

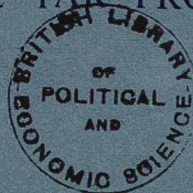
BOARD OF TRADE

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*The Report on the
Census of Production
for 1954*

Volume 2: Industry D

COAL TAR PRODUCTS



*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

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PRICE 1s 9d NET

The Report on the Census of Production for 1954

VOLUME 2 INDUSTRY D

COAL TAR PRODUCTS

THIS REPORT on the Coal Tar Products Industry relates to establishments engaged wholly or mainly in the manufacture by tar distillation of coal tar products other than dyes and dyestuffs.

This industry is included among the miscellaneous chemical industries in minimum list heading 31(4) 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 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 19.4	£ million 23.7	£ million 30.2	£ million 1.96	£ million 0.81
Net output	4.9	5.9	6.0	(a)	(a)
Total stocks and work in progress					
At beginning of year	2.3	2.7	4.1		
Change during year	+ 0.3	+ 0.7	+ 0.2		
Capital expenditure less disposals (b)	0.7	1.2	1.5		
Wages and salaries	2.2	2.5	3.2	0.19	0.10
Total employment (including working proprietors)	Thousands 6.3	Thousands 6.2	Thousands 6.0	Thousands 0.37	Thousands 0.17

(a) Owing to the risk of disclosure of information relating to individual firms, separate particulars for Scotland and Wales cannot be given.

(b) 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.

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.	78	73	66
Total value of sales and work done	£'000	19,209	23,074	29,349
Products on hand for sale	{ at beginning of year change during year	1,215	1,545	2,400
and work in progress		+ 258	+ 304	+ 270
Gross output (production) (a)	"	18,993	23,378	29,619
Purchases of materials and fuel	"	14,231	16,792	20,962
Stocks of materials and fuel	{ at beginning of year change during year	992	1,093	1,586
Customs and Excise Duty (net)		+ 81	+ 385	- 37
Cost of materials and fuel used	"	(b) 14,150	(b) 16,407	(b) 21,438
Payment for work done on materials given out	"	21	55	1,302
Payment for transport (c)	"	475	1,117	
Net output	"	4,821	5,799	5,879
Average number of employees	{ operatives others	No. 4,579	4,584	4,390
Total employment (e)		"	1,540 (d)	1,571
Net output per person employed (e)	"	£ 6,122	6,157	5,881
Wages and salaries	{ of operatives of others	£'000 1,464	1,746	2,164
Capital expenditure		"	651	745
New building work (f)	"	155	151	186
Plant and machinery	{ acquisitions (f) disposals	"	535	932
Vehicles		"	27	17
	{ acquisitions (f) disposals	"	56	83
		"	4	5
FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS				
Number of returns	No.	16	13 (g)	15
Total employment, including working proprietors	"	86	72 (g)	101

(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) For the year 1948 no information was collected about Customs and Excise Duty. For 1951, owing to the risk of disclosure of information relating to individual firms the net amount of the Duty was included in 'Purchases of materials and fuel'.

(c) Payments to other firms and undertakings and to firms' own separate transport organisations. For the year 1948 payments cover only transport outwards of finished goods sold. For subsequent years they cover payments for transport of both finished goods sold and materials and fuel purchased.

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

(e) Excluding outworkers and including working proprietors.

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

(g) Excluding Northern Ireland. No information about small firms was collected in Northern Ireland for 1951.

COAL TAR PRODUCTS

Analysis by size, 1954

Larger establishments in the United Kingdom

TABLE 3

Average number employed (a)	Establishments	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	17	2,027	338	218	102	108	64	27	1,056
25 - 49	19	4,361	725	511	176	251	112	63	1,053
50 - 99	10	4,457	773	614	185	307	115	36	968
100 - 199	12	8,807	1,842	1,289	412	621	260	486	1,083
200 - 499	8	9,966	2,201	1,758	615	877	376	834	928
Total	66	29,619	5,879	4,390	1,490	2,164	925	1,445	1,000

(a) Including working proprietors.

(b) Capital expenditure on new building work and on acquisition of plant, machinery and vehicles, excluding expenditure for establishments not yet in production.

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

Larger establishments in the United Kingdom

No specialisation within this industry was distinguished.

