

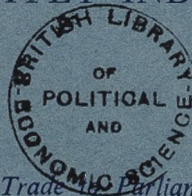
BOARD OF TRADE

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*The Report on the
Census of Production
for 1954*

Volume 12: Industry F

GAS SUPPLY INDUSTRY



*Presented by the Board of Trade to Parliament in pursuance of the
Statistics of Trade Act, 1947 (10 & 11 Geo. 6 Ch. 39, Sec. 7)*

LONDON: HER MAJESTY'S STATIONERY OFFICE

1957

PRICE 1s 9d NET

The Report on the Census of Production for 1954

VOLUME 12, INDUSTRY F

GAS SUPPLY INDUSTRY

THIS REPORT on the Gas Supply Industry relates to establishments producing and distributing gas. Establishments producing gas for use by works under the same control are excluded, being classified to the industries covering the major output of the parent works.

The Gas Supply Industry in Great Britain was brought under public ownership on May 1, 1949. In this report, the 1954 figures for larger undertakings cover all gas works, regardless of size, of the Area Gas Boards together with the larger non-nationalised undertakings in the United Kingdom.

Gross output in this industry is arrived at by aggregating the sales of gas, sales of coke and other by-products (adjusted for stocks), value of work charged for, rents of meters and appliances, the net receipts from the sale of appliances and the value of new constructional work carried out by employees of gas undertakings.

Figures for gas sold and gas purchased included in gross output and cost of materials used in 1951 and 1954 have been adjusted to exclude bulk inter-sales of gas, thus eliminating duplication. In 1951 figures for coke and coke breeze sold and purchased have also been adjusted to exclude sales between Area Gas Boards. For these reasons, particulars of gross output and cost of materials used in 1951 are not precisely comparable with those of other years.

Undertakings in this industry returned their materials and fuel purchased and used and not 'purchased' as in other industries with the exception of coke and other by-products which were recorded on the basis of purchases. The figures shown for stocks of coke and other by-products relate to goods purchased as well as those made by undertakings.

This industry corresponds to minimum list heading 210 in the Standard Industrial Classification. The figures in this report are based on returns made to the Ministry of Fuel and Power.

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IMPORTANT NOTES and definitions appear on the next page. In interpreting the data in the tables, it is essential to bear these in mind.

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The following notes describe terms in general use in the tables of the report. More detailed explanations of the terms used and a description of the scope and method of taking the census are given in the separate booklet entitled 'The Report on the Census of Production for 1954 - Introductory Notes' (price 1s. 6d. net).

Industrial Classification: Establishments are classified to industries according to the nature of their output and, as far as possible, in conformity with the Standard Industrial Classification. Certain products are identified as the principal products of individual industries, the principal products for a given industry being of a similar nature or commonly associated in production. The principle of classification normally followed is that an establishment is classified to an industry if its output of the principal products of that industry accounted for a greater proportion of the value of its output than did its output of the principal products of any other industry.

Specialist producers normally comprise those establishments 50 per cent. or more of whose total output by value is accounted for by the characteristic products of the specialist group.

Intermediate products: For some industries figures are given showing the total quantities made during the year of intermediate products, i.e., products which may be further processed in the establishments in which they are produced.

Larger establishments: The information given in the report relates mainly to 'larger establishments', i.e., establishments of firms employing on the average more than 10 persons. In most cases an establishment comprises the whole of the premises under the same ownership or management at a particular address (e.g., a mine or factory). Offices, warehouses, laboratories and other ancillary places of business situated apart from the producing works are not regarded as separate establishments and are included in the return for the works.

Small firms are those employing on the average 10 or fewer persons.

The estimates for the industry as a whole given in Table 1 are normally obtained by increasing the other items shown in the same proportion as total employment.

Gross output (production) is the total value of goods made and other work done during the year; it is obtained by adjusting the value of sales and work done during the year for changes in the value of stocks of products on hand for sale and work in progress.

