

INDUSTRY

A special case, as much social as economic, has already been made for presenting a separate section on agriculture. No other individual industries are now sufficiently dominant, either economically or socially, to justify a section devoted to them. A few industries - like the utilities of electricity, gas and water in the section on energy - have a specific table. But in general there are not many industries in Wales which by their relative size or significance now demand such special treatment. In this negative sense the present section on Industry registers the substantial shift that has taken place in the structure of Welsh industry. The diminishing dominance of a few primary producing industries (coal, agriculture, slate lead etc.) and basic metal making like iron and steel is a trend that has been in evidence since at least the 1920s: but it has only been in the final quarter of the century that the permanent structural change can be seen to have been effected. In a more positive sense the shifts are registered in what many would see as a healthier, more balanced and diversified industrial structure.

Despite what is said above, tables 4.3 and 4.4 relate to specific industries; coal and iron and steel. The series on coal (Table 4.3) is not, however, simply an exercise in nostalgia: in 1970 there were still 40,000 miners in Wales and over 50 pits operated by British Coal (as well as a larger number of smaller, privately-operated mines). It seemed reasonable to record the (almost) final stage in the decline of the industry which took place during these years (it is supplemented by information on coal consumption in Table 6.1 of the section on Energy and Utilities). The series on iron and steel (Table 4.4) is justified in different terms: although the industry had never exercised a dominance comparable to coal, it was always important and - because of the very large size of the individual plants - loomed large in the very small number of places in which it had come to be located by

the early 1970s. These aspects have largely continued as indicated by the (more or less) stabilisation of the main output indicators: the series also illustrates the importance of the industry as a source of demand for other sectors.

As it is often the case a by-product of tax requirements is to provide information, frequently of a high quality, on other aspects. Thus, once they become available for Wales, the figures on the number of businesses registered for Value Added Tax (since they encompass all but the very smallest enterprises) provide a good indicator of one major feature of business activity in Wales and its distribution between the counties (Table 4.1). The material also has the advantage of being comprehensive in the sense of covering all businesses whatever the particular nature of their activity. It thus enables (Table 4.2) analysis of the number of businesses in broad economic sectors of which nine are shown here covering a range of manufacturing, service, distribution and other activities. It would, of course, be misleading to draw any conclusions about relative significance - whether over time, space or different sectors - simply from information on the number of businesses. Much of this is better done through some of the tables included in the next broad sector on Labour, but the complications can be partly indicated by Tables 4.5 and 4.6. The first of these indicates the range of plant size in one economic sector (manufacturing) in terms of the number employed and over time; the second gives the range of geographical distribution. In both cases any specific figures should be regarded with some caution.

The remainder of the tables in this section deal with a topic, government assistance to industry, not covered in the earlier historical volumes. It is not contended that such official grants etc. were new, that they sprang so-to-speak ready-wrapped from the

government super-market in the 1970s: the notion of development areas, for example, went back at least to the 1930s. But by the last quarter of the twentieth century they demanded specific attention because: they had become much more general; the sources of finance from the UK government were now supplemented by money from the European Regional and social funds; and the institutions for their administration had also multiplied, notably for Wales with the

appearance of the Welsh Development Agency (WDA) and the Development Board for Rural Wales (DBRW). Tables 4.7 - 4.13 attempt to indicate the scale of this assistance: the material is generally reliable although it needs to be borne in mind that, although some of the figures are in absolute terms impressive, they are mostly relatively small in the overall context of economic activity in Wales.

4.1 Total number of businesses registered for VAT (a)

	Clwyd	Dyfed	Gwent	Gwynedd	Mid Glamorgan	Powys	South Glamorgan	West Glamorgan	Wales
1979	9,862	15,202	7,695	8,475	7,848	6,974	7,963	6,399	70,418
1980	9,950	15,340	7,924	8,539	7,787	7,074	7,954	6,315	70,883
1981	10,196	15,733	8,297	8,736	8,036	7,258	8,269	6,461	72,987
1982	10,471	15,965	8,543	8,817	8,285	7,411	8,394	6,591	74,478
1983	10,707	16,290	8,840	8,899	8,577	7,516	8,641	6,784	76,255
1984	10,773	16,499	9,045	8,912	8,717	7,554	8,662	6,858	77,020
1985	10,738	16,453	9,058	8,862	8,708	7,562	8,542	6,837	76,761
1986	10,869	16,420	9,238	8,858	8,889	7,607	8,505	6,840	77,226
1987	11,181	16,577	9,599	8,968	9,162	7,705	8,656	6,879	78,726
1988	11,682	17,022	10,032	9,232	9,784	7,905	8,935	7,208	81,800
1989	12,175	17,487	10,614	9,454	10,338	8,079	9,348	7,504	84,999
1990	12,610	17,753	10,940	9,597	10,554	8,246	9,721	7,716	87,136
1991 (b)	12,294	16,881	10,133	9,211	9,544	8,204	9,230	7,277	82,775
1992 (b)	11,996	16,582	9,872	8,939	9,312	8,142	9,033	6,916	80,791
1993 (b)	11,611	16,292	9,632	8,766	9,211	8,008	8,815	6,763	79,097
1994 (b)	11,530	16,089	9,256	8,640	9,050	7,944	8,771	6,652	78,202
1995 (b)	11,398	15,294	9,357	8,313	8,736	7,694	8,835	6,476	76,102

Source: Department of Trade and Industry

- (a) At end of year.
 (b) The March 1991 Budget increased the VAT threshold from £25,000 to £35,000. This reduced the number of registrations and increased the number of deregistrations in 1991. It also resulted in the data for 1992 being incompatible with those for earlier years. Threshold raised to £45,000 in 1993.

