

**THE BUTTER, CHEESE, CONDENSED MILK AND
MARGARINE TRADES.**

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Introductory.*

The Tables on pages 112 to 116 are based on Returns received from firms in Great Britain and Northern Ireland whose business in 1924 consisted wholly or mainly in the manufacture of butter, cheese, condensed milk and margarine. The number of such separate Returns was 481. Fifty-seven firms to which schedules were sent did not furnish Returns, but the majority of these firms had very small establishments and some were no longer in operation at the end of the censal year. On the basis of the information available, it is estimated that they did not employ more than 250 persons in all and that their total net output was probably not in excess of £90,000.

Summary of results.—The following table shows the main results of the Censuses of 1924 and 1907, comparisons between the figures for the two years being subject to the qualifications mentioned in the next paragraph. Particulars relating to the Census of 1912 have been, in general, omitted for the reasons stated in that paragraph.

* See also the Notes on pages vii-xiv.

Particulars.	Unit.	1924.	1907.
Value of goods made and work done (Gross output)	£'000	26,126	10,164
Cost of materials used	"	21,560	8,996
Net output	"	4,566	1,168
Average number of persons employed	No.	12,051	9,333
Net output per person employed	£	379	125
Mechanical power available:—			
Prime movers	H.P.	24,406	11,372
Electric motors driven by purchased electricity	"	5,365	(not recorded)

Qualifications affecting comparisons.—In considering the above table and the other tables in this Report which show figures for the two censal years, the following qualifications should be borne in mind:—

(1) The comparability of figures relating to value or cost is affected by the changes which have taken place in the general purchasing power of money.

(2) The Census of 1907 covered the whole of Great Britain and Ireland, but that of 1924 applied only to Great Britain and Northern Ireland. According to the Census of Production taken by the Government of the Irish Free State in respect of the year 1926, the total value of the goods made and work done in these trades in that year was returned as £6,331,000, together with £1,035,000 for eggs purchased and packed, and the average number of persons employed (inclusive of egg packers) as 3,600.

(3) The Censuses of 1907 and 1924 extended to all firms, however small, but in 1912, firms employing not more than five persons (excluding the proprietors) were merely required to state the average number of persons employed by them in the year. According to the information so furnished, the average number of persons employed in the establishments thus excluded was 1,654 or 16 per cent. of the number employed by the remaining firms. The proportion of output excluded in this way is sufficiently large to invalidate comparisons, and, consequently, the relative information obtained for 1912 is not dealt with in this Report.

(4) This Report does not include production on farms or the butter, cheese and other products made by dairies whose main business consisted in the distribution of milk (see below, page 107).

(5) As regards the output of co-operative creameries in Northern Ireland, only central creameries are covered, the particulars obtained from independent and controlled auxiliary creameries not being sufficiently complete to enable reliable estimates to be made of the business of these establishments as a whole. The output of auxiliary creameries is, however, substantially covered by that of the central creameries.

(6) This Report also excludes whole milk and fresh pork sold by dairies. Sales of these goods have been deducted from the

total value of the output and from the cost of materials used, and the latter figure is, accordingly, understated by the amount of the profit on such sales. The error so introduced is, however, unimportant.

Production.

Detailed information as to the output of the Butter, Cheese, Condensed Milk and Margarine Trades in 1924 will be found in Table II on page 113.

Output of creameries and factories.—The following table affords a comparison of the output of butter, cheese, other milk products, and margarine from creameries and factories in 1924 and 1907, including, for 1924, the amount received for blending butter on commission; this amount cannot be stated separately as the work was shown in the Return of one firm only. It must be emphasised that the absence of Returns from the Irish Free State in 1924 seriously affects the validity of comparisons between the figures for the two years. No output of similar products was recorded on schedules for other trades in either year.