Net output is the amount left after deducting from the value of gross output the aggregate of the cost of materials and fuel used, the amount paid for work given out, and, for 1951 and 1954, any transport payments made. This represents the value added to materials by the process of production, and constitutes the fund from which wages, salaries, rents, rates and taxes, advertising and other selling expenses and all other similar charges have to be met, as well as depreciation and profits.

Sales means sales during the year of goods made in the establishment covered by the return or made on commission for it, whether produced in the year or not. The value of sales is the net selling value, i.e., the amount charged to customers, whether on an ex-works or delivered basis, and net of any trade discounts, agents' commissions, allowances for returnable cases, purchase tax, etc. For goods charged on a delivered basis to customers overseas, firms were required to give the f.o.b. value.

Materials and fuel: The total cost of materials and fuel purchased includes all purchases during the year of materials for use in production, and of fuel (includ-

ing oil, gas and electricity) for all purposes: packing materials, including the full cost of returnable cases when first purchased; workshop and office materials; water charges; materials for repairs to buildings, plant and vehicles when carried out by firms' own work-people included in their returns; consumable tools; and parts for machinery purchased as replacements. Purchases of goods for merchanting are excluded. The cost of materials and fuel used, given in Table 2, is obtained by adjusting purchases for changes during the year in the value of stocks.

Stocks: Firms were required to give stocks of materials and fuel, products on hand for sale, and work in progress, at income tax values.

Customs and Excise Duty paid on materials purchased is normally included in the cost of materials. Finished goods are similarly valued as they were sold, duty-paid or duty-free. The net amount of any duty paid is deducted in arriving at net output.

Employment: Total employment includes working proprietors, administrative, technical and clerical employees, and operatives, but excludes outworkers, canteen employees and persons engaged in merchanting or any other activity not covered by a firm's return, who are shown separately as excluded employees. Employees are persons on the pay-roll (i.e., persons whose National Insurance cards were held by employers), whether employed full-time or part-time.

Working proprietors are proprietors of businesses other than limited companies, together with members of their families who worked in the business without receiving fixed wages or salaries. Any persons working less than half the normal hours are excluded. For Northern Ireland directors of limited companies (other than those paid by fee only) are also included.

Administrative, technical and clerical employees include directors, other than those paid by fee only (except in Northern Ireland); managers, superintendents and works foremen; research, experimental, development, technical and design employees (other than operatives); draughtsmen and tracers; travellers; and office (including works office) employees.

Operatives include all other classes of employees, i.e., broadly speaking, all manual workers.

Outworkers are persons employed by the firm who work on materials supplied by the firm in their own homes.

Wages and salaries include all overtime payments, bonuses and commissions without any deductions for income tax, insurances, contributory pensions etc. They exclude payments to working proprietors.

Capital expenditure includes expenditure on new building work, and on plant, machinery and vehicles, charged to capital account during the year, including any transport and installation costs involved. It includes expenditure in respect of establishments in Great Britain which had not begun production before the end of the year (which has not previously been included in the Census of Production reports for individual industries).

Symbols used:

.. for not available

- for nil or negligible (less than half the final digit shown).

Where figures are rounded, e.g., given to the nearest £ thousand, there may be apparent slight discrepancies between the sums of constituent items and the totals shown. In some cases, figures have been combined with others of a similar nature where publication of separate details might disclose information relating to an individual undertaking.

Industry summary

Estimates for the industry as a whole

TABLE 1

	United Kingdom			Scotland 1954	Wales 1954
	1948	1951	1954		
Gross output (production)	£ million 186	£ million 228	£ million 291	£ million 21	£ million 8
Net output	83	99	123	9	4
Total stocks of materials and fuel					
At beginning of year	21.3	28.3	44.5	2.8	0.9
Change during year	+ 3.7	+ 5.5	- 2.9	- 0.5	-
Capital expenditure less disposals (a)	25	40	53	4	1
Wages and salaries	46	58	70	5	2
Total employment	Thousands 135	Thousands 146	Thousands 145	Thousands 11	Thousands 5

(a) Capital expenditure on new building work and plant, machinery, vehicles and vessels less amounts received for plant, machinery, vehicles and vessels disposed of.