Sales of the principal products of the industry, including sales of these products by establishments classified to other industries

Larger establishments in the United Kingdom(a)

TABLE 5

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
	Th.gal.	£'000	Th.gal.	£'000	Number
Benzole, crude (including light oils distilling not less than 90 per cent at 200°C)	35,721	2,979	40,523	4,054	69
Benzole products (including products from benzole derived from gas)					
Benzole, refined (in terms of motor benzole)	67,072	8,059	76,834	12,263	67
Toluoles, refined (in terms of 90's toluole)	8,172	1,301	12,364	2,765	53
	..	200			
Xyloles, refined (in terms of 3/5° xylol)	3,553	677	4,363	1,144	43
	..	121			
Solvent naphtha (in terms of 90/160 grade)	3,783	592	5,981	1,160	38
Heavy naphtha (in terms of 90/190 grade)	4,376	548	5,981	908	48
Creosote oils (including anthracene oil)	107,796	4,814	102,741	5,280	59
	Th.tons		Th.tons		
Creosote/pitch mixtures (made for use as fuel)	578.2	3,714	691.3	5,157	40
Naphthalene (all grades, in terms of 66°C salts)	50.0	1,287	51.3	1,221	82
Pitch	548.7	3,422	482.5	4,439	50
	Th.gal.		Th.gal.		
Tar bases	333	484	290	392	18
	Th.tons		Th.tons		
Tar, refined (including mixtures containing not more than 10 per cent of bitumen or other added material)	618.5	4,339	677.1	5,792	50

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COAL TAR PRODUCTS

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 (contd.)

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
	Th.gal.	£'000	Th.gal.	£'000	Number
Tar acids					
Crude tar acids	6,228	1,288	7,507	1,586	20
Cresylic acid (refined, all grades) (b)	5,537	1,823	5,706	1,902	16
	Th.tons		Th.tons		
Phenol crystals and liquefied phenol (equivalent crystal phenol content) and synthetic phenol (b)	6.6	929 (c)	15.3	2,380	15
Phenol mixtures containing not less than 80 per cent of phenol (equivalent crystal phenol content) (b)	2.6	329	2.7	388	10
	Th.gal.		Th.gal.		
Other tar acids	1,259	369	1,379	576	15
	..	113			
Other coal tar products (except dyes and dyestuffs)	..	1,643	..	1,310	62
Unclassified coal tar products	..	1,486	..	1,932	9
Waste products	..	17	..	22	..
Work done for the trade or on commission (d)	..	75	..	69	6
Total		40,612		54,740	..
Sales in other industries (see Table 6)		18,883		26,923	..
Principal products of this industry sold by establishments in the industry		21,729		27,817	35

(a) Sales of products derived from petroleum that are identical with those derived from coal tar, e.g., benzole, toluoles, xyloles, solvent naphtha and phenol, are included in this table.

(b) Sales by the Coke Oven industry are included with 'Other tar acids'.

(c) Excluding some synthetic phenol which, in 1951, was classified as a principal product of the Chemicals (General) Industry (Volume 2, Industry E).

(d) Amount charged.

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COAL TAR PRODUCTS

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.gal.	£'000	Number	
Benzole, crude (including light oils distilling not less than 90 per cent at 200°C)	39,667	3,969	58	2A, 12F
Benzole products (including products from benzole derived from gas)				
Benzole refined (in terms of motor benzole)	58,122	9,084	50	
Toluoles, refined (in terms of 90's toluole)	7,644	1,689	38	
Xyloles, refined (in terms of 3/5° xylol)	2,468	618	30	
Solvent naphtha (in terms of 90/160 grade)	2,316	374	23	
Heavy naphtha (in terms of 90/190 grade)	2,623	350	32	
Creosote oils (including anthracene oil)	20,625	1,072	28	
	Th.tons			
Creosote/pitch mixtures (made for use as fuel)	218.1	1,581	17	
Naphthalene (all grades, in terms of 66°C salts)	19.8	443	62	
Pitch	142.3	1,274	21	
	Th.gal.			
Tar bases	44	64	5	
	Th.tons			
Tar refined (including mixtures containing not more than 10 per cent of bitumen or other added material)	177.1	1,491	21	
Tar acids				
	Th.gal.			
Crude tar acids	791	174	8	
Crésylic acid (refined, all grades), phenol crystals and liquefied phenol (equivalent crystal phenol content), synthetic phenol and phenol mixtures containing not less than 80 per cent of phenol (equivalent crystal phenol content)	..	1,977	8	
Other tar acids	678	268	7	
Other coal tar products (except dyes and dyestuffs)	..	562	41	
Unclassified coal tar products	..	1,932	9	
Total		26,923	..	

