

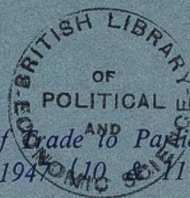
BOARD OF TRADE

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*The Report on the
Census of Production
for 1954*

Volume 9: Industry I

WHOLESALE BOTTLING



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 9, INDUSTRY I

WHOLESALE BOTTLING

THIS REPORT on the Wholesale Bottling Industry relates to establishments engaged wholly or mainly in the wholesale bottling of beer, wines, spirits, mineral waters, etc. (but not milk, for which see the report on the Milk Products Industry, Volume 8, Industry F). Separate bottling establishments maintained by brewers and distillers, and whisky blenders who are not distillers are included.

Some brewing firms that maintained bottling establishments were unable to furnish separate returns for the latter and, therefore, included their bottling departments in the general returns for the breweries.

This industry corresponds to minimum list heading 164 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	9/I/3	6	Sales of principal products of the industry by establishments classified to other industries	9/I/6
2	Summary of returns received	9/I/3	7	Sales in the industry of other than principal products	9/I/6
3	Analysis by size, 1954	9/I/4	8	Total make of intermediate products	Does not apply
4	Analysis according to specialisation within the industry, 1954	9/I/4	9	Purchases of materials and fuel, 1954	9/I/7
5	Sales of principal products of the industry, including sales of these products by establishments classified to other industries	9/I/5	10	Average number of employees and wages, salaries and superannuation payments	9/I/8
			11	Employment in a specified week	9/I/8

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	Wales 1954
	1948	1951	1954		
	£ million	£ million	£ million	£ million	£ million
Gross output (production)	149.1	179.2	214.2	69.67	5.24
Net output	29.1	40.9	46.9	20.26	1.17
Total stocks and work in progress					
At beginning of year	39.0	58.1	79.8	57.42	0.29
Change during year	+ 7.9	+ 9.2	+ 6.3	+ 5.77	+ 0.01
Capital expenditure less disposals (a)	1.6	3.1	3.4	0.62	0.11
Wages and salaries	8.2	10.3	12.7	3.05	0.27
Total employment (including working proprietors)	Thousands 30.0	Thousands 31.6	Thousands 32.7	Thousands 8.40	Thousands 0.80

(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.	502	501	498
Total value of sales and work done	£'000	125,128	155,037	187,781
Products on hand for sale	{at beginning of year	25,900	43,978	59,590
and work in progress	{change during year	+ 6,119	+ 6,284	+ 4,758
Gross output (production) (a)		130,325	161,320	192,538
Purchases of materials and fuel		75,624	90,028	104,141
Stocks of materials and fuel	{at beginning of year	8,200	8,294	12,186
	{change during year	+ 814	+ 1,959	+ 885
Cost of materials and fuel used		74,810	88,069	103,256
Payment for work done on materials given out		229	385	353
Payment for transport (b)		922	1,631	2,464
Customs and Excise duties (net)		29,868	34,366	44,269
Net output		25,418	36,870	42,195
Average number of employees	{operatives	21,077	22,455	22,860
	{others	5,143(c)	5,965	6,504
Total employment (d)		26,264	28,483	29,433
Net output per person employed (d)	£	968	1,294	1,434
Wages and salaries	{of operatives	£'000 4,744	6,027	7,454
	{of others	2,452	3,253	3,985
Capital expenditure				
New building work (e)		95	594	652
Plant and machinery	{acquisitions (e)	1,026	1,831	1,784
	{disposals	31	44	38
Vehicles	{acquisitions (e)	331	417	336
	{disposals	45	49	66
FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS				
Number of returns	No.	490	480(f)	497
Total employment, including working proprietors		3,037	2,939(f)	3,118

(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.

