

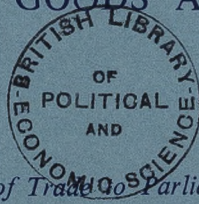
BOARD OF TRADE

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[HA 251]

*The Report on the
Census of Production
for 1954*

Volume 6: Industry N

CANVAS GOODS AND SACKS



*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 6 INDUSTRY N

CANVAS GOODS AND SACKS

THIS REPORT on the Canvas Goods and Sacks Industry relates to establishments engaged wholly or mainly in making-up canvas goods and in the manufacture and repair of sacks and bags.

This industry corresponds to minimum list heading 122(1) in the Standard Industrial Classification.

Particulars available in respect of H.M. prisons are given separately in footnote (b) to Table 2(i).

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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.

TABLE 1 Industry summary: Estimates for the industry as a whole

	United Kingdom			Scotland 1954	Wales 1954
	1948	1951	1954		
Gross output (production)	£ million 30.5	£ million 45.9	£ million 40.6	£ million 10.92	£ million 0.49
Net output	6.2	8.6	9.0	2.05	0.15
Total stocks and work in progress					
At beginning of year	3.9	4.2	5.2	0.96	0.02
Change during year	+ 0.3	+ 1.9	+ 0.1	+ 0.10	-
Capital expenditure less disposals (a)	0.3	0.4	0.7	0.10	0.26
Wages and salaries	3.2	4.2	5.4	1.07	0.09
Total employment (including working proprietors)	Thousands 14.0	Thousands 15.4	Thousands 16.8	Thousands 3.27	Thousands 0.31

(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 (i) Summary of returns received (a)(b)

	Unit	Great Britain 1948	United Kingdom	
			1951	1954
FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS				
Number of establishments	No.	241	290	308
Total value of sales and work done	£'000	26,392	41,443	37,008
Products on hand for sale	"	868	1,373	1,494
and work in progress	"	+ 239	+ 636	- 53
Gross output (production) (c)	"	26,485	42,079	36,955
Purchases of materials and fuel	"	20,621	34,544	28,029
Stocks of materials and fuel	"	2,404	2,410	3,090
Cost of materials and fuel used	"	+ 35	+ 1,103	+ 171
Payment for work done on materials given out	"	20,586	33,441	27,858
Payment for transport (d)	"	464	489	582
Net output	"	146	448	460
Average number of employees	"	5,435	7,701	8,055
Total employment (f)	No.	10,171	11,939	12,790
Net output per person employed (f)	"	1,583(e)	1,845	2,094
Wages and salaries	£	11,789	13,831	14,929
	"	461	557	540
Wages and salaries	£'000	1,981	2,683	3,418
Capital expenditure	"	713	1,119	1,352
New building work (g)	"	102	97	215
Plant and machinery	"	104	164	194
Vehicles	"	9	16	9
	"	54	135	100
	"	10	32	37

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

(b) H.M. prisons are excluded from this report. The following information relating to these institutions was recorded:

	1948 £'000	1951 £'000	1954 £'000
Gross output	1,187	1,097	1,276
Cost of materials and fuel used	1,008	984	1,219

(c) 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.

(d) 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.

(e) Number in week ended September 25, 1948.

(f) Excluding outworkers and including working proprietors.

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

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TABLE 2(ii)

Small firms in Great Britain (a)

	Unit	1948	1951	1954
Number of returns	No.	270	259	278
Gross output (sales)	£'000	2,206	3,048	2,676
Purchases of materials and fuel	"	1,569	2,277	1,877
Payment for work done on materials given out	"	77	18	35
Net output (b)	"	560	753	764
Total employment (c)	No.	1,403	1,304	1,454
Males	"	835	787	876
Females	"	568	517	578

(a) Firms employing on the average ten or fewer persons, that made satisfactory returns. In 1954 there were 7 small firms in Northern Ireland employing 52 persons (39 males and 13 females).

(b) The value of net output in this Table is the difference between the value of gross output (sales) and cost of materials and fuel purchased during the year, less payment for work done on materials given out.

(c) Including working proprietors.

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)	131	3,578	1,111	1,777	325	499	194	73	522
25 - 49	95	8,229	1,809	2,908	490	759	327	99	531
50 - 99	49	11,690	2,102	2,940	549	804	357	84	601
100 - 199	25	8,510	1,862	3,220	493	903	294	147	501
200 - 499	8	4,948	1,171	1,945	237	454	179	107	537
Total	308	36,955	8,055	12,790	2,094	3,418	1,352	508	540