4.2 VAT registered businesses by industry (a)

(b)	Agriculture	Production	Construction	Transport	Wholesale	Retail	Financial	Catering	Motor	Other	Total
1979	19,545	3,614	8,227	2,817	3,620	15,235	2,124	7,851	3,624	3,761	70,418
1980	19,734	3,732	8,487	2,789	3,688	14,890	2,182	7,847	3,656	3,879	70,883
1981	20,176	3,986	8,870	2,856	3,901	15,092	2,287	7,907	3,787	4,126	72,987
1982	20,374	4,190	9,304	2,925	4,006	15,095	2,368	7,962	3,854	4,400	74,478
1983	20,456	4,440	10,067	3,024	4,197	14,920	2,479	8,048	3,925	4,697	76,255
1984	20,501	4,581	10,205	3,009	4,240	14,886	2,618	8,182	3,911	4,887	77,020
1985	20,294	4,766	9,885	3,036	4,265	14,590	2,768	8,124	3,934	5,098	76,761
1986	20,111	4,968	9,893	3,124	4,263	14,436	2,973	8,133	3,960	5,365	77,226
1987	19,990	5,264	10,362	3,255	4,348	14,351	3,171	8,322	3,989	5,766	78,726
1988	19,882	5,676	11,250	3,468	4,412	14,543	3,508	8,515	4,136	6,411	81,800
1989	19,887	5,942	12,198	3,671	4,524	14,623	3,963	8,685	4,269	7,236	84,999
1990	19,951	6,049	12,725	3,725	4,729	14,467	4,437	8,792	4,341	7,920	87,136
1991 (c)	19,443	5,793	11,940	3,613	4,768	13,596	4,503	8,228	4,144	7,794	83,816
1992 (c)	19,278	5,507	11,274	3,487	4,700	12,989	4,586	7,984	4,015	7,737	81,522
1993 (c)	19,171	5,290	10,669	3,322	4,486	12,363	4,718	7,778	3,827	8,054	79,680
1994 (c)	19,053	5,051	10,633	3,279	4,120	11,591	4,930	7,515	3,776	8,264	78,202
1995 (c)	..	..	..	..	..	..	..	..	..	..	76,102

Source: Department of Trade and Industry

- (a) At end of year.
 (b) Industry (SIC68 based).
 (c) The March 1991 Budget increased the VAT threshold from £25,000 to £35,000. This reduced the number of registrations and increased the number of deregistrations in 1991. It also resulted in the data for 1992 being incompatible with those for earlier years. Threshold raised to £45,000 in 1993.

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4.3 Summary of deep coal mine operations (a)

	Number of mines (b)		Production (c)				Man shifts worked (d)	
	Operated		Area		Type		(thousands)	
	by British Coal	Other	North Wales	South Wales	Anthracite	Bituminous	North Wales	South Wales
1973-74	50	109	0.46	7.16	1.17	6.45	388	5,610
1974-75	50	84	0.51	8.52	1.37	7.66	282	6,345
1975-76	44	79	0.46	8.32	1.26	7.52	278	6,092
1976-77	43	81	0.50	7.66	1.09	7.07	265	5,821
1977-78	37	84	0.53	7.31	1.12	6.72	262	5,664
1978-79	37	81	0.66	7.80	1.49	6.97	257	5,525
1979-80	38	81	0.68	7.50	1.54	6.64	269	5,368
1980-81	36	86	0.68	7.60	1.44	6.84	262	5,210
1981-82	35	89	0.68	7.47	1.45	6.69	262	5,081
1982-83	35	84	0.75	6.84	1.15	6.43	261	4,648
1983-84	30	85	0.66	6.56	1.04	6.18	238	4,181
1984-85 (g)	..	..	..	..	..	..	..	..
1985-86	19	109	0.68	6.54	1.06	6.15	257	3,497
1986-87	15	105	0.59	6.39	0.79	6.19	219	2,620
1987-88	12	95	0.47	4.99	0.84	4.62	150	2,183
1988-89	10	87	0.51	5.02	0.74	4.79	145	1,752
1989-90	6	99	0.59	3.45	0.53	3.51	137	1,136
1990-91	5	89	0.57	3.17	0.52	3.22	129	630
1991-92	4	69	0.56	1.74	0.14	2.16	123	303
1992-93	4	53	0.51	1.39	0.19	1.71	107	209
1993-94	2	49	0.56	0.87	0.15	1.28	62	92

- (a) Except for 'other' coal mines, all data relate only to deep mines operated by British Coal (formerly National Coal Board).
 (b) Number of mines producing coal at end of March each year.
 (c) Excludes tip coal.
 (d) Not including attendances at training and other non operational activities.
 (e) Average number of wage earners on colliery books during the year.
 (f) Average number of shifts worked per week per wage earner on colliery books.
 (g) Not available due to national miners' strike.

