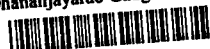


BOARD OF TRADE
AN
INDUSTRIAL SURVEY
OF
SOUTH WALES

MADE FOR THE BOARD OF TRADE BY
UNIVERSITY COLLEGE OF
SOUTH WALES AND
MONMOUTHSHIRE

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1932

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UNIVERSITY COLLEGE OF SOUTH WALES AND
MONMOUTHSHIRE.

University College,
Cathays Park,
Cardiff.

22nd December, 1931.

*To the Rt. Hon. Walter Runciman, M.P.,
President of the Board of Trade.*

SIR,

By a letter from the Board of Trade dated the 25th March, 1931, the University College of South Wales and Monmouthshire was invited to conduct an industrial survey of the South Wales area. At the same time, it was intimated that our enquiries should be directed towards the production of a report which should include—

- (a) a survey of the present industrial position of the area;
- (b) the prospects of early expansion and new developments, having regard particularly to new industrial developments within recent years, and
- (c) so far as practicable, an assessment of the prospective employment capacity of the various industries in the area as a basis for an estimate of the volume of labour likely to be surplus to the requirements of individual industries within the next few years.

We now have the honour to submit the accompanying report on the above matters.

We have the honour to be,

Sir,

Your obedient Servants,

J. F. REES,
Principal of the College.

H. A. MARQUAND,
Professor of Industrial Relations and
Director of the Survey.

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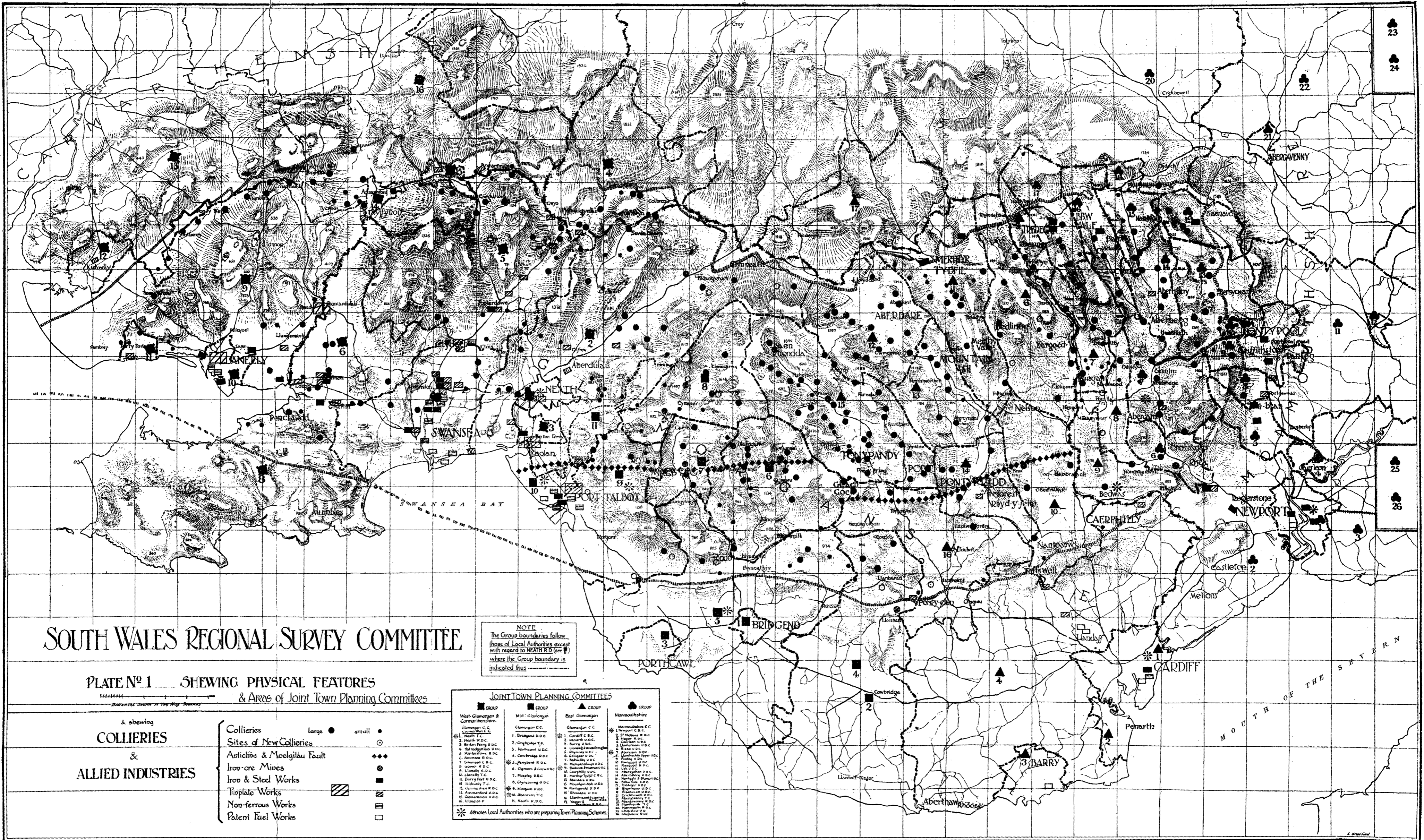
NOTE.