(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 eleven 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
		New sacks and bags			Reconditioned second-hand sacks and bags	Made-up goods of sailcloth or canvas		
		Jute	Cotton	Other				
Number of establishments	No.	38	12	6	107	101	44	308
Total value of sales and work done	£'000	14,652	1,019	366	7,620	10,401	2,951	37,008
Sales of characteristic products	"	11,944	780	313	6,251	8,380		
Products on hand for sale and work in progress	{ at beginning of year	239	21	19	401	693	120	1,494
	{ change during year	- 34	- 4	- 3	+ 12	- 24	-	- 53
Gross output (production)	"	14,619	1,014	363	7,632	10,378	2,950	36,955
Purchases of materials and fuel	"	12,541	770	232	5,731	7,084	1,672	28,029
Stocks of materials and fuel	{ at beginning of year	907	151	32	232	1,446	322	3,090
	{ change during year	+ 260	+ 28	- 5	+ 50	- 134	- 29	+ 171
Cost of materials and fuel used	"	12,280	742	237	5,681	7,217	1,701	27,858
Payment for work done on materials given out	"	502	1	-	11	59	8	582
Payment for transport	"	186	13	5	174	61	22	460
Net output	"	1,650	259	121	1,766	3,040	1,219	8,055
Average number of employees	{ operatives	2,436	514	122	3,416	4,096	2,206	12,790
	{ others	415	67	28	515	818	251	2,094
Total employment (a)	"	2,854	586	150	3,961	4,918	2,460	14,929
Net output per person employed (a)	£	578	441	807	446	618	496	540
Wages and salaries	{ of operatives	596	112	45	810	1,255	598	3,418
	{ of others	318	53	27	350	460	144	1,352
Capital expenditure	"							
New building work (b)	"	31	-	2	58	113	11	215
Plant and machinery	{ acquisitions (b)	35	1	2	60	62	33	194
	{ disposals	1	-	-	1	4	2	9
Vehicles	{ acquisitions (b)	26	2	4	34	31	3	100
	{ disposals	9	-	2	11	13	-	37

(a) Excluding outworkers and including working proprietors.

(b) 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 (a)

TABLE 5(i)

	1951		1954		Entries
	Quantity	Value	Quantity	Value	
New sacks and bags	Th.	£'000	Th.	£'000	Number
Of jute					
Hessian	120,343	14,061	170,719	14,680	79
Other	9,963	2,266	6,754	1,121	43
	..	337	..	..
Of cotton	70,419	1,680	43,711	1,149	38
	..	179	..	178	
Of other vegetable fibres			205	179	19
	768	230	..	132	
Unclassified	-	-	1,591	345	..
Total new sacks and bags	201,493	18,238	222,980	17,474	..
	..	515	..	310	
Second-hand sacks and bags, sorted, cleaned, repaired, etc., and sold (i.e., sold other than 'as rise')					
Of jute	135,983	12,929	149,684	7,038	148
	..	1,364	..	1,250	
Of other vegetable fibres	1,251	108	531	30	14
	..	23	..	34	
Finished brattice cloth	Th.cwt. 62.2	472	Th.cwt. 39.7	244	6
Made-up goods of sailcloth or canvas					
Of linen or hemp	Th.sq.yds.		Th.sq.yds.		
Tarpaulins, wagon sheets, rick covers and the like	7,898	3,417	6,230	2,326	70
	..	..	..	415	
Awnings, blinds, sunshades and other garden furnishings	..	244	..	113	17
Other made-up goods of linen or hemp	..	413	..	676	51
Of jute					
Tarpaulins, wagon sheets, rick covers and the like	1,172	291	1,173	255	46
	..	372	..	37	
Other made-up goods of jute	..	..	..	780	51
Of cotton					
Tents and marquees	..	707	..	1,709	41
Tarpaulins, wagon sheets, rick covers and the like	2,636	1,388	2,010	874	70
	..	144	..	189	
Other made-up goods of cotton	..	1,793	..	2,604	76
Of other materials	..	439	..	237	26
Purchased sacks, new and second-hand, printed to customers' requirements but not otherwise processed	Th. 5,050	663	Th. 6,502	581	52
	..	..	..	59	
Waste products	..	284	..	278	113
Work done for the trade or on commission (b)					
Sacks and bags made from customers' own materials					
Of jute	51,588	441	59,858	501	23
Of other vegetable fibres	3,448	17	849	3	5
Cleaning and repairing bags, sacks and other canvas goods for customers	..	676	..	565	70

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CANVAS GOODS AND SACKS

TABLE 5 (i) (contd.)

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
	Th.	£'000	Th.	£'000	Number
Work done for the trade or on commission (b) (contd.)					
Other work done	..	659	..	913	67
Total		45,596		39,503	..
Sales in other industries (see Table 6)		5,526		5,222	..
Principal products of this industry sold by establishments in the industry		40,069		34,281	255

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

Total sales by small firms in Great Britain (a)

TABLE 5 (ii)

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
	Th.	£'000	Th.	£'000	Number
New sacks and bags					
Of jute	1,659	204	1,271	135	36
Of cotton	679	42	1,293	30	17
Of other vegetable fibres	28	14	25	11	7
Made-up canvas goods	..	1,360	..	1,263	159
Second-hand sacks and bags	6,780	693	8,236	491	72
Purchased sacks printed to customers' requirements	956	124	812	111	22
Other kinds of goods made or repaired and sold	..	326	..	465	101
Amount charged for work done for the trade or on commission		68		65	35
Total		3,048		2,676	278

(a) Firms employing on the average ten or fewer persons, that made satisfactory returns.