Kind of products.	1924.		1907.	
	Quantity.	Selling value.	Quantity.	Selling value.
	Th. cwts.	£'000.	Th. cwts.	£'000.
Butter:—				
Made at creameries	102	1,004	} 1,100	5,840
Purchased and blended	676	6,553		
TOTAL—BUTTER	778	7,557	1,100	5,840
Cheese:—				
Hard	131	569	} 75	193
Soft	17	153		
.. .. . { Weight not stated .. .. .	..	48		
TOTAL—CHEESE .. .. .	..	770	75	193
Margarine and margarine cheese	3,670	10,294	881	2,094
	Th. Imp. galls.		Th. Imp. galls.	
Cream sold	1,866	1,426	1,098	398
Separated milk sold	9,194	130	..	113
	Th. cwts.			
Condensed milk	783	2,932	..	1,217
Milk powder	123	671	} ..	112
Other milk products and amount received for blending butter on commission .. .. .	..	507		
TOTAL VALUE .. .. .	..	24,287	..	9,967

In 1907 the firms making Returns were asked to state voluntarily the separate quantities of butter made and of butter blended by them. The particulars furnished are shown below in comparison with those for 1924 and with those for the Irish Free State for 1926.

At creameries and factories.	Great Britain.		Northern Ireland.	Irish Free State.	Ireland.
	1924.	1907.	1924.	1926.	1907.
	Th. cwts.	Th. cwts.	Th. cwts.	Th. cwts.	Th. cwts.
Butter made	46	46	56	568	436
Butter blended	676	350	—	149	164
Particulars not stated ..	—	26	—	—	78
TOTAL RETURNED ..	722	422	56	717	678

While the output of creamery butter in Great Britain was no greater in 1924 than in 1907 and may have declined, there was a very large increase (at least 80 per cent.) in the quantity of butter purchased from farmers or imported and blended at creameries or factories. The output of cheese also more than doubled in the period.

Output of creameries, factories and farms.—The output of butter, cheese, and cream returned to the Census formed only a part of the total output of these products in the United Kingdom. Utilising the information as to farmers' production in 1924-5 given in the Reports on The Agricultural Output of England and Wales (Cmd. 2815), of Scotland (Cmd. 3191), and of Northern Ireland (Cmd. 87), we obtain the following statement:—

Kind of products.	England and Wales.	Scotland.	Northern Ireland.	United Kingdom.
	Th. cwts.	Th. cwts.	Th. cwts.	Th. cwts.
Butter:—				
Made on farms	569	52	124	745
Made in creameries	39	7	56	102
TOTAL	608	59	180	847
Cheese:—				
Made on farms	502	146	†	648
Made in creameries	122*	31	—	153*
TOTAL	624*	177	†	801*
Cream:—				
Sold off farms	650	206	(not stated)	..
Sold at creameries	1,421	428	17	1,866
TOTAL	2,071	634	..	..

* Including an estimate for the weight of some soft cheese returned by value only.
† Very small.

Exports and imports of butter and cheese.—Exports of British butter in 1924 were about 20,000 cwts. and of British cheese about 7,500 cwts. Retained imports of butter were 5,096,000 cwts. of which 461,000 cwts. were consigned from the Irish Free State, and those of cheese were 2,840,000 cwts., of which 5,000 cwts. were from the Irish Free State. United Kingdom producers, therefore, supplied in

1924 only about 14* per cent. of the butter and 23* per cent. of the cheese available in this country. In 1907 the retained imports of butter were 4,127,000 cwts. and the retained imports of cheese were 2,320,000 cwts.

Output of milk distributors.—A number of Returns were received from firms whose main business consisted in milk distribution, and the statement below gives details of the products manufactured by them. These particulars are excluded both from the other tables contained in this Report and from Table II on page 113.

Goods made by milk distributors.	England and Wales.		Scotland.		Great Britain.	
	Quantity.	Selling value.	Quantity.	Selling value.	Quantity.	Selling value.
	Th. cwts.	£'000.	Th. cwts.	£'000.	Th. cwts.	£'000.
Butter:—						
Made at creameries ..	3	27	3	38	6	65
Purchased and blended	4	39	2	22	6	61
TOTAL—BUTTER ..	7	66	5	60	12	126
Cheese:—						
Hard	41	182	19	46	60	228
Soft	1	6	—	—	1	6
TOTAL—CHEESE ..	42	188	19	46	61	234
Cream sold	Th. Imp. galls. 362	156	Th. Imp. galls. 69	39	Th. Imp. galls. 431	195

Margarine.—The development of the manufacture of margarine in Great Britain since 1907 has been remarkable, as the following figures show:—

Year.	Production.	Exports.	Net imports.	Available for consumption in the United Kingdom.	Proportion of home market held by U.K. products.
	Th. cwts.	Th. cwts.	Th. cwts.	Th. cwts.	Per cent.
1907	881	18	878	1,741	49·6
1912	1,611	27	1,346	2,930	54·1
1924	3,670	43	1,312	4,939	73·4

It should be noted that the exports and imports include under margarine "any article of food, whether mixed with butter or not, which resembles butter, and is not milk-blended butter"; small quantities of margarine cheese are also included in the above figures.