(a) The volume number and industry references given are to the industries shown in the list at the back of this report.

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COAL TAR PRODUCTS

Sales in the industry of other than principal products

Larger establishments in the United Kingdom

TABLE 7

	1954	
	Quantity	Value
	Th.cwt.	£'000
Disinfectants, antiseptics, insecticides, weedkillers, sheep and cattle dips and dressings		
Coal tar disinfectants, antiseptics and sheep and cattle dips and dressings	..	199
Other	..	248
Ammonia liquor and other chemical products	..	444
Manufactured bituminous products		
Bituminous emulsions (except emulsions for use as paint)	271.2	22
Other	..	35
Other goods	..	84
Total		1,532

Total make of intermediate products
Larger establishments in the United Kingdom

TABLE 8

	Returned in this industry			Returned in all industries		
	1951	1954		1951	1954	
	Quantity	Quantity	Entries	Quantity	Quantity	Entries
	Th.gal.	Th.gal.	Number	Th.gal.	Th.gal.	Number
Benzole, crude (including light oils distilling not less than 90 per cent at 200°C)	6,548	10,529	17	95,465	106,482	104

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

TABLE 9

	Quantity	Cost
	Th.gal.	£'000
Materials		
Benzole, crude (including light oils distilling not less than 90 per cent at 200°C)	30,572	2,913
Bitumen	5.9	69
Coal tar, crude (on the basis of 5 per cent water content)	1,972.8	11,690
Crude tar oils	77.4	374
Creosote oils (including anthracene oil)	7,970	356
Limestone and lime	37.3	111
Heavy naphtha (in terms of 90/190 grade)	3,015	341
Naphthalene, all grades (in terms of 66°C salts)	4.8	79
Sodium compounds		
Carbonate, including soda crystals and soda ash (on the basis of 58°)	7.9	87
Caustic (on the basis of 76°E)	6.7	102
Sulphuric acid (on the basis of 100 per cent acid)	11.9	124

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Purchases of materials and fuel, 1954

Larger establishments in the United Kingdom

TABLE 9 (contd.)

	Quantity	Cost
	Th. tons	£'000
Materials (contd.)		
Tar acids	19.4	903
Packing materials		
Of timber and containers made of timber	..	4
Of paper and board and containers made of paper and board	..	18
Other	..	315
Replacement parts for firm's own machinery, plant and vehicles	..	646
Consumable tools bought as replacements	..	35
All other purchased materials	..	1,467
	Th. tons	
Fuel and electricity		
Coal	206.6	743
Coke	14.0	61
Liquid fuels (including creosote/pitch mixtures)		
For use in internal combustion engines	Th. gal.	
Motor spirit (petrol) and other liquid fuels for use in road vehicles and derv. fuel	565	102
For burning in furnaces, boilers, kilns, etc.	3,097	91
	Th. therms	
Gas purchased		
From Gas Boards	2,950	39
From other sources, including other departments of the same firms		
Electricity purchased	Th. kWh.	
From Electricity Boards	35,272	160
From other sources, including other departments of the same firms	2,002	13
All other purchased fuel		119
Total Cost		20,962

(57913)

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	4,584	4,390
Administrative, technical and clerical employees	1,571	1,490
Total	6,155	5,880
	£'000	£'000
Wages and salaries paid to		
Operatives	1,746	2,164
Administrative, technical and clerical employees	745	925
Total	2,491	3,089
	£	£
Wages and salaries per head		
Operatives	381	493
Administrative, technical and clerical employees	474	621
		£'000
Superannuation and other pension funds for employees and dependents (b)		
Employers' contributions	..	78
		Number
Employees covered	..	1,961
		£'000
Pension, etc. payments to former employees and dependents (b)	..	16

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

	United Kingdom	
	1951	1954
	Number	Number
Canteen workers		
Males	4	2
Females	58	60
Total	62	62
Other workers		
Males	(c)	111
Females	(c)	10
Total	91	121
Total excluded employees	153	183

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

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

Employment in a specified week (a)

Larger establishments in the United Kingdom

TABLE 11

	1951			1954		
	Males	Females	Total	Males	Females	Total
Working proprietors	2	-	2	1	-	1
Operatives	4,556	140	4,696	4,271	115	4,386
Administrative, technical and clerical employees	1,198	395	1,593	1,104	406	1,510
Total employees	5,754	535	6,289	5,375	521	5,896

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

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