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.	£'000	Number	
New sacks and bags				
Of jute	37,809	2,471	12	6G, 6H, 6Q, 7D
Of cotton	2,757	252	10	2J, 6O, 10I
Of other vegetable fibres	34	7	..	6G, 6I
Unclassified	1,591	345	..	
Total new sacks and bags	42,190	3,076	..	

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CANVAS GOODS AND SACKS

TABLE 6 (contd.)

	1954			Principal industries in which produced (a)
	Quantity	Value	Entries	
	Th.	£'000	Number	
Second-hand sacks and bags, sorted, cleaned, repaired, etc., and sold (i.e., sold other than 'as rise')				
Of jute	10,211	556	25	8H, 10E
Made-up goods of sailcloth or canvas				
Of linen or hemp	..	307	23	6I, 7C, 7H
Of jute	..	68	6	5A, 6I, 10B, 11A
Of cotton				
Tents and marquees	..	246	6	7H, 10B
Tarpaulins, wagon sheets, rick covers and the like	..	66	7	4A, 6I, 7F, 11C
Other	..	302	10	6I, 6M, 6O, 7H.
Of other materials	..	158	6	6H, 7F, 7H, 10I
Finished brattice cloth				
Work done for the trade or on commission (b)				
Sacks and bags of jute made from customers' own materials	12,237	98	5	
Cleaning and repairing sacks, bags and other canvas goods and other work done	..	186	..	
Total		5,222	..	

(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
		£'000
Rope, twine and net, and manufactures thereof	..	226
Waterproofed piece goods		
Of cotton	..	135
Of jute	..	196
Of other materials	..	151
Other textile manufactures	..	354
Leather goods	..	71
Furniture (including bedding, soft furnishings and shop blinds)	..	65
Flags and banners of bunting	..	112
Light and heavy webbing other than of cotton	..	455
Other goods	..	553
Work done (a)		
Waterproofing	..	148
Other work done	..	260
Total		2,727

(a) Amount charged.

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

This table is not applicable to the industry.

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CANVAS GOODS AND SACKS
Purchases of materials and fuel, 1954
Larger establishments in the United Kingdom

TABLE 9

	Quantity	Cost
	Th. sq. yds.	£'000
Materials		
Jute piece goods		
Hessian	169,220	8,424
Other	8,941	932
Hemp piece goods	306	91
Linen canvas and sailcloth	6,941	1,952
Cotton piece goods	18,467	2,634
Thread	1,584	347
Cordage, ropes and twine	37	319
Second-hand sacks and bags	126,359	4,475
New sacks purchased for the purpose of printing to customers' requirements	12,039	697
Printing inks and paints	..	93
Linseed oil	35	169
Packing materials (for packing own products)	..	34
All other purchased materials	..	2,154
Fuel and electricity		
Coal	14	57
Coke	3	15
Liquid fuel (including creosote/pitch mixtures)		
For use in internal combustion engines		
Motor spirit (petrol) for use in road vehicles and derv. fuel	346	80
Other	8	1
For burning in furnaces, boilers, kilns, etc.	73	3
Gas purchased		
From Gas Boards and from other sources, including other departments of the same firms	237	16
Electricity purchased (a)		
From Electricity Boards	7,573	59
From other sources, including other departments of the same firms	310	2
All other purchased fuel	..	12
Total cost		28,029

(a) Owing to the risk of disclosure of information relating to individual firms the total quantity of electricity generated in firms' own establishments cannot be given.

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	11,939	12,790
Administrative, technical and clerical employees	1,845	2,094
Total	13,784	14,884
Wages and salaries paid to	£'000	£'000
Operatives	2,683	3,418
Administrative, technical and clerical employees	1,119	1,352
Total	3,802	4,770
Wages and salaries per head	£	£
Operatives	225	267
Administrative, technical and clerical employees	607	646
Superannuation and other pension funds for employees and dependents (b)		£'000
Employers' contributions	..	51
Employees covered	..	2,081
Pension, etc., payments to former employees and dependents (b)	..	£'000
		20

(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
	Number	Number
Canteen workers		
Male	1	-
Female	83	86
Total	84	86
Other workers		
Male	374	197
Female	185	144
Total	559	341
Total excluded employees	643	427

Outworkers. The firms in this industry employed 3 male and 92 female outworkers in 1951 and 4 male and 293 female outworkers in 1954, the amounts paid to them being £8,000 and £17,000 respectively.

(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		
	Number					
	Males	Females	Total	Males	Females	Total
Working proprietors	45	2	47	45	-	45
Operatives	3,483	8,526	12,009	3,505	9,200	12,705
Administrative, technical and clerical employees	1,133	723	1,856	1,267	838	2,105
Total employees	4,616	9,249	13,865	4,772	10,038	14,810

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

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