In 1924 there was available for consumption 14·8 lb. of butter and 12·3 lb. of margarine per head of the population of Great Britain and Northern Ireland. In 1907 the quantity available in

* For the purpose of calculating these figures, account has been taken of the output recorded by milk distributors as shown in the next paragraph. As explained in that paragraph, this output is but a part of the total production of butter and cheese by such firms, and the percentages here quoted, therefore, slightly understate the proportions of butter and cheese available from United Kingdom sources.

Great Britain and the whole of Ireland was approximately 13 lb. of butter and about 4.5 lb. of margarine per head; the quantity of butter consumed has been calculated on the assumption that the consumption on farms, of which there is no record in 1907, was the same in that year as in 1924.

Condensed milk and milk powder.—The production of condensed milk and milk powder in the United Kingdom in 1924 was confined to Great Britain. Particulars for 1907 were not shown separately, in order to avoid disclosure of the business of individual firms.

The output of condensed milk in 1924 was 783,000 cwts. and the output in 1912 was 731,000 cwts. Details of the kinds of condensed milk cannot be given owing to the risk of disclosing the business of individual firms, but it may be said that over two-thirds of the output in 1924 was sweetened condensed milk made from whole milk, about one-eighth was sweetened condensed milk made from separated or skimmed milk, and nearly one-fifth was condensed milk not sweetened; the exports were 98,000 cwts. of which 20,000 cwts. were not sweetened; the retained imports were 2,182,000 cwts., namely, 314,000 cwts. sweetened, whole milk, 1,478,000 cwts. sweetened, separated or skimmed milk, and 390,000 cwts. not sweetened. The available supply of sweetened condensed milk made from separated or skimmed milk, was thus mainly derived from importation. The total quantity of condensed milk of all kinds available for consumption in the United Kingdom in 1924 was 2,867,000 cwts., of which 23.9 per cent. was made in Great Britain.

The production of milk powder in 1924 was recorded as 123,000 cwts.: exports amounted to 6,000 cwts. and retained imports to 84,000 cwts. The quantity available for home consumption cannot be deduced from these particulars since the trade figures did not take account of preparations which consisted mainly of dried milk. Since 1929 such preparations, if they contain 70 per cent. or more of dried milk, have been included with milk powder in the trade accounts.

Other products.—In addition to the output shown in the table on page 105, firms that made their Returns on schedules for the Butter, Cheese, Condensed Milk and Margarine Trades produced in 1924 the goods shown in the following statement. These goods, being of kinds mainly produced in other trades, are dealt with in the Reports on those trades:—

	£'000.
Lard and lard compound*	1,226
	(Th. cwts.) (342)
Oils, fats and greases (including suet and dripping)	491
Other goods	122
TOTAL	1,839

The corresponding total for 1907 was £197,000.

* See the Report on the Oil and Tallow Trades which forms part of a separate volume.

Cost of materials.—The cost of materials used by firms making their Returns on schedules for the Butter, Cheese, Condensed Milk and Margarine Trades was returned as £21,560,000 in 1924, the corresponding figure for 1907 being £8,996,000. These firms were also asked to state voluntarily the quantities of milk and cream used by them, but the replies received did not cover a sufficient proportion of the butter and cheese trade to provide a basis for general calculations.

Net output.—The net output in 1924 of the firms making their Returns on schedules for the Butter, Cheese, Condensed Milk and Margarine Trades (whose gross output was valued at £26,126,000) was £4,566,000, that sum representing, without duplication, the total amount by which the value, as delivered, of the aggregate output exceeded the cost, as purchased, of the materials used.

The net output per head of persons employed in the censal year 1924 was £379 as compared with £125 in 1907.

Wages in 1924.

