

BOARD OF TRADE

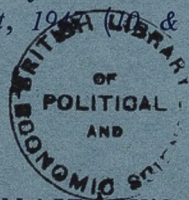
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*The Report on the
Census of Production
for 1954*

Volume 10: Industry H

CARDBOARD BOX, CARTON AND
FIBREBOARD PACKING CASE

*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 10, INDUSTRY H

CARDBOARD BOX, CARTON AND FIBREBOARD PACKING CASE

THIS REPORT on the Cardboard Box, Carton and Fibreboard Packing Case Industry relates to establishments engaged wholly or mainly in the manufacture of all types of rigid or folding cardboard boxes, canisters and other containers of board.

This industry corresponds to minimum list heading 182 in the Standard Industrial Classification.

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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 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		
Gross output (production)	£ million 44.9	£ million 98.9	£ million 94.6	£ million 7.05	£ million 1.71
Net output	21.3	38.7	38.9	2.84	0.65
Total stocks and work in progress					
At beginning of year	8.7	11.3	13.8	1.27	0.16
Change during year	+ 1.4	+ 13.8	+ 2.3	+ 0.08	+ 0.14
Capital expenditure less disposals (a)	2.0	3.2	3.7	0.28	(b)
Wages and salaries	10.5	16.1	19.9	1.40	0.29
Total employment (including working proprietors)	Thousands 41.5	Thousands 52.3	Thousands 53.4	Thousands 3.62	Thousands 0.91

(a) Capital expenditure on new building work, plant, machinery and vehicles (including (except in 1948) that incurred in Great Britain for establishments not yet in production), less amounts received for plant, machinery and vehicles disposed of.

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

Summary of returns received

TABLE 2

	Unit	Great Britain	United Kingdom	
		1948	1951	1954
FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS				
Number of establishments	No.	416	476	474
Total value of sales and work done	£'000	43,028	95,509	91,680
Products on hand for sale	at beginning of year change during year	1,857	2,821	3,359
and work in progress		+ 386	+ 1,696	+ 739
Gross output (production) (a)	"	42,930	97,206	92,419
Purchases of materials and fuel	"	23,026	69,087	53,641
Stocks of materials and fuel	at beginning of year change during year	6,458	8,293	10,125
Cost of materials and fuel used		+ 974	+ 11,913	+ 1,489
Payment for work done on materials given out	"	22,052	57,174	52,152
Payment for transport (b)	"	465	621	796
	"	483	1,422	1,486
Net output	"	20,413	37,989	37,985
Average number of employees	{ operatives others	No. 34,318	44,568	44,941
Total employment (d)		" 5,250(c)	6,763	7,166
Net output per person employed (d)	"	£ 39,665	51,445	52,206
	"	515	738	728
Wages and salaries	{ of operatives of others	£'000 7,441	11,602	14,676
		" 2,627	4,240	4,791
Capital expenditure				
New building work (e)	"	329	432	678
Plant and machinery	{ acquisitions (e) disposals	" 1,491	2,459	2,658
		" 96	112	195
Vehicles	{ acquisitions (e) disposals	" 181	426	358
		" 30	100	92
FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS				
Number of returns	No.	122	116(f)	102
Total employment, including working proprietors	"	873	785(f)	711

(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 in 1951.

CARDBOARD BOX, CARTON AND FIBREBOARD PACKING CASE

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	88	1,832	925	1,382	189	348	122	53	574
25 - 49	138	5,756	2,677	4,338	559	1,112	356	209	543
50 - 99	114	10,492	4,760	7,237	942	2,065	627	490	581
100 - 199	77	17,259	7,212	9,299	1,341	2,821	829	958	677
200 - 299	21	9,698	4,223	4,388	723	1,375	509	305	826
300 - 399	14	11,930	4,715	4,102	812	1,586	532	369	960
400 - 499	6	9,206	3,190	2,180	409	927	292	171	1,232
500 - 749	8	9,888	3,430	4,453	634	1,525	435	404	674
750 - 999	4	7,270	2,923	2,664	567	1,096	358	345	905
1,000 and over	4	9,088	3,929	4,898	990	1,822	731	389	667
Total	474	92,419	37,985	44,941	7,166	14,676	4,791	3,693	728

(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.