4.3 (continued) Summary of deep coal mine operations (a)

Average number of wage earners (thousands) (e)		Average number of shifts worked per week (f)		Average output per man shift		Absentee percentage in South Wales	
Overall	Under-ground	Overall	Under-ground	Overall	Under-ground		
34	26	3.39	3.21	1.27	1.74	20.9	1973-74
33	25	3.89	3.57	1.36	1.85	17.3	1974-75
32	25	3.78	3.65	1.38	1.85	18.3	1975-76
31	24	3.73	3.59	1.34	1.83	19.4	1976-77
31	23	3.71	3.58	1.32	1.81	19.2	1977-78
29	22	3.81	3.65	1.46	2.01	18.9	1978-79
28	21	3.85	3.71	1.45	2.00	16.7	1979-80
27	20	3.89	3.75	1.51	2.07	14.0	1980-81
26	20	3.95	3.82	1.53	2.08	12.8	1981-82
25	18	3.84	3.85	1.55	2.10	12.1	1982-83
23	17	3.75	3.63	1.63	2.21	12.2	1983-84
..	..	..	..	..	..	..	1984-85 (g)
18	14	4.04	3.89	1.92	2.59	13.5	1985-86
13	10	4.19	3.98	2.46	3.30	12.3	1986-87
11	8	4.25	4.06	2.34	3.11	10.7	1987-88
8	6	4.55	4.36	2.92	4.09	9.3	1988-89
5	4	4.73	4.51	3.17	4.09	8.7	1989-90
3	3	4.77	4.61	4.93	6.07	8.2	1990-91
2	1	5.05	6.00	5.38	6.46	6.7	1991-92
1	1	4.93	4.59	6.01	7.19	4.7	1992-93
1	1	5.05	5.87	9.33	10.91	7.0	1993-94

Source: Department of Trade and Industry; Office for National Statistics; British Coal

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4.4 Iron and steel production

	Blast furnaces			Steel furnaces				Capacity (thousand tonnes)
	Number (a)	Capacity (thousand tonnes)	Production of steelmaking iron (thousand tonnes)	Number (a)			Total	
				Oxygen converters	Electric (b)	Open hearth		
1974	18	5,300	4,673	8	15	38	61	7,800
1975	15	5,400	3,534	5	15	38	58	7,400
1976	15	6,000	4,531	5	17	38	60	8,100
1977	15	6,200	4,059	5	20	38	63	9,400
1978	10	5,700	3,895	5	21	12	38	8,300
1979	7	5,100	4,671	5	22	-	27	8,600
1980 (e)	7	5,600	1,609	5	22	-	27	9,300
1981	7	5,400	2,990	5	20	-	25	8,600
1982	7	5,400	2,818	5	20	-	25	8,500
1983	7	5,400	3,281	5	14	-	19	8,500
1984	7	5,400	3,298	5	14	-	19	8,700
1985	7	5,400	3,014	5	13	-	18	8,800
1986	7	5,400	3,118	5	13	-	18	8,800
1987	7	5,400	3,690	5	11	-	16	8,800
1988	7	5,400	3,761	5	10	-	15	8,800
1989	7	5,400	3,797	5	10	-	15	8,900
1990	6	5,400	3,841	5	9	-	14	9,000
1991	6	5,400	4,196	5	7	-	12	8,600
1992	6	5,400	4,195	5	7	-	12	8,600
1993	6	5,400	4,772	5	7	-	12	8,600
1994	6	5,900	4,973	5	7	-	12	9,100
1995	5	5,900	4,976	5	7	-	12	9,100
1996	5	5,900	5,847	5	7	-	12	9,000

- (a) In existence at end of year.
 (b) Includes electric arc and induction furnaces at steel foundries.
 (c) Excluding iron foundries unless they are integrated with iron and steel works.
 (d) Excludes consumption in internal combustion engines.
 (e) There was a national steel strike in 1980.