Under the Census of Production Act, 1906, the powers of the Board of Trade to require information do not extend to particulars of the amount of wages paid, and, consequently, no information on this head was secured in connexion with the Census of 1924. As a result, however, of the voluntary enquiry undertaken by the Ministry of Labour into wages and hours in the United Kingdom in 1924, information was obtained as to the total wage-bill of a group of firms in the Butter, Cheese, Condensed Milk and Margarine Trades which made Returns both to the Ministry of Labour and to the Census of Production Office. According to the Census records this group of firms employed, in the week ended 18th October, 1924, 5,615 operatives, or 60 per cent. of the total of 9,295 operatives for the trades as a whole, and their net output totalled £2,622,000, or 57 per cent. of the aggregate net output of £4,566,000 for the trades as a whole. The total wage-bill of these firms, as returned to the Ministry of Labour, was £714,000, representing about 27 per cent. of their aggregate net output.

Employment.

The detailed information relating to employment in 1924 is summarised in Table III on pages 114–115. The following table sets out certain particulars for that year together with those obtained for the 1907 Census. For the purpose of this comparison, the average numbers of operatives of each sex returned for 1924 have been divided between the two age-groups in the proportion shown by the data relating to the week ended 18th October.

Average number.	Males.		Females.		Males and females.	
	Under 18.	All ages.	Under 18.	All ages.	Under 18.	All ages.
1924.						
Operatives	489	6,185	667	2,977	1,156	9,162
Administrative, etc. ..	101	2,042	74	847	175	2,889
TOTAL	590	8,227	741	3,824	1,331	12,051
1907.						
Wage earners	603	5,881	427	1,873	1,030	7,754
Salaried	97	1,426	8	153	105	1,579
TOTAL	700	7,307	435	2,026	1,135	9,333

The numbers of operatives recorded month by month in 1924 ranged from 244 above the average, in September, to 287 below the average, in March (see Table III B, page 115).

Mechanical Power.

The detailed information relating to mechanical power in 1924 is summarised in Table IV on page 116. The following table sets out the particulars for 1924 and 1907 relating to the capacity and kinds of *prime movers* and the capacity of *electric generators* installed.

Power equipment.	1924.			1907.
	Ordinarily in use.	In reserve or idle.	Total.	Total.
PRIME MOVERS :—	H.P.	H.P.	H.P.	H.P.
Reciprocating steam engines ..	11,519	4,206	15,725	9,376
Steam turbines	2,730	2,680	5,410	333
Gas engines	1,549	176	1,725	1,088
Petrol and light oil engines ..	981	199	1,180	
Heavy oil engines	221	—	221	
Water power	145	—	145	543
Other	—	—	—	32
TOTAL	17,145	7,261	24,406	11,372
ELECTRIC GENERATORS :—	Kw.	Kw.	Kw.	Kw.
Driven by—				
Reciprocating steam engines ..	3,991	1,988	5,979	793
Steam turbines	2,000	2,000	4,000	—
Gas engines	113	65	178	45
Petrol and light oil engines ..	20	—	20	
Heavy oil engines	5	—	5	
Water power	54	20	74	
Other prime movers	—	—	—	—
TOTAL	6,183	4,073	10,256	838

The capacity of *electric motors* recorded in 1924 was as shown below :—

Electric motors.	1924.		
	Ordinarily in use.	In reserve or idle.	Total.
	H.P.	H.P.	H.P.
Driven by—			
Electricity generated in own works ..	11,537	1,763	13,300
Purchased electricity	4,940	425	5,365

Corresponding information was not required for 1907. The total number of Board of Trade units of electricity purchased for power and lighting purposes in that year was returned as 268,000.

TABLES.

I.—Summary of results.

Particulars.	Unit.	England and Wales.	Scotland.	Great Britain.	Northern Ireland.
Value of goods made and work done (Gross output)	£'000	23,803	1,759	25,562	564
Cost of materials used	"	19,615	1,436	21,051	509
Net output	"	4,188	323	4,511	55
Average number of persons employed	No.	10,896	859	11,755	296
Net output per person employed ..	£	384	376	384	187
Mechanical power available :—					
Prime movers	H.P.	21,313	2,091	23,404	1,002
Electric motors driven by purchased electricity	"	5,097	238	5,335	30

II.—Production.