In presenting our report we desire to acknowledge the assistance rendered to the Staff of the University College by other collaborators. Mr. P. S. Thomas undertook the preparation of the section dealing with the metal trades. Mr. C. A. Speller wrote the chapter on Agriculture. Mr. Brinley Thomas wrote a large portion of the chapter on Coal mining, particularly the section dealing with employment. Mr. Gwynne Meara was a valued assistant at all stages of the work. Other ladies and gentlemen kindly assisted in the gathering of information and the preparation of tables. To the local officials of Government departments and the officials of the Great Western Railway Company, the Cardiff Chamber of Commerce and other bodies our thanks are also due.

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SOUTH WALES REGIONAL SURVEY COMMITTEE

PLATE No. 1 SHEWING PHYSICAL FEATURES & Areas of Joint Town Planning Committees

showing
COLLIERIES
&
ALLIED INDUSTRIES

- Collieries large ● small ○
- Sites of New Collieries ○
- Anticline & Moelgibau Fault ◆◆◆
- Iron-ore Mines ●
- Iron & Steel Works ■
- Tipplate Works ▨
- Non-ferrous Works ▩
- Patent Fuel Works □

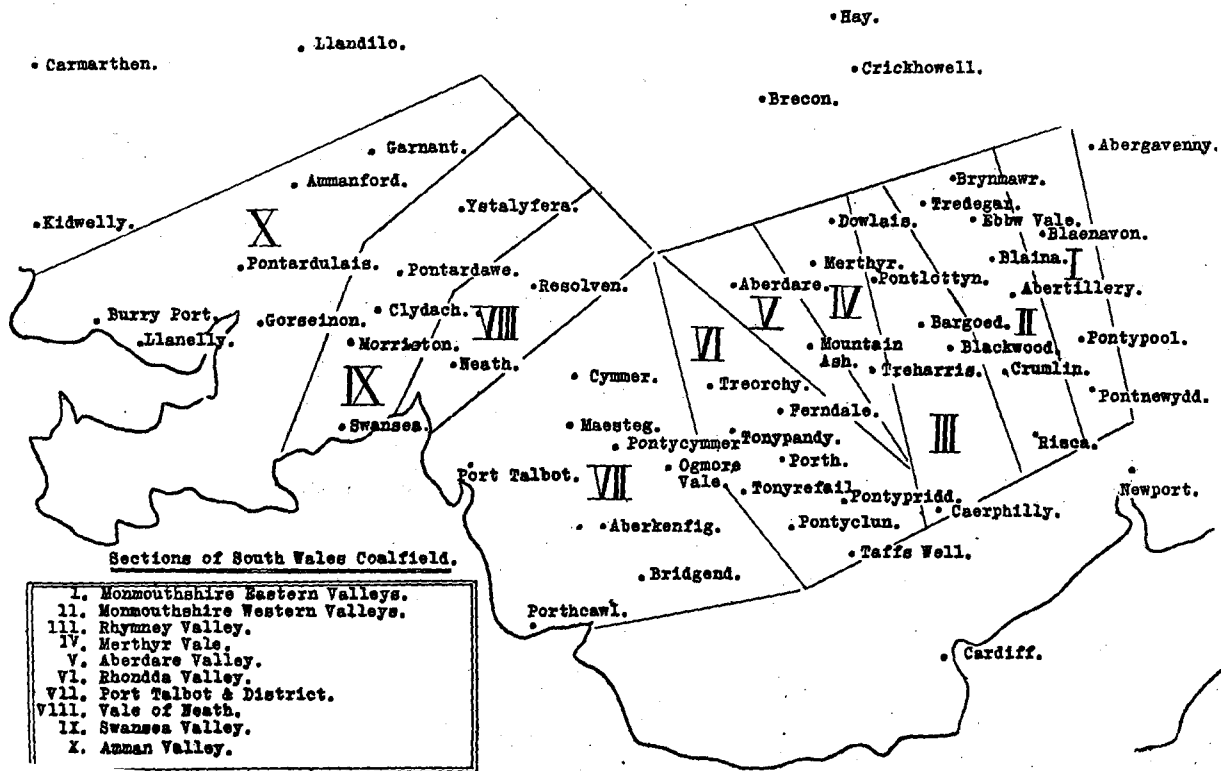
NOTE
The Group boundaries follow those of Local Authorities except with regard to NEATH R.D. (see #) where the Group boundary is indicated thus - - - - -