4.4 (continued) Iron and steel production

Steel furnaces				Energy consumption in iron and steel industry (c)					
Production of crude steel (thousand tonnes)				Coal (thousand tonnes)	Coke and coke breeze (thousand tonnes)	Fuel oil (thousand tonnes) (d)	Electricity (GWh)		
Oxygen converters	Electric (b)	Open hearth	Total						
3,434	479	2,793	6,705	3,778	3,087	1,200	2,996	1974	
2,832	447	2,192	5,471	3,633	2,388	1,016	2,666	1975	
3,425	493	2,430	6,348	4,240	3,006	1,053	3,012	1976	
3,247	593	2,161	6,000	3,929	2,717	926	3,066	1977	
3,627	1,039	1,374	6,039	3,455	2,599	891	3,218	1978	
4,414	1,430	1,091	6,936	3,531	2,963	879	3,784	1979	
1,891	1,060	-	2,951	2,034	1,085	424	2,347	1980 (e)	
3,520	867	-	4,386	2,231	1,908	361	2,558	1981	
3,251	886	-	4,137	2,540	1,843	334	2,478	1982	
3,821	1,032	-	4,854	2,753	2,057	282	2,657	1983	
3,844	1,176	-	5,020	2,557	2,088	221	2,710	1984	
3,502	1,229	-	4,731	2,871	1,872	186	2,653	1985	
3,540	1,309	-	4,849	2,814	1,845	211	2,907	1986	
4,212	1,219	-	5,431	2,967	2,096	245	2,915	1987	
4,296	1,381	-	5,677	2,953	2,053	339	3,101	1988	
4,252	1,540	-	5,792	2,936	2,069	375	3,437	1989	
4,247	1,334	-	5,581	2,953	2,102	323	3,132	1990	
4,586	1,109	-	5,695	2,748	2,189	494	2,828	1991	
4,562	1,182	-	5,744	2,669	2,184	437	2,828	1992	
5,185	1,252	-	6,437	2,716	2,459	467	3,103	1993	
5,462	1,248	-	6,710	2,829	2,522	531	3,094	1994	
5,493	1,214	-	6,707	2,834	2,593	496	3,179	1995	
6,256	1,274	-	7,530	2,856	2,965	496	3,284	1996	

Source: Iron and Steel Statistics Bureau

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4.5 Manufacturing local units by employment size (a)

	Units with number of employees:									
	1 to 9		10 to 19 (b)		20 to 49		50 to 99		100 to 199	
	Number of units	Employees	Number of units	Employees	Number of units	Employees	Number of units	Employees	Number of units	Employees
1974	..	..	445	..	625	..	342	..	221	..
1975	..	..	511	..	585	..	342	..	215	..
1976	..	..	565	8,041	616	19,198	329	22,766	254	35,644
1977	..	..	548	7,919	600	18,378	328	22,779	252	35,196
1978	..	..	698	9,940	591	17,837	320	22,307	259	36,465
1979	..	..	691	9,832	594	17,867	305	21,128	254	35,595
1980	..	..	..	..	..	..	..	..	..	..
1981	..	..	..	..	..	..	..	..	..	..
1982	..	..	..	..	648	19,828	298	20,872	222	30,078
1983	..	..	..	..	627	19,375	302	21,363	183	25,411
1984	..	..	..	..	618	19,044	303	21,453	194	26,749
1985	3,303	10,824	718	9,804	572	17,762	293	20,490	193	26,691
1986	3,403	10,680	744	10,236	556	17,224	312	22,006	199	28,057
1987	3,489	10,384	742	10,329	599	18,815	311	21,694	209	29,064
1988	3,652	10,667	682	9,405	631	19,537	308	21,137	239	32,885
1989	3,871	11,011	668	9,334	663	20,711	346	23,899	236	32,077
1990	3,976	11,198	634	8,992	718	22,618	359	25,095	228	31,565
1991	3,933	11,173	592	8,370	729	22,999	382	26,657	226	31,815
1992	3,696	11,690	713	9,855	702	21,675	368	25,351	229	32,046
1993	3,488	10,612	590	8,173	679	21,335	337	23,567	235	32,906
1994	4,624	12,346	740	10,116	707	22,022	358	25,058	237	32,965
1995	..	..	..	..	..	..	..	..	..	..
1996	4,515	..	845	..	665	..	320	..	225	..

- (a) A manufacturing local unit is defined as a plant or factory at a single site or address. The employment figures used to classify the manufacturing units to the size bands come from different sources, and represent the most up to date information for that unit. Units employing 1-9 persons are excluded from 1974 to 1979, and for 1983 and 1984 units employing 1-19 persons are excluded, this is due to the data being unreliable. However units in these employment size bands have been included for 1985 and later years and as a result the total number of units and employment is much higher than for previous years.
- (b) For 1974 to 1978, the size band 11-19 is included in place of the 10-19 size band.

4.5 (continued) Manufacturing local units by employment size (a)