Output sold or added to stock and work done.	Unit.	England and Wales.	Scotland.	Great Britain.	Northern Ireland.
Butter :—					
Made at creameries ..	<i>Th. cwts.</i>	39	7	46	56
Purchased and blended	<i>£'000</i>	375	77	452	552
	<i>Th. cwts.</i>	673	3	676	—
	<i>£'000</i>	6,520	33	6,553	—
TOTAL—BUTTER	<i>Th. cwts.</i>	712	10	722	56
	<i>£'000</i>	6,895	110	7,005	552
Cheese :—					
Hard	<i>Th. cwts.</i>	100	31	131	†
	<i>£'000</i>	481	88	569	§
Soft	<i>Th. cwts.</i>	17	—	17	—
	<i>£'000</i>	153	—	153	—
	<i>£'000</i>	48	—	48	—
TOTAL VALUE—CHEESE	<i>£'000</i>	682	88	770	§
Margarine and margarine cheese	<i>Th. cwts.</i>	3,348	322	3,670	—
	<i>£'000</i>	9,215	1,079	10,294	—
Cream sold	<i>Th. Imp. galls.</i>	1,421	428	1,849	17
	<i>£'000</i>	1,109	305	1,414	12
Separated milk sold	<i>Th. Imp. galls.</i>	7,784	1,380	9,164	30
	<i>£'000</i>	108	22	130	§
Condensed milk	<i>Th. cwts.</i>	783	—	783	—
	<i>£'000</i>	2,932	—	2,932	—
Milk powder	<i>Th. cwts.</i>	*	*	123	—
	<i>£'000</i>	*	*	671	—
Other milk products	<i>£'000</i>	491	3	494	—
Lard and lard compound	<i>Th. cwts.</i>	*	*	342	—
	<i>£'000</i>	*	*	1,226	—
Oils, fats and greases (including suet and dripping)	<i>£'000</i>	*	*	491	—
Soups, potted and cooked meats, etc.	"	*	*	66	—
Bacon	<i>Th. cwts.</i>	*	*	2	—
	<i>£'000</i>	*	*	8	—
Other products and work done	<i>£'000</i>	61	—	61	—
TOTAL VALUE OF GOODS MADE AND WORK DONE (GROSS OUTPUT)	<i>£'000</i>	23,803	1,759	25,562	564

* In order to avoid the possible disclosure of information relating to individual firms, figures are given only for Great Britain as a whole.

† Less than 500 cwts. § Less than £500.

III.—Employment.

A.—NUMBERS EMPLOYED IN WEEK ENDED 18TH OCTOBER, 1924.

Kind of staff.	Males.		Females.		Males and females.	
	Under 18.	All ages.	Under 18.	All ages.	Under 18.	All ages.
<i>England and Wales :—</i>						
Operatives	467	5,559	650	2,851	1,117	8,410
Administrative, etc.*	90	1,827	68	753	158	2,580
TOTAL	557	7,386	718	3,604	1,275	10,990
<i>Scotland :—</i>						
Operatives	14	447	45	202	59	649
Administrative, etc.*	8	160	6	85	14	245
TOTAL	22	607	51	287	73	894
<i>Great Britain :—</i>						
Operatives	481	6,006	695	3,053	1,176	9,059
Administrative, etc.*	98	1,987	74	838	172	2,825
TOTAL	579	7,993	769	3,891	1,348	11,884
<i>Northern Ireland :—</i>						
Operatives	8	179	2	57	10	236
Administrative, etc.*	3	55	—	9	3	64
TOTAL	11	234	2	66	13	300
<i>United Kingdom :—</i>						
TOTAL	590	8,227	771	3,957	1,361	12,184

* Administrative, technical and clerical staff.

B.—OPERATIVES EMPLOYED IN ONE WEEK IN EACH MONTH OF 1924.

England and Wales. (Annual average : Males, 5,580 ; Females, 2,736 ; Total, 8,316.)

Week ended.	Males.	Females.	Total.	Week ended.	Males.	Females.	Total.
Jan. 12th ..	5,507	2,596	8,103	July 19th ..	5,664	2,768	8,432
Feb. 16th ..	5,522	2,670	8,192	Aug. 16th ..	5,677	2,774	8,451
March 15th ..	5,448	2,622	8,070	Sept. 13th ..	5,639	2,861	8,500
April 12th ..	5,537	2,655	8,192	Oct. 18th ..	5,559	2,851	8,410
May 17th ..	5,623	2,710	8,333	Nov. 15th ..	5,483	2,779	8,262
June 21st ..	5,666	2,776	8,442	Dec. 13th ..	5,634	2,769	8,403

Scotland. (Annual average : Males, 429 ; Females, 185 ; Total, 614.)