Analysis by size, 1954

Larger establishments in the United Kingdom

TABLE 3

Average number employed (a)	Establishments	Gross output £'000	Net output £'000	Employees		Wages and salaries		Capital expenditure (b) £'000	Net output per person employed (a) £
				Operatives	Others	Operatives	Others		
	Number	£'000	£'000	Number	Number	£'000	£'000	£'000	£
11 - 24 (c)	181	15,845	2,567	2,082	738	634	396	262	901
25 - 49	157	29,209	5,642	4,130	1,324	1,275	709	414	1,029
50 - 99	97	40,889	7,964	5,455	1,418	1,695	868	902	1,157
100 - 199	37	31,577	7,614	4,253	1,096	1,417	670	521	1,423
200 - 299	10	16,530	2,450	1,785	502	698	342	198	1,071
300 - 749	16	58,488	15,958	5,155	1,426	1,735	1,001	475	2,425
Total	498	192,538	42,195	22,860	6,504	7,454	3,985	2,772	1,434

(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 number of establishments with fewer than 11 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 bottlers			Remainder of the industry	Total
		Of beer	Of wine and spirits	On commission		
Number of establishments	No.	310	152	17	19	498
Total value of sales and work done	£'000	87,665	96,828	1,324	1,964	187,781
Sales of characteristic products	"	82,685	90,155	1,229 (a)	-	174,069
Products on hand for sale	{	3,372	56,037	-	182	59,590
and work in progress	{	60	4,699	-	1	4,758
Gross output (production)	"	87,725	101,527	1,324	1,963	192,538
Purchases of materials and fuel	"	69,819	32,836	524	961	104,141
Stocks of materials	{	3,572	8,342	(b)	(b)	12,186
and fuel	{	57	796	23	9	885
Cost of materials and fuel used	"	69,762	32,040	501	953	103,256
Payment for work done on materials given out	"	41	313	-	-	353
Payment for transport	"	937	1,507	15	5	2,464
Customs and Excise duties (net)	"	391	43,561	-	317	44,269
Net output	"	16,496	24,105	808	786	42,195
Average number of employees	{	13,545	7,292	1,003	1,020	22,860
	{	3,083	3,117	134	170	6,504
Total employment (c)	"	16,667	10,425	1,137	1,204	29,433
Net output per person employed (c)	£	990	2,312	711	653	1,434
Wages and salaries	{	4,538	2,287	308	320	7,454
	{	1,655	2,155	81	94	3,985
Capital expenditure	"					
New building work (d)	"	255	358	8	32	652
Plant and machinery	{	1,414	286	50	34	1,784
	{	31	4	2	1	38
Vehicles	{	158	171	1	6	336
	{	16	49	-	1	66

(a) Amount charged.

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

(c) Excluding outworkers and including working proprietors.

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

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

NOTE - The value of liquors for home consumption is inclusive of duty, while that of liquors for export was recorded less drawback.

TABLE 5

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
Liquors purchased and bottled	Th.gal.	£'000	Th.gal.	£'000	Number
Beer (including ale, stout, porter, etc.)					
For home consumption	149,705	90,541	169,752	106,854	490
For export	7,248	3,122	6,141	3,000	19
Unclassified	284	184	178	123	14
Total beer	157,237	93,846	176,071	109,977	..
Wine imported					
Delivered for home consumption	5,030	18,947	5,999	21,604	338
For export	322	689	477	1,035	18
Other (sold duty-free)	38	26	76	72	14
British Wines (Sweets)	1,055	1,616	1,574	2,531	168
Total wine	6,445	21,278	8,126	25,242	..
Spirits	Th.proof gal.		Th.proof gal.		
Whisky					
Delivered for home consumption	2,116	27,191	3,232	39,816	165
For export	7,815	21,425	9,300	25,134	53
Other (sold duty-free)	415	875	442	982	32
Gin					
Delivered for home consumption	129	1,590	125	1,424	101
For export	92	157	67	109	11
Other British compounds					
Delivered for home consumption	7	92	13	190	36
Other spirits					
Delivered for home consumption	573	7,485	544	6,760	153
For export	220	319	182	296	14
Other (sold duty-free)	23	32	104	73	15
Unclassified spirits					
Delivered for home consumption	789	9,147	617	7,792	141
Other (sold duty-free)	56	158	78	135	15
Total spirits	12,235	68,471	14,704	82,711	..
Alcoholic cider and perry	Th.gal.	742	Th.gal.	585	167
Other liquors (including soft drinks and vinegar)	1,542	1,069	2,261	1,004	246
Goods made	Th.proof gal.		Th.proof gal.		
Blended whisky unbottled					
Delivered for home consumption	184	2,089	117	1,328	19
For export	559	1,167	538	1,182	24
Other (sold duty-free)	2,049	1,303	2,279	1,792	20
Bottling done on commission (a)		1,497		1,792	54
Total		191,462		225,614	..
Sales in other industries (see Table 6)		38,570		41,336	..
Principal products of this industry sold by establishments in the industry		152,892		184,277	410

(a) Amount charged.