Units with number of employees:								
200 to 499		500 to 999		1,000 and over		Total		
Number of units	Employees	Number of units	Employees	Number of units	Employees	Number of units	Employees	
229	..	61	..	56	..	1,979	..	1974
225	..	63	..	51	..	1,992	..	1975
204	60,359	65	43,892	50	116,979	2,083	306,879	1976
210	63,480	58	39,253	52	119,044	2,048	306,049	1977
198	61,401	50	35,415	49	112,587	2,165	295,952	1978
198	61,070	49	34,955	50	111,020	2,141	291,467	1979
..	..	..	..	..	..	..	..	1980
..	..	..	..	..	..	..	..	1981
153	47,435	47	34,033	37	77,358	1,405	229,604	1982
150	45,750	47	34,081	32	61,741	1,341	207,721	1983
145	44,339	45	31,793	30	58,482	1,335	201,860	1984
145	44,890	40	27,575	22	52,897	5,286	210,933	1985
151	46,607	39	27,927	22	41,767	5,426	204,504	1986
137	42,137	44	31,316	21	44,372	5,552	208,111	1987
145	44,645	47	33,769	18	37,747	5,722	209,792	1988
163	50,614	50	34,876	17	35,944	6,014	218,466	1989
177	56,150	47	33,351	18	37,123	6,157	226,092	1990
168	53,477	50	33,895	20	38,523	6,100	226,909	1991
167	52,145	52	35,998	20	42,063	5,947	230,823	1992
160	49,529	43	29,581	20	40,234	5,552	215,937	1993
171	52,518	43	29,118	18	34,990	6,898	219,133	1994
..	1995
150	..	40	..	15	..	6,780	..	1996

Source: Office for National Statistics

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4.6 Distribution of employment in manufacturing local units: subdivisinal analysis (a)

	Clwyd East		Clwyd West		Gwynedd		Gwent		Mid Glamorgan	
	Number of units	Employees	Number of units	Employees	Number of units	Employees	Number of units	Employees	Number of units	Employees
1974	181	..	69	..	106	..	316	..	496	..
1975	177	..	69	..	107	..	322	..	506	..
1976	196	37,268	67	5,646	106	10,537	340	63,819	519	69,914
1977	183	36,582	73	5,459	104	10,857	334	65,682	512	70,818
1978	197	35,159	82	6,133	110	10,879	360	63,037	541	66,895
1979	197	35,980	81	6,274	110	10,882	353	60,815	534	64,017
1980	..	..	..	..	..	..	..	..	..	..
1981	..	..	..	..	..	..	..	..	..	..
1982	159	27,523	51	6,319	66	9,802	257	51,569	331	49,660
1983	156	24,993	52	5,705	65	8,843	246	47,017	317	44,601
1984	162	24,556	50	6,041	65	8,715	245	45,029	317	45,241
1985	642	24,939	255	6,371	396	9,415	884	46,481	927	54,435
1986	650	25,457	263	6,902	407	9,244	923	48,885	969	45,267
1987	679	29,255	269	6,800	401	9,074	944	47,453	984	47,231
1988	732	30,673	266	6,817	405	9,273	973	48,008	1,035	45,414
1989	773	31,818	269	6,641	412	9,574	1,024	48,370	1,074	50,162
1990	794	34,446	281	6,727	399	9,725	1,046	49,668	1,092	52,207
1991	796	35,845	264	6,358	392	9,488	1,051	50,915	1,094	53,572
1992	756	36,338	275	6,405	390	9,359	1,025	53,546	1,070	53,144
1993	718	35,919	257	5,689	364	8,442	937	49,752	1,006	48,987
1994	864	37,429	335	6,373	485	9,677	1,136	48,274	1,212	49,352

- (a) A manufacturing local unit is defined as a plant or factory at a single site or address. The employment figures represent the most up to date information for the individual units. Units employing 1-9 persons are excluded from 1974 to 1979, and for 1983 and 1984 units employing 1-19 persons are excluded, this is due to the data being unreliable. However, units in these employment size bands have been included for 1985 and later years and as a result the total number of units and employment is much higher than for previous years.
- (b) Prior to 1988 Llanelli was included with West Glamorgan but, since 1988, was included within Dyfed.

4.6 (continued) Distribution of employment in manufacturing local units: subdivisioanal analysis (a)

South Glamorgan		West Glamorgan (b)		Powys		Dyfed (b)		Wales		
Number of units	Employees	Number of units	Employees	Number of units	Employees	Number of units	Employees	Number of units	Employees	
279	..	339	..	87	..	106	..	1,979	..	1974
278	..	335	..	88	..	110	..	1,992	..	1975
299	33,788	345	72,333	92	5,155	119	8,419	2,083	306,879	1976
298	32,522	330	70,546	92	5,414	122	8,171	2,048	306,049	1977
303	30,415	329	67,576	115	7,746	128	8,112	2,165	295,952	1978
303	30,052	324	67,803	113	7,613	126	8,031	2,141	291,467	1979
..	..	..	..	..	..	..	..	..	..	1980
..	..	..	..	..	..	..	..	..	..	1981
198	27,659	204	45,907	72	6,245	67	4,920	1,405	229,604	1982
183	25,022	187	40,348	68	6,234	67	4,958	1,341	207,721	1983
174	22,653	184	38,115	71	6,588	67	4,922	1,335	201,860	1984
709	18,633	698	35,935	319	7,949	456	6,775	5,286	210,933	1985
722	19,412	698	34,964	332	7,962	462	6,411	5,426	204,504	1986
744	19,203	707	34,995	352	8,299	472	5,801	5,552	208,111	1987
744	20,153	578	27,202	378	8,157	611	14,095	5,722	209,792	1988
793	21,058	612	29,908	398	8,369	659	12,566	6,014	218,466	1989
809	21,374	641	30,616	407	8,440	688	12,889	6,157	226,092	1990
770	20,506	653	27,365	404	8,055	676	14,805	6,100	226,909	1991
772	21,075	608	27,019	384	9,570	667	14,367	5,947	230,823	1992
706	20,157	584	25,535	342	8,244	638	13,212	5,552	215,937	1993
883	21,189	687	24,021	470	8,206	826	14,612	6,898	219,133	1994