Summary of returns received

TABLE 2

	Unit	Great Britain 1948	United Kingdom	
			1951	1954(a)
UNDERTAKINGS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS				
Number of gas works	No.	705(b)	996	902
Gas sold	£'000	111,217	141,580	175,495
Coke by-products and electricity sold	"	47,148(b)	60,207	78,804(c)
Stocks of coke and by-products {at beginning of year	"	1,989	2,974	7,700(d)
{change during year	"	+ 1,570	+ 254	- 1,671(d)
Rents received (e)	"	7,875	8,541	8,065
Net receipts from sale of appliances (e)	"	3,197	6,486	10,661
Net value of work charged for (e)	"	6,636	7,197	8,266
Work of new construction carried out by employees of Gas Undertakings (f)	"	5,486	6,706	10,979
Gross output (production) (g)	"	181,557	228,474	290,599
Materials and fuel used other than coke or by-products (h)	"	99,212	129,648	164,928
Coke and by-products purchased	"	2,096	688	974
Less materials supplied to contractors for capital work	"	514	1,330	2,286
Cost of materials and fuel used	"	100,795	129,006	163,616
Payment for transport (i)	"	1,570	2,497	3,603
Net output	"	80,762	99,468	123,380
Stocks of materials and fuel {at beginning of year	"	18,807	25,310	36,058(d)
{change during year	"	+ 2,049	+ 5,266	- 1,230(d)
Average number of employees {operatives	No.	103,368	110,233	108,254
{others	"	28,452(j)	35,860	36,589
Total employment	"	131,821(k)	146,093	144,843
Net output per person employed	£	613	681	852
Wages and salaries {of operatives	£'000	33,658	41,456	50,167
{of others	"	11,634	16,655	20,207
Capital expenditure				
New building work	"	1,206	2,637	3,508
Plant and machinery {acquisitions (l)	"	15,502(m)	21,131	25,910
{disposals	"	245(m)	112	166
Meters {acquisitions	"	..	5,332(n)	5,025
{disposals	"	..	285(n)	218
Mains and services {acquisitions	"	6,119	9,278	17,266
{disposals	"	52	72	166
Appliances for hire {acquisitions	"	1,364	774	622
{disposals (o)	"	126	95	148

TABLE 2 (contd.)

	Unit	Great Britain 1948	United Kingdom	
			1951	1954(a)
Capital expenditure (contd.)				
Vehicles	{ acquisitions disposals	£'000 710 57	935 83	652 67
Vessels	{ acquisitions disposals	" - -	297 -	871 55
UNDERTAKINGS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS				
Number of gas works	No.	363(b)	(p)	..
Total employment, including working proprietors	"	1,987	(p)	..

- (a) The 1954 figures for larger undertakings cover all gas works regardless of size.
 (b) Number of returns.
 (c) Including inter-sales within the industry.
 (d) Great Britain only. No information about stocks was collected in Northern Ireland for 1954.
 (e) For details for 1951 and 1954 see Table 5 (A).
 (f) For details for 1951 and 1954 see Table 5 (B).
 (g) Gross output excludes for the years 1948 and 1951 and includes for the year 1954 payments for transport services outwards on goods sold.
 (h) Includes transport payments on materials and fuel purchased.
 (i) Payments to other firms and undertakings and Area Boards own separate transport organisations on goods sold.
 (j) Number in week ended September 25, 1948.
 (k) Including 1 working proprietor.
 (l) Including buildings (where they cannot be separately valued) and railway sidings owned by gas undertakings.
 (m) Including meters.
 (n) Great Britain only. Particulars for Northern Ireland are included with those for plant and machinery.
 (o) The figures for disposals represent the proceeds from sale of appliances formerly on hire that were sold without being renovated, plus the written down value of those sold after reconditioning.
 (p) No information about small undertakings was collected for 1951.

