and Earthenware
- H. Glass Containers
- I. Glass (other than Containers)
- J. Cement
- K. Abrasives
- L. Building Materials
- M. Manufactured Fuel

VOLUME 2

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

VOLUME 3

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

VOLUME 4

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

VOLUME 4 (contd.)

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

VOLUME 5

- A. Tool and Implement
- B. Cutlery
- C. Chain, Nail, Screw and Miscellaneous Forgings
- D. Wire and Wire Manufactures
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