JOINT TOWN PLANNING COMMITTEES			
GROUP	GROUP	GROUP	GROUP
West Glamorgan & Carmarthenshire	Mid Glamorgan	East Glamorgan	Monmouthshire
Glamorgan C.C. Neath T.C. 2. Neath R.D. 3. Brklyn Ferry U.D.C. 4. Ystradgynlais T.C. 5. Porthkerry R.D.C. 6. Gwenton R.D.C. 7. Simonson C.C. 8. Gwenton R.D.C. 9. Llanelly R.D.C. 10. Llanelly T.C. 11. Barry T.C. 12. Kidwelly T.C. 13. Carmarthen R.D.C. 14. Ammanford U.D.C. 15. Glynneath U.D.C. 16. Llanelly F.	Glamorgan C.C. 1. Bridgend U.D.C. 2. Cynffig T.C. 3. Porthkerry U.D.C. 4. Cowbridge R.D.C. 5. Glynneath R.D.C. 6. Glynneath U.D.C. 7. Maesteg U.D.C. 8. Glynneath U.D.C. 9. Glynneath U.D.C. 10. Mountain Ash U.D.C. 11. Mountain Ash U.D.C. 12. Mountain Ash U.D.C. 13. Mountain Ash U.D.C. 14. Mountain Ash U.D.C. 15. Mountain Ash U.D.C. 16. Mountain Ash U.D.C. 17. Mountain Ash U.D.C. 18. Mountain Ash U.D.C. 19. Mountain Ash U.D.C. 20. Mountain Ash U.D.C.	Glamorgan C.C. 1. Cardiff C.B.C. 2. Penarth U.D.C. 3. Barry U.D.C. 4. Llanelli & Glynneath 5. Barry U.D.C. 6. Llanelli & Glynneath 7. Barry U.D.C. 8. Barry U.D.C. 9. Barry U.D.C. 10. Barry U.D.C. 11. Barry U.D.C. 12. Barry U.D.C. 13. Barry U.D.C. 14. Barry U.D.C. 15. Barry U.D.C. 16. Barry U.D.C. 17. Barry U.D.C. 18. Barry U.D.C. 19. Barry U.D.C. 20. Barry U.D.C.	Monmouthshire E.C. 1. Newport C.B.C. 2. Newport R.D.C. 3. Newport R.D.C. 4. Newport R.D.C. 5. Newport R.D.C. 6. Newport R.D.C. 7. Newport R.D.C. 8. Newport R.D.C. 9. Newport R.D.C. 10. Newport R.D.C. 11. Newport R.D.C. 12. Newport R.D.C. 13. Newport R.D.C. 14. Newport R.D.C. 15. Newport R.D.C. 16. Newport R.D.C. 17. Newport R.D.C. 18. Newport R.D.C. 19. Newport R.D.C. 20. Newport R.D.C.