Analysis by size, 1954

Larger undertakings in the United Kingdom

TABLE 3

Size of gas works Number of operatives (a)	Gas works	Operatives employed (b)	Gas sent out	
			Mn. cu. ft.	Th. therms
	Number	Number		
1 - 10	401	1,780	11,041	50,412
11 - 24	174	2,772	20,013	91,154
25 - 49	115	4,020	36,251	169,237
50 - 99	89	5,241	66,102	310,763
100 - 199	65	10,152	104,621	495,924
200 - 299	24	5,909	67,484	319,866
300 - 399	11	3,808	48,281	222,718
400 - 499	11	4,874	50,521	244,611
500 - 749	8	4,805	56,307	268,115
750 - 999	2	1,779	14,844	77,241
1,500 - 3,999	2	5,237	44,981	231,603
Total	902	50,377	520,446	2,481,644

- (a) Excluding operatives employed outside gas works. The number of operatives employed in gas works in Northern Ireland has been estimated.
 (b) Week ended October 30, 1954.

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

Larger undertakings in the United Kingdom

No specialisation within this industry was distinguished.

Sales of the principal products of the industry, charges for work done and rents received

Larger undertakings in the United Kingdom

TABLE 5 (A)

	1951		1954			
	Quantity	Value	Quantity	Value		
Gas sold (a)	Th. therms	£'000	Th. therms	£'000		
	2,448,856	139,470	2,560,785	175,495		
	Mn. cu. ft.		518,495		Mn. cu. ft.	541,739
	7,229		2,110			
Coke	Th. tons		Th. tons			
	10,592	42,573(b)	11,108	55,591		
	Coke breeze	1,454	2,045(b)	1,624	3,143	
	Coal tar (crude) (c)(d)	1,367	6,257	1,446	8,411	
	Ammoniacal liquor (c)(e)	56	160	61	214	
	Sulphate of ammonia (c)(f)	80	1,171	85	1,347	
	Total coke and other by-products		52,206		68,706(g)	

Work done for which a direct charge was made

Fitting and repair of appliances	4,044	7,774
Repair and maintenance of public lamps	3,635	1,197
Other work charged to consumers		
Work of new construction done for other undertakings	37	-
Total work done for which a direct charge was made	7,716	8,971
Less amount paid to contractors for work charged to consumers	519	705
Net value of work charged for	7,197	8,266(h)
Rents received		
Prepayment supplement	6,557	4,197
Meter rents		
Hire of appliances (excluding hire purchase payments)	1,985	2,028
Total rents received	8,541	8,065

TABLE 5 (A) (contd.)

	1951	1954
	Value	Value
	£'000	£'000
Net receipts from sales of purchased and reconditioned appliances (i)	6,486	10,661
Total of sales of principal products, value of work charged for, rents received and net receipts from sales of appliances	216,023	271,193

(a) These figures do not include the sales of gas recorded by undertakings whose returns were made on schedules for other industries. The sales of gas at coke ovens were recorded as follows:

	Mn. cu. ft.	£'000
1951	135,631	8,556
1954	154,434	13,350

The sales of gas at blast furnaces were recorded as follows:

	Mn. cu. ft.	£'000
1951	..	5,377
1954	..	9,490

(b) Excluding inter-sales between Area Gas Boards.

(c) Undertakings were requested to return their figures in terms of the following equivalents:

Coal tar (crude), on the basis of 5 per cent. water content.

Ammoniacal liquor, in terms of .880 ammonia.

Sulphate of ammonia, in terms of 20.6 per cent. nitrogen.

(d) Excluding the sales of coal tar (crude) at coke ovens, which returned the following amounts:

	Th. tons	£'000
1951	775	3,800
1954	886	5,240

(e) Excluding the output of ammoniacal liquor at coke ovens which returned the following amounts:

	Th. tons	£'000
1951	{ 18	114
	{ ..	14
1954	{ 10	100
	{ ..	59

(f) For the total sales of sulphate of ammonia see the report on the Fertiliser, Disinfectant, Insecticide and Allied Industries (Volume 2, Industry C).

(g) Including inter-sales of all by-products.