Analysis according to specialisation within the industry, 1954

Larger establishments in the United Kingdom

TABLE 4

	Unit	Specialist producers of			Remainder of the industry	Total
		Rigid boxes	Cartons	Fibreboard packing cases		
Number of establishments	No.	307	85	39	43	474
Total value of sales and work done	£'000	19,254	33,743	29,525	9,158	91,680
Sales of characteristic products	"	16,675	27,852	27,502		
Products on hand for sale	{ at beginning of year	469	2,093	448	347	3,359
and work in progress	{ change during year	+ 78	+ 489	+ 81	+ 91	+ 739
Gross output (production)	"	19,332	34,232	29,607	9,248	92,419
Purchases of materials and fuel	"	9,339	19,726	19,404	5,173	53,641
Stocks of materials and fuel	{ at beginning of year	2,275	3,990	2,921	938	10,125
	{ change during year	+ 343	+ 479	+ 504	+ 163	+ 1,489
Cost of materials and fuel used	"	8,996	19,247	18,899	5,009	52,152
Payment for work done on materials given out	"	454	852	679	297	796
Payment for transport	"					1,486
Net output	"	9,882	14,132	10,028	3,942	37,985
Average number of employees	{ operatives	No. 17,077	15,812	6,832	5,220	44,941
	{ others	" 2,214	2,839	1,279	834	7,166
Total employment (a)	"	19,376	18,655	8,115	6,060	52,206
Net output per person employed (a)	£	510	758	1,236	651	728
Wages and salaries	{ of operatives	£'000 4,365	5,833	2,783	1,696	14,676
	{ of others	" 1,401	1,996	876	517	4,791
Capital expenditure						
New building work (b)	"	175	170	281	52	678
Plant and machinery	{ acquisitions (b)	" 508	1,237	529	384	2,658
	{ disposals	" 67	88	11	29	195
Vehicles	{ acquisitions (b)	" 153	113	69	23	358
	{ disposals	" 47	28	11	6	92

(a) Excluding outworkers and including working proprietors.

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

CARDBOARD BOX, CARTON AND FIBREBOARD PACKING CASE

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

TABLE 5

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
Boxes and cartons of paper and cardboard (a)	Th.cwt.	£'000	Th.cwt.	£'000	Number
Rigid boxes (including rigid boxes delivered in the flat, and round boxes)	2,480	19,580	2,382	16,291	430
	..	2,861	..	6,261	
Cartons	4,116	33,936 (b)	3,923	26,542	238
	6,693	
Unclassified	136	1,220	131	1,078	49
	..	333	..	543	
Fibreboard packing cases (a)					
Solid	3,774	11,539 (b)	4,444	11,971	47
Corrugated (including sleeves, fittings, etc.)	4,306	24,041	5,773	24,557	72
Unclassified	26	151	45	218	5
Composite containers (board and tin, etc.)	522	3,102	315	2,135	42
	..	785	..	1,715	
Covers and other components for composite containers, sold separately (c)	1	53	..	110	10
	..	65	
Work done for the trade or on commission (d)		446		118	34
Total		98,112		98,231	..
Sales in other industries (see Table 6)		12,099		13,947	..
Principal products of this industry sold by establishments in the industry		86,013		84,283	437

(a) In addition to the sales shown, the following quantities are recorded as having been made for their own use by firms making returns as under:-

	Th.cwt.			
	By firms making returns in the			
	Cocoa, Chocolate and Sugar Confectionery Industry		Tobacco Industry	
	1951	1954	1951	1954
Boxes and cartons of paper and cardboard (including outers)	229	350	23.6	86.1
Fibreboard packing cases	-	

(b) Corrected figure.

(c) So far as recorded separately.

(d) Amount charged.

CARDBOARD BOX, CARTON AND FIBREBOARD PACKING CASE
Sales of principal products of the industry by establishments
classified to other industries
Larger establishments in the United Kingdom

TABLE 6

	1954			Principal industries in which produced (a)
	Quantity	Value	Entries	
	Th.cwt.	£'000	Number	
Boxes and cartons of paper and cardboard				
Rigid boxes (including rigid boxes delivered in the flat and round boxes)	117	689	77	10K, 10F, 11F, 10I
	..	713		
Cartons	322	1,187	55	10K, 8H, 10F, 10E
	..	1,311		
Unclassified	131	1,078	46	10I, 8I, 9M, 6J
	..	414		
Fibreboard packing cases and composite containers (board and tin, etc.)	3,119	8,388	24	10E, 10F, 10I, 5E
	..	59		
Covers and other components for composite containers	..	110	10	5E
Total	..	13,947	..	

