

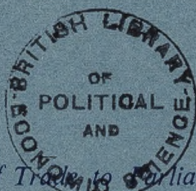
BOARD OF TRADE

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*The Report on the
Census of Production
for 1954*

Volume 9: Industry B

FISH CURING



*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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1957

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The Report on the Census of Production for 1954

VOLUME 9, INDUSTRY B

FISH CURING

THIS REPORT on the Fish Curing Industry relates to establishments engaged wholly or mainly in preserving fish by smoking, salting, dehydrating, pickling or quick-freezing.

This industry corresponds to minimum list heading 162(2) in the Standard Industrial Classification.

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

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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	Wales 1954
	1948	1951	1954		
	£ million	£ million	£ million	£ million	£ million
Gross output (production)	18.2	17.3	17.4	4.54	-
Net output	4.1	3.6	3.6	0.80	-
Total stocks and work in progress					
At beginning of year	0.8	1.3	1.6	0.37	-
Change during year	+ 0.2	+ 0.5	+ 0.1	- 0.13	-
Capital expenditure less disposals (a)	0.6	0.3	0.3	0.16	-
Wages and salaries	2.5	2.2	2.4	0.71	-
Total employment (including working proprietors)	Thousands 10.3	Thousands 7.9	Thousands 7.1	Thousands 2.67	Thousands 0.05

(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 (a)

TABLE 2 (i)

	Unit	Great Britain 1948	United Kingdom	
			1951	1954
FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS				
Number of establishments	No.	255	166	126
Total value of sales and work done	£'000	14,023	12,873	13,336
Products on hand for sale	at beginning of year change during year	359	753	905
and work in progress		.. + 44	+ 247	+ 53
Gross output (production) (b)	..	13,992	13,120	13,389
Purchases of materials and fuel	..	10,812	9,759	9,809
Stocks of materials and fuel	at beginning of year change during year	225	216	292
		.. + 79	+ 97	+ 36
Cost of materials and fuel used	..	10,733	9,662	9,773
Payment for work done on materials given out	..	6	5	13
Payment for transport (c)	..	74	778	789
Net output	..	3,252	2,674	2,814
Average number of employees	operatives others	No. 6,800	4,767	4,343
Total employment (e)		.. 1,031(d)	874	835
Net output per person employed (e)	..	7,948	5,718	5,228
Wages and salaries	of operatives of others	£'000 1,538	1,265	1,361
		.. 361	351	381
Capital expenditure				
New building work (f)	..	182	49	50
Plant and machinery	acquisitions (f) disposals	.. 171	121	122
		.. 3	13	10
Vehicles	acquisitions (f) disposals	.. 95	71	90
		.. 18	12	41

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

(b) 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.

(c) 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.

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

(e) Excluding outworkers and including working proprietors.

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

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Small firms in Great Britain (a)

TABLE 2 (ii)

	Unit	1948	1951	1954
Number of returns	No.	313	295	266
Gross output (sales)	£'000	3,520	3,082	3,203
Purchases of materials and fuel	"	2,770	2,442	2,597
Net output (b)	"	740	640	606
Total employment (c)	No.	1,952	1,619	1,548
Males	"	1,030	842	738
Females	"	922	777	810

(a) Firms employing on the average ten or fewer persons, that made satisfactory returns. In 1954 there were 5 small firms in Northern Ireland employing 28 persons (24 males and 4 females).

(b) The value of net output in this section is the difference between the value of gross output (sales) and the cost of materials and fuel purchased during the year less, for 1948 only, payment to other firms for transport services.

(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	64	2,516	486	897	134	271	64	36	458
25 - 49	36	2,607	490	996	129	288	65	34	429
50 - 99	21	4,487	917	1,321	218	420	111	124	595
100 - 999	5	3,778	921	1,129	354	383	141	68	621
Total	126	13,389	2,814	4,343	835	1,361	381	262	538

(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.

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

Larger establishments in the United Kingdom

No specialisation within this industry was distinguished.