Sales of principal products of the industry by establishments classified to other industries
Larger establishments in the United Kingdom

NOTE - The value of liquors for home consumption is inclusive of duty, while that of liquors for export was recorded less drawback.

TABLE 6

	1954			Principal industries in which produced (a)
	Quantity	Value	Entries	
	Th.gal.	£'000	Number	
Liquors purchased and bottled				
Beer (including ale, stout, porter, etc.)				
For home consumption	37,225	26,300	214	9H
For export	68	25	..	9H
Unclassified	178	123	14	9H, 9L
Total beer	37,471	26,448	..	
Wine (imported)	917	3,844	154	9H, 9K, 9L
British Wines (Sweets)	369	688	38	9K, 9L
Total wine	1,286	4,532	..	
Spirits	Th.proof gal.			
Delivered for home consumption				
Whisky	65	673	7	9K
Other spirit	22	271	5	9K
Unclassified	617	7,792	141	9H, 9L
For export, and other (sold duty free)	297	480	23	9H, 9L
Total spirits	1,001	9,216	..	
Alcoholic cider and perry	Th.gal.			
	922	252	63	9H, 9L
Other liquors (including soft drinks and vinegar) purchased and bottled, and bottling done on commission	1,603	735	202	8J, 9H
	..	154		
Total		41,336	..	

(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

NOTE - The value of liquors for home consumption is inclusive of duty, while that of liquors for export was recorded less drawback

TABLE 7

	1954	
	Quantity	Value
	Th.gal.	£'000
Soft drinks made		
Concentrated		
In liquid form (including squashes and cordials and unsweetened concentrated drinks)	307	167
Unconcentrated		
Soda water	205	37
Sweetened including non-alcoholic cider	4,931	814
Other soft drinks	555	118
Other drinks made		
Beer, spirits rectified or compounded and other British compounds	..	1,519*
Other goods made	..	202
Work done other than bottling (a)		646
Total		3,503

(a) Amount charged.

(86222)

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

	Quantity	Cost
	Th.gal.	£'000
Materials		
Liquors		
Beer (including ale, stout, porter, etc.)		
Home produced	133,001	60,212
Imported	6,531	3,190
Wine, imported	5,875	5,365
British Wines (Sweets)	1,119	977
Spirits	Th.proof gal.	
Home produced	28,992	17,667
Imported	662	668
Cider and perry	Th.gal.	
Other liquors	1,172	211
Other liquors	289	102
Bottles and packing materials		
Bottles	..	4,232
Wooden barrels, casks and kegs	Thousands 396.6	1,145
Packing cases (wood or mainly of wood)	Th.cu.ft. of timber 1,143	1,214
Timber for the manufacture or reconditioning of casks, cases, etc.	..	610
	246	187
	..	136
Fibre-board packing cases	Th.cwt. 261	232
Closures of all kinds (e.g. bungs, crowns and corks)	..	149
Other packing materials including metal crates and paper labels	..	2,325
Replacement parts for machinery, plant and vehicles and consumable tools bought as replacements	..	1,609
All other purchased materials	..	821
Fuel and electricity	Th.tons	
Coal	44.2	183
Coke	17.9	100
Liquid fuels (including creosote/pitch mixtures)	Th.gal.	
For use in internal combustion engines		
Motor spirit (petrol) for use in road vehicles and derv. fuel	2,394	469
Other	33	3
For burning in furnaces, boilers, kilns, etc.	1,659	66
Gas purchased from Gas Boards	Th.therms 871	55
Electricity purchased (a)	..	13
From Electricity Boards	Th.kWh. 34,589	249
From other sources, including other departments of the same firms	..	31
All other purchased fuel	3,440	8
	..	11
	..	9
Total cost		104,141

(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.