(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
TABLE 7

	1954	
	Quantity	Value
	Th.cwt.	£'000
Paper and board		
Coated, laminated and reinforced (e.g. cloth lined) board	56	133
	..	42
Other paper and board	117	659
	..	69
Paper bags	39	358
Labels, tags, plain or printed	..	983
Purchased paper, creped, corrugated, crinkled, etc.	92	311
	..	47
Jam pot covers, bottle caps, discs, etc. of paper, cardboard, or transparent cellulose wrappings	..	37
Purchased wrapping paper, cut and packed	19	192
Manufactured stationery of paper	8	73
	..	297
Toys of paper and cardboard	..	90
Other manufactures of paper or cardboard, not elsewhere specified	..	984
Printing, Bookbinding, Stereotyping, Engraving and Kindred Industries		
Books and other published matter(a)	..	125
Tickets, showcards and posters, mounted or not	..	461
Cases, crates and boxes of wood	Th.cu.ft. of timber used	
	78	67
	..	31
Waste paper and board	Th.cwt.	
	2,047	731
Work done classified to the Printing, Bookbinding, Stereotyping, Engraving and Kindred Industries (b)		1,140
Other goods and other work done	..	570
Total		7,397

(a) Net selling value or amount charged for printing work done.
(b) Amount charged.

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.cwt.	£'000
Materials		
Board		
Uncoated board		
Strawboard and chipboard	6,933.1	13,822
Other uncoated board	3,648.2	11,448
Coated board	1,255.7	5,028
Paper		
Uncoated paper		
Strawpaper	1,890.4	3,915
Other uncoated paper	2,368.5	8,214
Coated paper	111.1	973
	..	188
Fancy paper	22.4	261
	..	160
Glue and other adhesives	1,006.0	1,045
Tinned plates or sheets	134.7	362
	..	67
Printing ink	27.6	972
	..	168
Wax (a)	23.9	154
	..	68
Timber (excluding timber used for packing)	Th.cu.ft.	
	180.5	113
	..	236
Packing materials	..	523
Replacement parts for machinery, plant and vehicles and consumable tools bought as replacements	..	967
All other purchased materials	..	3,778
Fuel and electricity	Th.tons.	
Coal	56.7	249
Coke	6.7	38
Liquid fuels (including creosote/pitch mixtures)		
For use in internal combustion engines	Th.gal.	
Motor spirit (petrol) for use in road vehicles and derv. fuel	1,295.3	259
Other	94.6	6
For burning in furnaces, boilers, kilns, etc.	3,047.5	129
Gas purchased from Gas Boards and other sources	Th.therms	
	1,558.3	93
Electricity purchased	Th.kWh.	
From Electricity Boards	46,220.0	285
	..	35
From other sources, including other departments of the same firms	3,275.0	20
All other purchased fuel		64
Total cost		53,641

(a) So far as recorded separately.

CARDBOARD BOX, CARTON AND FIBREBOARD PACKING CASE

Average number of employees and wages, salaries
and superannuation payments

Larger establishments in the United Kingdom (a)

TABLE 10

	1951		1954	
	Number		Number	
Average number of employees				
Operatives	44,568		44,941	
Administrative, technical and clerical employees	6,763		7,166	
Total	51,331		52,107	
Wages and salaries paid to	£'000		£'000	
Operatives	11,602		14,676	
Administrative, technical and clerical employees	4,240		4,791	
Total	15,842		19,467	
Wages and salaries per head	£		£	
Operatives	260		327	
Administrative, technical and clerical employees	627		669	
Superannuation and other pension funds for employees and dependents (b)			£'000	
Employers' contributions	..		477	
Employees covered	..		Number 16,097	
Pension, etc. payments to former employees and dependents (b)	..		£'000 88	

(a) The following persons, not included above, were also employed by larger establishments in this industry ("other workers" includes, for example, employees engaged in merchandising). Payments to outworkers are also shown.

	United Kingdom	
	1951	1954
	Number	Number
Canteen workers		
Males	21	24
Females	492	504
Total	513	528
Other workers		
Males	53	77
Females	30	47
Total	83	124
Total excluded employees	596	652
Payments to outworkers	£'000 149	£'000 176
Outworkers	No.	No.
Males	5	104
Females	1,628	1,550
Total	1,633	1,654

(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	105	9	114	90	9	99
Operatives	16,026	29,011	45,037	16,879	29,424	46,303
Administrative, technical and clerical employees	4,053	2,804	6,857	4,264	2,976	7,240
Total employees	20,079	31,815	51,894	21,143	32,400	53,543

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

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