FISH CURING

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	
Cured, smoked, salted, etc. fish	Th.cwt.	£'000	Th.cwt.	£'000	Number
White fish					
Smoked					
Whole, headless or split	217	1,506	125	902	57
			..	448	
Filletts	332	2,299	286	1,932	56
			..	525	
Salted					
Wet	35	139	39	152	11
Dry	165	901	115	627	14
Other white fish	43	281	(b)	(b)	(b)
	..	246			
Total white fish	791	5,127	566	3,612	..
	..	246	..	973	
Salmon and migratory trout (smoke cured)	11	765(c)	12	860	10
Other cured, smoked, salted, etc. fish					
Kippers, bloaters and bucklings (excluding Mediterranean cure)	709	3,205(d)	478	2,169	66
Salt (pickle) cured (including marinated herrings)	99	204(e)	165	354	14
Mediterranean cure (red and silver herrings)	136	397(f)	116	535	..
Other	31	145	9	47	8
			..	128	
Total other cured, smoked, salted, etc. fish	976	3,950	768	3,106	..
			..	128	
Quick frozen fish					
White fish					
Whole, headless or split	204	1,690	27	199	9
Filletts			214	1,958	21
Other	62	213	36	240	12
			..	1,146	
Waste products	..	295	..	508	95
Work done for the industry or on commission (g)		22		31	9
Total		12,309		12,760	..
Sales in other industries (see Table 6)		65		229	..
Principal products of this industry sold by establishments in the industry		12,244		12,531	115

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

(b) The heading 'Other white fish' was omitted from the schedule in 1954.

(c) Described as 'Salmon, smoked'.

(d) Described as 'Kippers, bloaters and bucklings'.

(e) Described as 'Salt (pickle) cured'.

(f) Described as 'Mediterranean cure (red herrings)'.

(g) Amount charged.

Total sales by small firms in Great Britain (a)

TABLE 5 (ii)

	1951		1954		Entries Number
	Quantity Th.cwt.	Value £'000	Quantity Th.cwt.	Value £'000	
Fish, cured, smoked or salted					
White fish (cod, codlings, haddocks, saithe, etc.)	291	1,637	233	1,578	157
Salmon and migratory trout (smoke cured)	3	122(b)	1	65	5
Other fish	395	1,026	322	848	141
Other products (including waste products)	..	207	..	231	176
Total		89	..	145	266
		3,082		3,203	

(a) Firms, employing on the average ten or fewer persons, that made satisfactory returns.
(b) Described as 'Salmon'.

TABLE 6 - Sales of principal products of the industry by establishments classified to other industries

Larger establishments in the United Kingdom

The total value of sales of principal products of this industry by establishments classified to other industries was £229,000.

Owing to the risk of disclosure of information relating to individual firms no further particulars can be given.

Sales in the industry of other than principal products

Larger establishments in the United Kingdom

TABLE 7

	1954	
	Quantity Th.cwt.	Value £'000
Fish cakes and fish in tins, glasses, etc.	61	483
Other goods	26	309
	..	13
Total		806

TABLE 8 - Total make of intermediate products

Larger establishments

This table is not applicable to the industry

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

TABLE 9

	Quantity	Cost
	Th.cwt.	£'000
Materials		
Fish purchased for curing, etc.		
White fish		
Fresh	1,403	3,238
Salted	88	265
Herrings		
Not pickled	974	1,340
Pickled	35	51
Salmon, migratory trout, eels and fresh water fish	16	664
Other fish	34	138
Unclassified	..	64
Salt	204	2,033
Packing materials	..	51
Wooden barrels, casks and kegs	41	7
Wooden packing cases	324	39
Transparent cellulose film bags, sheets or rolls	..	29
Other packing materials	..	110
All other purchased materials	..	303
Fuel and electricity		
Coal	3	38
Coke	3	298
Liquid fuels (including creosote/pitch mixtures)		
For use in internal combustion engines	280	373
For burning in furnaces, boilers, kilns, etc.	37	13
Gas purchased	157	13
Electricity purchased		
From Electricity Boards	7,544	11
From other sources, including other departments of the same firms	946	9
All other purchased fuel		5
Total cost		10
		9,809

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

Larger establishments in the United Kingdom

TABLE 10

	1951	1954
Average number of employees	Number	Number
Operatives	4,767	4,343
Administrative, technical and clerical employees	874	835
Total	5,641	5,178
Wages and salaries paid to	£'000	£'000
Operatives	1,265	1,361
Administrative, technical and clerical employees	351	381
Total	1,615	1,742
Wages and salaries per head	£	£
Operatives	265	313
Administrative, technical and clerical employees	402	456
Superannuation and other pension funds for employees and dependents		£'000
Employers' contributions	..	15
Employees covered	..	Number 570
Pension, etc. payments to former employees and dependents	..	£'000 19

(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		
Males	1	1
Females	33	33
Total	34	34
Other workers		
Males	215	87
Females	68	57
Total	283	144
Total excluded employees	317	178

Employment in a specified week (a)

Larger establishments in the United Kingdom

TABLE 11

	1951			1954		
	Males	Females	Total	Males	Females	Total
Working proprietors	75	2	77	46	4	50
Operatives	2,488	2,383	4,871	2,151	2,235	4,386
Administrative, technical and clerical employees	440	445	885	358	462	820
Total employees	2,928	2,828	5,756	2,509	2,697	5,206

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

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