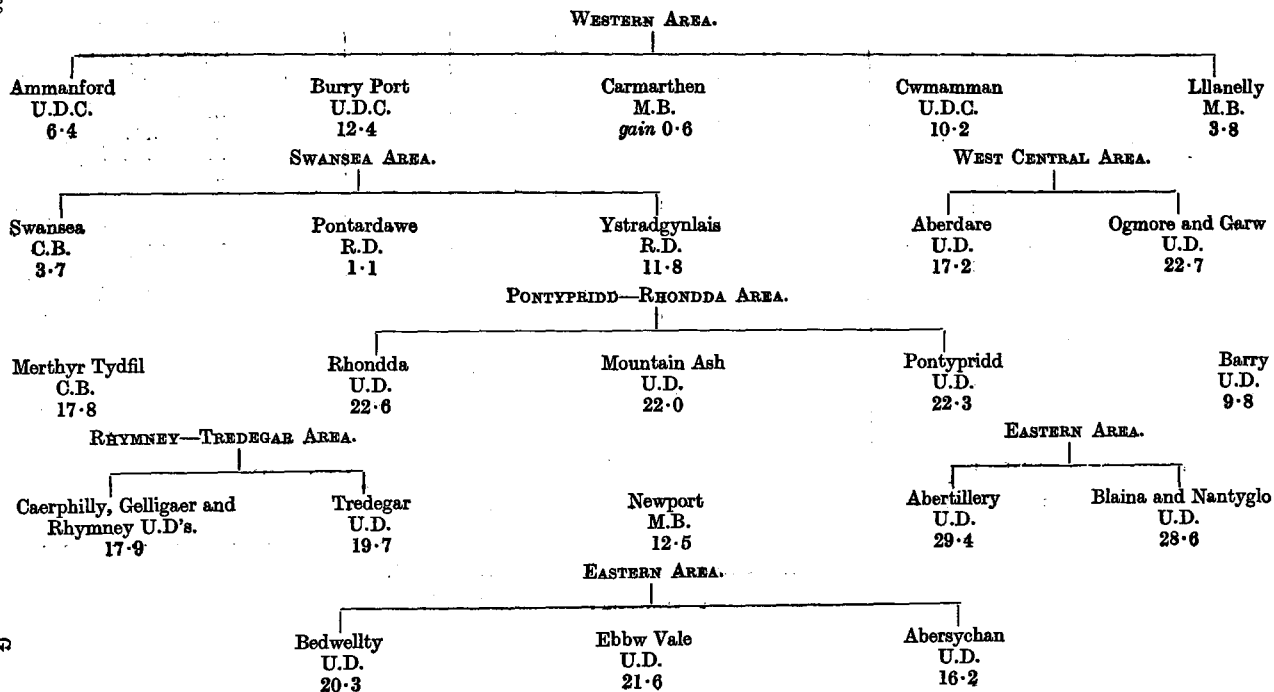
* denotes Local Authorities who are preparing Town Planning Schemes

APPENDIX 3.

SECTIONS OF SOUTH WALES COALFIELD SHOWING
MINISTRY OF LABOUR OFFICES.



APPENDIX 4.
PERCENTAGE LOSS OF 1921 POPULATION BY MIGRATION, 1921-1931, FOR CERTAIN TOWNS AND DISTRICTS OF THE INDUSTRIAL REGION.



APPENDIX 5.

I. ANALYSIS OF MALE OCCUPATIONS (1921 CENSUS).

Area.	Total Occupied Males aged 12 and over.	Percentage of Total Occupied Males (12 years and over) engaged in :—								
		Agri- culture.	Mining and Quarry- ing.	Metal Work.	Food, Drink and Tobacco.	Builders, Brick- layers, Con- tractors, etc.	Transport and Communi- cation.	Com- mercial Finance, Clerks, Typists, etc.	Pro- fessional (excluding clerks).	All Others.
Monmouthshire (Administrative County)	122,360	6.2	49.9	9.9	0.7	3.9	5.5	6.0	1.6	15.9
Newport C.B.	31,096	0.7	1.0	20.9	1.5	5.2	23.5	13.2	2.3	31.5
Glamorganshire (Administrative County)	271,872	3.1	52.0	8.6	0.7	3.5	7.1	7.6	2.0	15.4
Cardiff C.B.	69,357	0.6	1.2	11.8	1.9	4.3	26.8	16.6	2.6	34.2
Merthyr C.B.	27,239	0.9	53.2	12.2	0.8	3.3	5.2	7.8	1.7	14.7
Swansea C.B.	52,629	1.5	7.7	22.8	1.2	3.9	16.6	13.2	2.7	30.3
Carmarthenshire ...	57,466	18.6	25.4	16.5	0.7	4.3	6.7	7.5	2.6	17.7
(Administrative County)										
Brecknockshire (Administrative County)	20,691	23.2	31.1	5.1	0.9	5.5	6.7	7.8	2.6	17.0

APPENDIX 5.

II. ANALYSIS OF FEMALE OCCUPATIONS (1921 CENSUS).

Area.	Total Occupied Females aged 12 and over.	Percentage of Total Occupied Females (12 years and over) engaged in :—								
		Agriculture.	Metal Work.	Food, Drink, Tobacco.	Transport and Communication.	Commercial Finance, Clerks, Typists.	Professional (excluding clerks).	Personal Service.	Textile goods and Dress.	All Others.
Monmouthshire (Administrative County)	19,544	3·4	1·6	0·7	1·0	23·3	13·2	44·6	7·4	4·7
Newport C.B.	8,823	0·2	0·5	3·1	2·0	26·5	9·0	40·7	8·7	9·1
Glamorganshire ... (Administrative County)	47,219	1·8	3·4	0·9	1·4	23·8	12·8	40·8	10·6	4·5
Cardiff C.B.	22,921	0·2	0·6	3·4	2·0	29·0	8·1	36·6	10·6	9·6
Merthyr C.B.	4,713	0·4	0·8	1·1	1·0	26·1	14·1	40·4	9·9	5·8
Swansea C.B.	14,374	0·6	5·8	1·2	1·9	26·0	10·1	38·4	10·0	5·8
Carmarthenshire ... (Administrative County)	15,171	15·7	8·2	0·6	1·0	15·2	7·9	34·2	12·2	4·9
Brecknockshire (Administrative County)	5,051	8·1	0·6	0·4	1·0	15·2	12·6	50·9	8·1	2·9