(86222)

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	22,455	22,860
Administrative, technical and clerical employees	5,965	6,504
Total	28,420	29,364
	£'000	£'000
Wages and salaries paid to		
Operatives	6,027	7,454
Administrative, technical and clerical employees	3,253	3,985
Total	9,280	11,439
	£	£
Wages and salaries per head		
Operatives	268	326
Administrative, technical and clerical employees	545	613
Superannuation and other pension funds for employees and dependents (b)		£'000
Employers' contributions	..	463
Employees covered	..	Number 12,499
Pension, etc. payments to former employees and dependents (b)	..	£'000 165

(a) The following persons not included above were also employed by larger establishments in this industry ('other workers' included for example, employees engaged in merchanting).

	1951	1954
	Number	Number
Canteen workers		
Male	10	9
Female	241	270
Total	251	279
Other workers		
Male	1,408	1,452
Female	508	543
Total	1,916	1,995
Total excluded employees	2,167	2,274

(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	57	6	63	60	9	69
Operatives	12,001	10,916	22,917	12,426	11,110	23,536
Administrative, technical and clerical employees	4,106	1,878	5,984	4,336	2,237	6,573
Total employees	16,107	12,794	28,901	16,762	13,347	30,109

(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.)
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- H. Printing and Bookbinding Machinery
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- A. Tool and Implement
- B. Cutlery
- C. Chain, Nail, Screw and Miscellaneous Forgings
- D. Wire and Wire Manufactures
- E. Hardware, Hollow-ware, Metal Furniture and Sheet Metal
- F. Brass Manufactures
- G. Needles, Pins, Fish Hooks and Metal Smallwares
- H. Scientific, Surgical and Photographic Instruments, etc.
- I. Watch and Clock
- J. Jewellery and Plate
- K. Precious Metals Refining
- L. Musical Instruments

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- A. Cotton Spinning and Doubling
- B. Cotton Weaving
- C. Woollen and Worsted
- D. Rayon, Nylon, etc. Production
- E. Rayon, Nylon, etc. Weaving, and Silk
- F. Flax Processing
- G. Linen and Soft Hemp
- H. Jute
- I. Rope, Twine and Net
- J. Hosiery and Other Knitted Goods
- K. Lace
- L. Carpets
- M. Narrow Fabrics
- N. Canvas Goods and Sacks
- O. Textile Converting
- P. Made-up Household Textiles
- Q. Textile Finishing
- R. Textile Packing

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- B. Flock and Rag
- C. Hair, Fibre and Kindred Industries
- D. Leather (Tanning and Dressing)
- E. Feltmongery
- F. Leather Goods
- G. Fur
- H. Tailoring, Dressmaking, etc.
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- J. Glove
- K. Umbrella and Walking Stick
- L. Boot and Shoe

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- A. Grain Milling
- B. Bread and Flour Confectionery
- C. Biscuit
- D. Bacon Curing and Sausage

VOLUME 8 (contd.)

- E. Preserved Meat
- F. Milk Products
- G. Ice Cream
- H. Sugar and Glucose
- I. Cocoa, Chocolate and Sugar Confectionery
- J. Preserved Fruit and Vegetables

VOLUME 9

- A. Margarine
- B. Fish Curing
- C. Cattle, Dog and Poultry Foods
- D. Vinegar and Other Condiments
- E. Starch
- F. Ice
- G. Miscellaneous Preserved Foods
- H. Brewing and Malting
- I. Wholesale Bottling
- J. Spirit Distilling
- K. Spirit Rectifying and Compounding
- L. Soft Drinks, British Wines and Cider
- M. Tobacco

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- A. Timber
- B. Furniture and Upholstery
- C. Soft Furnishings
- D. Shop and Office Fitting
- E. Wooden Containers and Baskets
- F. Paper and Board
- G. Wallpaper
- H. Cardboard Box, Carton and Fibre-board Packing Case
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- J. Newspaper and Periodical Printing and Publishing
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- B. Linoleum, Leathercloth and Allied Industries
- C. Brushes and Brooms
- D. Toys and Games
- E. Sports Requisites
- F. Miscellaneous Stationers' Goods
- G. Cinematograph Film Production
- H. Cinematograph Film Printing
- I. Plastic Goods and Fancy Articles
- J. Incandescent Mantles

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- B. Local Authorities (Building and Civil Engineering)
- C. Railways (Civil Engineering)
- D. Tramway, Trolley Bus and Omnibus Undertakings (Civil Engineering)
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