Source: Office for National Statistics

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4.7 Assistance, loans and grants from European Community sources (a)

£ millions

	Loans		Grants			
	European Investment Bank (EIB)	European Coal and Steel Community (ECSC)	European Coal and Steel Community (ECSC)	European Social Fund (ESF)	European Agriculture Guidance and Guarantee Fund (EAGGF)	European Regional Development Fund (ERDF)
1973	14.9	-	-	2.7	0.8	-
1974	8.2	-	-	3.5	0.3	-
1975	35.0	50.6	0.8	5.0	0.3	6.2
1976	44.1	30.0	0.4	4.5	0.2	8.1
1977	12.4	1.4	1.2	7.9	1.9	6.5
1978	34.1	99.1	3.5	4.6	6.8	17.1
1979	197.4	22.0	1.6	6.8	4.1	21.7
1980	14.4	29.3	7.8	9.8	18.3	32.5
1981	0.7	51.2	17.4	1.8	30.5	24.8
1982	13.1	16.0	12.5	2.9	41.5	47.4
1983	23.1	42.6	2.0	24.5	60.7	45.1
1984	13.2	19.8	-	0.5	61.5	63.0
1985	47.1	36.2	-	3.1	59.7	54.9
1986	28.9	14.6	-	4.5	71.5	49.6
1987	41.5	..	-	5.6	67.1	53.8
1988	0.9	20.5	-	4.6	-	63.3
1989	38.7	18.4	-	-	-	19.9
1990	11.9	26.5	-	10.8	-	27.5
1991	53.0	21.3	-	12.0	-	89.1
1992	148.0	10.5	-	12.3	-	19.2
1993	15.4	10.0	-	18.0	-	128.5
1994	..	7.0	-	-	-	-
1994-97	..	..	..	..	14.7	145.8

Sources: Welsh Office; Department of Trade and Industry; Department for Education and Employment and European Commission

(a) Figures in this table relate to grants and loans which can be readily identified as having been allocated to projects in Wales. Wales also benefits from grants and loans negotiated on a UK basis of which the Welsh element cannot be easily identified. Totals indicate sums committed rather than monies received in the year concerned.

4.8 Employment in Welsh Development Agency estates and factories (a)

	Employment (thousands) (b)						Total	Factory space (1,000 m ²) (c)
	Treforest	Bridgend/ Waterton	Hirwaun	Swansea	Wrexham	Other sites		
1966	12.5	6.0	4.5	6.3	3.5	39.2	72.1	1,294
1976	9.7	6.6	3.7	6.2	5.6	28.1	59.8	1,564
1978	9.4	7.1	3.4	6.4	5.5	26.9	58.8	1,400
1979	9.1	7.4	3.5	5.7	6.2	27.1	58.9	1,472
1980	7.4	7.6	3.2	5.2	5.8	25.1	54.2	1,489
1981	6.7	6.7	3.3	4.3	5.1	22.3	48.3	1,639
1982	5.6	6.2	3.1	4.1	5.2	20.6	44.7	1,830
1983	5.2	5.6	2.7	3.7	5.4	20.6	43.2	1,847
1984	4.5	6.4	2.3	2.9	5.6	22.7	44.4	1,870
1985	4.1	6.5	2.1	2.9	5.2	23.4	44.1	1,802
1986	3.9	6.6	2.3	2.8	5.1	24.4	45.1	1,748
1987	4.5	7.7	2.1	2.5	4.2	27.7	48.6	1,681
1988	4.7	8.1	2.2	0.5	1.8	31.1	48.2	1,750
1989	4.6	6.6	2.6	0.4	2.1	29.3	45.5	1,785
1990	4.1	6.4	2.4	0.5	1.7	32.4	47.4	1,874
1991	3.9	5.7	2.1	0.5	1.7	28.9	42.7	1,907
1992	3.2	4.8	2.1	0.4	1.4	27.6	39.4	1,850
1993	3.5	4.2	1.6	0.1	0.9	21.9	32.2	1,668
1994	3.1	3.6	0.8	0.1	0.9	18.7	27.2	1,411
1995	1.8	3.1	0.8	0.1	0.6	15.5	21.9	1,137

Source: Welsh Development Agency

- (a) Figures prior to 1978 include those built by lessees under consent. The basis for recording the employment statistics changed in 1988 when employment in non agency factory units on two of the major industrial sites was excluded.
- (b) At June each year up to 1989 and then March each year from 1990.
- (c) At March each year.