(h) Excluding the value of work done by one Board on behalf of another. Details of these transactions are included in Table 5 (B).

(i) Derived as follows:

	1951	1954
	£'000	£'000
Receipts from sale of appliances (new and secondhand) (including purchase tax)	24,930	37,138
Less cost of appliances (purchased or made including purchase tax)	18,197	26,322
Less work given out	247	155
Net receipts from sale of appliances	6,486	10,661

Work of construction, repair and maintenance carried out by employees of Gas Undertakings

Larger undertakings in the United Kingdom

TABLE 5 (B)

	Value of work done (a)					
	1951			1954		
	New construction	Repair and maintenance	Total	New construction	Repair and maintenance	Total
	£'000	£'000	£'000	£'000	£'000	£'000
On depots, workshops, offices and other buildings	209	1,411	1,620	349	1,728	2,077
On plant and machinery	1,936	9,408	11,344	2,046	10,921	12,967
On gas mains and services	4,562	2,992	7,554	8,574	3,226	11,800
Work charged to other Boards	(b)	(b)	(b)	10	122	132
Total work carried out	6,706	13,811	20,518	10,979	15,997	26,976

(a) These values represent sums calculated to cover wages, salaries and the cost of materials used.

(b) For 1951 the amount of work charged to other Boards is included in Table 5 (A).

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

Larger undertakings in the United Kingdom

This table is not applicable to the industry. See Table 5 (A), footnote (a).

Sales in the industry of other than principal products: Larger undertakings in the United Kingdom
TABLE 7

	1954	
	Quantity	Value
	Th. tons	£'000
Oil gas tar (crude)	52	315
Spent oxide	269	907
Sulphuric acid (a)	27	214
Coal Tar products	Th. gal.	
Creosote oils (including anthracene oil)	14,943	746
	Th. tons	
Creosote/pitch mixtures (made for use as fuel)	121	837
Pitch	99	901
Naphthalene (crude) (a)	1	8
Naphthalene (whizzed)	3	54
Naphthalene (hot pressed)	2	53
Naphthalene (refined)	1	70
Tar bases	Th. gal.	
Pure pyridine	7	27
Other tar bases	30	31
	Th. tons	
Tar refined (b)	137	1,149
Tar acids	Th. gal.	
Crude tar acids	581	119
Cresylic acid (containing 40 per cent. or more of metacresol)	229	79
Cresylic acid, other refined	320	99
High boiling tar acids	55	10
	Th. tons	
Phenol crystals and liquified phenol	1	151
Phenol mixtures (c)	..	34
	Th. gal.	
Xylenols	72	22
Other tar acids	41	11
Benzole (crude) (d)	10,538	1,054
Benzole products		
Benzole refined (a)	13,277	1,926
Toluole (a)	1,748	360
Xylol (a)	452	99
Solvent naphtha (a)	244	40
Heavy naphtha (a)	1,742	198
Other by-products (e)	..	570
	Th. kWh.	
Electricity	4,149	14
Total		10,098

(a) Undertakings were requested to return their figures in terms of the following equivalents:

Sulphuric acid as 100 per cent. acid.

Anthracene in terms of 40 per cent. paste.

Naphthalene (crude) in terms of 66°C (melting point) salts.

Benzole (refined) in terms of motor benzole.

Toluole in terms of 90's toluole.

Xylol in terms of 3/5° xylol.

Solvent naphtha in terms of 90/160 grade.

Heavy naphtha in terms of 90/190 grade.

(b) Including mixtures containing not more than 10 per cent. of bitumen or other added materials.

(c) Containing not less than 80 per cent. of phenol.

(d) Including light oils distilling not less than 90 per cent. at 200°C.

(e) Details for Northern Ireland were not recorded separately; total figures are included under "other by-products".