Jan. 12th ..	408	170	578	July 19th ..	435	179	614
Feb. 16th ..	409	171	580	Aug. 16th ..	440	195	635
March 15th ..	416	162	578	Sept. 13th ..	452	216	668
April 12th ..	420	172	592	Oct. 18th ..	447	202	649
May 17th ..	413	181	594	Nov. 15th ..	430	197	627
June 21st ..	434	177	611	Dec. 13th ..	442	204	646

Great Britain. (Annual average : Males, 6,009 ; Females, 2,921 ; Total, 8,930.)

Jan. 12th ..	5,915	2,766	8,681	July 19th ..	6,099	2,947	9,046
Feb. 16th ..	5,931	2,841	8,772	Aug. 16th ..	6,117	2,969	9,086
March 15th ..	5,864	2,784	8,648	Sept. 13th ..	6,091	3,077	9,168
April 12th ..	5,957	2,827	8,784	Oct. 18th ..	6,006	3,053	9,059
May 17th ..	6,036	2,891	8,927	Nov. 15th ..	5,913	2,976	8,889
June 21st ..	6,100	2,953	9,053	Dec. 13th ..	6,076	2,973	9,049

Northern Ireland. (Annual average : Males, 176 ; Females, 56 ; Total, 232.)

Jan. 12th ..	173	55	228	July 19th ..	181	56	237
Feb. 16th ..	173	54	227	Aug. 16th ..	180	58	238
March 15th ..	173	54	227	Sept. 13th ..	180	58	238
April 12th ..	173	54	227	Oct. 18th ..	179	57	236
May 17th ..	174	55	229	Nov. 15th ..	172	56	228
June 21st ..	180	56	236	Dec. 13th ..	172	56	228

IV.—Mechanical Power.

PARTICULARS OF PRIME MOVERS, ELECTRIC GENERATORS AND
ELECTRIC MOTORS.

(a) Ordinarily in use. (b) In reserve or idle.	England and Wales.	Scotland.	Great Britain.	Northern Ireland.
PRIME MOVERS :—				
	H.P.	H.P.	H.P.	H.P.
Reciprocating steam engines .. { (a)	9,694	1,072	10,766	753
.. { (b)	3,523	625	4,148	58
Steam turbines { (a)	2,680	50	2,730	—
.. { (b)	2,680	—	2,680	—
Gas engines { (a)	1,236	130	1,366	183
.. { (b)	176	—	176	—
Petrol and light oil engines .. { (a)	909	64	973	8
.. { (b)	194	5	199	—
Heavy oil engines { (a)	111	110	221	—
Water power { (a)	110	35	145	—
.. { (b)	—	—	—	—
TOTAL { (a)	14,740	1,461	16,201	944
.. { (b)	6,573	630	7,203	58
TOTAL OF PRIME MOVERS INSTALLED				
	21,313	2,091	23,404	1,002
ELECTRIC GENERATORS :—				
Driven by—	Kw.	Kw.	Kw.	Kw.
Reciprocating steam engines .. { (a)	3,456	490	3,946	45
.. { (b)	1,558	430	1,988	—
Steam turbines { (a)	2,000	—	2,000	—
.. { (b)	2,000	—	2,000	—
Gas engines { (a)	113	—	113	—
.. { (b)	65	—	65	—
Petrol and light oil engines .. { (a)	18	2	20	—
.. { (b)	5	—	5	—
Heavy oil engines { (a)	54	—	54	—
Water power { (a)	54	—	54	—
.. { (b)	20	—	20	—
TOTAL { (a)	5,646	492	6,138	45
.. { (b)	3,643	430	4,073	—
TOTAL OF ELECTRIC GENERATORS INSTALLED				
	9,289	922	10,211	45
ELECTRIC MOTORS :—				
Driven by—	H.P.	H.P.	H.P.	H.P.
Electricity generated in own { (a)	10,652	855	11,507	30
works { (b)	1,250	513	1,763	—
Purchased electricity { (a)	4,704*	236	4,940*	*
.. { (b)	423*	2	425*	*

* In order to avoid the disclosure of information relating to one firm, the particulars for Northern Ireland have been included with those for England and Wales and for Great Britain.