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4.9 Welsh Development Agency: advanced factories completed, by county for selected years (a)

	<u>Clwyd</u>	<u>Dyfed</u>	<u>Gwent</u>	<u>Gwynedd</u>	<u>Mid Glamorgan</u>	<u>Powys</u>	<u>South Glamorgan</u>	<u>West Glamorgan</u>	<u>Wales</u>
Units:									
1978	..	..	..	..	..	..	..	..	26
1982	135	62	82	41	55	-	40	41	456
1984	12	44	11	20	23	-	-	27	137
1986	8	-	23	-	6	-	-	-	37
1990	16	-	25	10	48	-	-	21	120
1991	30	24	20	33	35	-	-	12	154
1992	9	41	12	8	29	-	-	1	100
1993	26	10	5	22	10	-	-	8	81
1994	4	-	7	16	1	-	-	16	44
1995	17	21	1	1	1	-	-	-	41
1996	3	-	1	-	1	-	-	1	6
Thousand square metres:									
1978	..	..	..	..	..	..	..	..	86.0
1982	66.8	16.4	53.9	9.4	20.1	-	40.5	22.8	229.9
1984	1.9	14.5	6.7	1.2	8.6	-	-	27.9	60.8
1986	6.9	-	6.7	-	0.6	-	-	-	14.1
1990	21.6	-	14.2	1.8	42.9	-	-	17.9	98.5
1991	13.1	7.4	22.5	8.8	31.1	-	-	7.2	90.1
1992	3.3	8.0	17.7	6.1	16.8	-	-	0.9	52.8
1993	21.5	7.7	5.9	5.9	6.6	-	-	7.9	55.5
1994	1.9	-	1.8	3.3	1.5	-	-	1.7	10.2
1995	10.6	3.2	2.3	1.4	4.6	-	-	-	22.1
1996	15.3	-	1.4	-	3.2	-	-	1.9	21.8

Source: Welsh Development Agency

(a) Factories completed in year to 31 March.

4.10 Development Board for Rural Wales: factories owned (a)

	Ceredigion		Meirionnydd		Brecknock		Montgomeryshire (b)		Radnor	
	Number	Factory space (1,000 m ²)	Number	Factory space (1,000 m ²)	Number	Factory space (1,000 m ²)	Number	Factory space (1,000 m ²)	Number	Factory space (1,000 m ²)
1978	16	9.4	12	11.8	19	39.4	50	55.8	7	14.6
1979	19	11.0	13	13.1	21	43.0	77	65.7	11	15.1
1980	29	12.3	20	13.3	33	42.8	96	75.9	12	17.4
1981	41	14.8	22	13.9	35	44.2	104	87.2	16	19.0
1982	47	16.6	38	15.6	41	45.7	117	87.8	20	19.5
1983	55	18.7	41	16.0	49	48.0	121	90.6	22	11.1
1984	64	14.7	51	17.8	53	48.7	126	91.9	32	13.3
1985	72	16.4	49	15.7	53	49.7	140	92.0	33	12.3
1986	91	17.7	55	11.4	60	48.1	177	86.7	48	13.2
1987	87	18.0	56	11.4	57	48.8	175	96.7	50	12.9
1988	85	18.0	58	12.0	62	49.2	179	85.4	54	13.5
1989	93	18.4	62	13.6	61	46.0	179	76.4	53	14.2
1990	97	18.5	63	14.0	74	46.2	186	79.1	56	15.2
1991	98	18.8	63	12.8	83	49.4	187	80.2	53	15.4
1992	98	19.3	85	15.8	89	51.0	187	78.3	54	10.5
1993	116	21.2	89	13.4	90	50.8	189	80.7	56	19.0
1994	117	21.4	90	15.2	89	54.8	188	77.6	60	18.0
1995	116	20.7	90	15.2	75	27.5	181	73.6	55	16.7
1996	114	22.0	75	17.8	51	20.4	181	70.8	63	17.8

Source: Development Board for Rural Wales

- (a) At March. The DBRW was set up in 1977 to promote the economic and social well-being of Mid-Wales, an area comprising the districts of Ceredigion in Dyfed, Meirionnydd in Gwynedd, and the County of Powys (Brecknock, Montgomery and Radnor). It covers 40 per cent of the land area of Wales but is sparsely populated (in the mid-1980s it contained about 7 per cent of the population of Wales).
- (b) The provision of factories in Montgomery was dominated by those for Newtown.