GAS SUPPLY INDUSTRY

Total make of gas (a)

Larger undertakings in the United Kingdom

TABLE 8

		Returned in this industry	
		1951(b)	1954(c)
		Quantity	Quantity
Coal gas	Mn. cu. ft.	399,110	417,900
	Th. therms	1,969,647(d)	2,063,689
Oil gas	Mn. cu. ft.	465	811
	Th. therms	1,854(d)	3,521
Water gas	Mn. cu. ft.	84,106	92,213
	Th. therms	366,547(d)	401,754
Producer gas	Mn. cu. ft.	12,363	11,141
	Th. therms	24,552(d)	22,216
Other gases produced for distribution	Mn. cu. ft.	2,090	1,611
	Th. therms	7,350(d)	5,713
Total	Mn. cu. ft.	498,135	523,676
	Th. therms	2,369,950(d)	2,496,893

- (a) Gas made before benzole extraction, including gas used in the works in which it was made.
 (b) Great Britain only.
 (c) Gas made in Northern Ireland is included as coal gas and the quantity figures are calculated at the rate of 475 B.T.U.'s per cu. ft.
 (d) Based on the average calorific value.

Materials and fuel purchased and used, 1954

Larger undertakings in the United Kingdom

TABLE 9

	Quantity	Cost
	Th. tons	£'000
Materials		
Coke for all purposes (see below)		
Coke, coke breeze and other by-products	91(a)	387
Gas oil for gas making	526	7,332
Heavy oil for gas making	26	226
Gas purifying material	..	699
Other by-products	..	587
Iron castings	184	5,935
Wrought iron and steel tubes and fittings	..	2,150
Iron and steel in other forms, excluding replacement parts, finished parts and scrap	17	784
Refractory bricks and shapes	..	640
	Th. cu. ft.	
Timber, excluding plywood and veneers	198	147
All other purchased materials	..	17,964
Fuel and electricity		
Coal for all purposes	27,713	119,341
Liquid fuel (including creosote/pitch mixtures)		
For use in internal combustion engines	Th. gal.	
Motor spirit (petrol) for use in road vehicles and derv. fuel	6,508	1,202
	Th. tons	
Other	3	72

TABLE 9

GAS SUPPLY INDUSTRY

	Quantity	Cost
	Th. tons	£'000
Fuel and electricity (contd.)		
Liquid fuel (including creosote/pitch mixtures) (contd.)		
For burning in furnaces, boilers, kilns, etc.	14	165
	Th. therms	
Gas purchased from coke ovens and other sources	369,508	6,803
Electricity purchased (b)		
From Electricity Boards	268,746	1,436
From other sources	2,081	11
All other purchased fuel		21
Total cost		165,902(c)

- (a) The quantity figure shown relates to coke and coke breeze only.
 (b) The total quantity of electricity generated in 1954 was 108,381 Th.kWh.
 (c) Including cost of materials supplied to contractors for capital work.

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

TABLE 10

Larger undertakings in the United Kingdom

	1951	1954
	Number	Number
Average number of employees		
Operatives	110,233	108,254
Administrative, technical and clerical employees	35,860	36,589
Total	146,093	144,843
Wages and salaries paid to		
Operatives	£'000	£'000
Administrative, technical and clerical employees	41,456	50,167
	16,655	20,207
Total	58,111	70,374
Wages and salaries per head		
Operatives	£	£
Administrative, technical and clerical employees	376	463
	464	552
		£'000
Superannuation and other pension funds for employees and dependents (b)		
Employers' contributions	..	2,954
Employees covered	..	Number
		72,745
		£'000
Pension, etc. payments to former employees and dependents (b)	..	657

(a) The following persons, not included above, were also employed by larger undertakings in this industry in 1954:

Canteen workers 810
 Other workers 252

(b) The figures given relate to larger undertakings in Great Britain only.

Employment in a specified week (a): Larger undertakings in the United Kingdom

TABLE 11

	1951			1954		
	Males	Females	Total	Males	Females	Total
	Operatives	107,545	2,211	109,756	104,882	2,470
Administrative, technical and clerical employees	26,935	9,481	36,416	26,720	10,013	36,733
Total employees	134,480	11,692	146,172	131,602	12,483	144,085

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

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