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4.11 Development Board for Rural Wales: social grants (a)

	Ceredigion		Meirionnydd		Brecknock		Montgomeryshire		Radnor	
	Projects (number)	Grants (£ thousands)	Projects (number)	Grants (£ thousands)	Projects (number)	Grants (£ thousands)	Projects (number)	Grants (£ thousands)	Projects (number)	Grants (£ thousands)
1977-78	42	35.8	34	21.1	39	39.4	90	44.7	26	6.7
1978-79	106	57.7	59	47.6	62	31.6	107	55.7	39	25.7
1979-80	..	..	..	..	..	..	..	..	..	..
1980-81	104	49.6	79	32.3	65	22.2	121	44.7	48	34.7
1981-82	..	..	..	..	..	..	..	..	..	..
1982-83	..	..	..	..	..	..	..	..	..	..
1983-84	40	66.9	35	35.6	26	48.9	58	75.3	24	39.1
1984-85	75	112.2	43	82.0	49	56.0	100	113.8	42	72.2
1985-86	48	71.7	29	59.2	23	31.0	77	187.8	26	48.7
1986-87	46	43.4	30	82.1	41	50.3	88	91.0	23	83.2
1987-88	52	122.3	38	61.9	60	80.3	96	139.1	30	97.7
1988-89	79	126.1	55	77.8	78	146.7	164	169.7	64	140.9
1989-90	128	176.2	61	81.6	74	184.3	137	127.5	49	60.1
1990-91	90	230.6	43	76.4	50	124.9	86	162.1	26	66.2
1991-92	70	248.5	37	71.1	47	205.3	90	188.6	28	144.7
1992-93	56	172.2	40	86.0	40	248.2	69	250.7	30	138.4
1993-94 (b)	81	269.0	53	90.2	54	238.0	107	271.0	45	130.7

Source: Development Board for Rural Wales

- (a) The Development Board for Rural Wales was set up in 1977 to promote the economic and social well-being of Mid-Wales, an area comprising the districts of Ceredigion in Dyfed, Meirionnydd in Gwynedd, and the County of Powys (Brecknock, Montgomery and Radnor). It covers 40 per cent of the land area of Wales but is sparsely populated (in the mid-1980s it contained about 7 per cent of the population of Wales). Grants were for 5 main categories (Youth; Community; Sport; Art and Culture; and Promotion and Events). By 1993, of the total grants of £4.7m, 44.9 per cent were for sport and 32.9 per cent for community. The grants were contributions towards projects which had a greater total value. Thus for example, Development Board for Rural Wales grants of £999,000 were made to projects in 1994 with a total value of £3,857,000. The grants include Statutory Authority social grants.
- (b) From 1993-94 the power to make social grants was transferred to local authorities.

4.12 New manufacturing plants opened between 1966 and 1996 and still in production in 1996 (a)

	Plants opened between:					
	1966-1978		1979-1996		1966-1996	
	Number of openings	Employment in 1996	Number of openings	Employment in 1996	Number of openings	Employment in 1996
UK owned investments:						
New branch plants of companies based in:						
South East	24	4,200	46	4,000	70	8,200
West Midlands	14	1,900	13	1,500	27	3,300
North West	9	1,500	7	800	16	2,300
Other	14	1,100	29	3,300	43	4,400
Wales	47	6,500	91	10,600	138	17,000
Total	108	15,100	186	20,200	294	35,300
Transfers into Wales from:						
South East	35	5,300	25	900	60	6,200
West Midlands	10	800	10	600	20	1,500
North West	8	900	15	1,400	23	2,300
Other	7	600	10	700	17	1,300
Total	60	7,600	60	3,700	120	11,400
Enterprises new to manufacturing	214	11,400	633	22,100	847	33,500
Total UK investment	382	34,100	879	46,000	1,261	80,200
Overseas investment:						
Direct first time investment into Wales (b)	44	11,500	119	19,300	163	30,800
New branch plant of an overseas company in production in Wales	8	3,000	23	2,600	31	5,600
Plant transfers into Wales from other parts of the UK	7	1,700	14	2,900	21	4,600
Total overseas investment	59	16,200	156	24,700	215	40,800
Overall total (c)	441	50,300	1,035	70,800	1,476	121,100

Source: Welsh Economic Trends and Development Board for Rural Wales

- (a) These estimates are based on new manufacturing plants, known to have opened in the period 1 January 1966 to 31 December 1996, which were still in production at the end of this period, and at which employment in 1996 was 11 or more. The ownership given is as it was at time of opening. Many subsequently changed hands. Manufacturing has been classed by the 1992 SIC.
- (b) Those plants which have opened direct from abroad or new branch plants of existing foreign owned plants in the UK.
- (c) Totals may not add due to rounding.

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4.13 New manufacturing plants which opened between 1966 and 1996 but subsequently closed

	Number of recorded openings which subsequently closed	Employment totals based on peak employment achieved
Isle of Anglesey	20	1,111
Gwynedd	50	1,945
Conwy	20	685
Denbighshire	34	1,109
Flintshire	111	5,401
Wrexham	109	7,840
Powys	102	5,068
Ceredigion	20	541
Pembrokeshire	31	1,743
Carmarthenshire	66	4,786
Swansea	70	3,961
Neath Port Talbot	101	6,223
Bridgend	61	3,473
The Vale of Glamorgan	36	1,313
Cardiff	91	4,176
Rhondda, Cynon, Taff	141	9,868
Merthyr Tydfil	40	2,618
Caerphilly	164	11,857
Blaenau Gwent	112	5,715
Torfaen	110	6,082
Monmouthshire	24	862
Newport	62	3,385
Wales	1,575	89,800

Source: Welsh Economic Trends and Development Board for Rural Wales