APPENDIX 6.

THE NUMBERS OF FACTORIES AND WORKSHOPS IN THE SOUTH WALES INDUSTRIAL REGION FACTORY INSPECTORATE DISTRICTS OF SWANSEA, NEWPORT AND CARDIFF) WITH COMPARISONS FOR GREAT BRITAIN AND LONDON.

Year.	South Wales.*			London.			Great Britain.		
	Factories.	Workshops.	Percentage of Factories to total.	Factories.	Workshops.	Percentage of Factories to total.	Factories.	Workshops.	Percentage of Factories to total.
1921... ..	3,761	6,301	37·4	24,170	32,977	42·3	135,356	146,266	48·0
1922... ..	3,809	6,255	37·8	24,237	33,218	42·2	137,858	145,684	48·6
1923... ..	3,949	5,795	40·4	24,750	32,551	43·2	139,920	140,850	49·8
1924... ..	3,952	5,251	42·9	25,648	30,389	45·8	142,494	133,729	51·6
1925... ..	4,051	5,041	44·5	26,309	29,126	47·5	144,361	129,793	52·6
1926... ..	4,078	4,806	45·9	26,698	28,200	48·6	145,411	121,861	54·4
1927... ..	3,986	4,656	46·1	27,722	27,317	50·4	147,501	117,066	55·7
1928... ..	3,832	4,205	47·6	28,533	26,073	52·2	149,532	112,049	57·1
1929... ..	3,842	3,908	49·5	29,983	25,506	54·1	152,453	108,323	58·4

* Textile factories not included : these are quite insignificant in number.

APPENDIX 7.

OUTPUT AND EXPORTS OF COAL FOR THE UNITED KINGDOM AND SOUTH WALES. (BRISTOL CHANNEL PORTS.)

Year.	U.K. Output. (Thousand Tons.)	S. Wales and Mon. Output. (Thousand Tons.)	S. Wales Output as per- centage of U.K. Output.	U.K. Exports. (Tons.)	U.K. percentage of Exports to Output.	S. Wales and Mon. Exports. (Tons.)	S. Wales per- centage of Exports to Output.	S. Wales Exports as per- centage of U.K. Exports.	U.K. Output Index.	S. Wales Output Index.	U.K. Exports Index.	S. Wales Exports Index.
1913	287,430	56,830	19.8	73,400,118	26	29,875,916	53	40.7	107	111	119	116
1920	229,532	46,249	20.1	24,931,853	11	15,470,392	33	62.0	86	91	40	60
*1921	163,251	30,572	18.7	24,660,552	15	12,246,650	40	49.6	61	60	40	48
1922	249,607	50,325	20.2	64,198,384	25	25,633,826	51	39.9	93	98	104	100
1923	276,001	54,252	19.6	79,459,469	28	30,119,942	55	37.8	103	106	129	117
1924	267,118	51,085	19.1	61,651,273	23	25,682,340	50	41.6	100	100	100	100
1925	243,176	44,630	18.3	60,817,118	21	21,453,714	48	42.2	91	87	82	84
†1926	126,279	20,273	16.0	20,596,372	16	9,295,089	46	45.1	47	40	33	36
1927	251,232	46,256	18.4	51,149,193	20	22,592,482	49	44.1	94	91	83	88
1928	237,472	43,312	18.2	50,051,195	21	21,414,531	49	42.7	89	85	81	85
1929	257,907	48,150	18.6	60,266,618	23	24,715,928	51	41.0	97	94	98	96
1930	247,538	45,875	18.5	54,879,479	22	23,298,599	51	42.4	93	90	89	91

* Dispute.

† 1926 Dispute, 1st May to 30th November.

APPENDIX 8.

FOREIGN AND COASTWISE COAL SHIPMENTS—*continued.*

II. COASTWISE COAL SHIPMENTS.

Year.	Coal as Cargo.					Coal Shipped as Bunkers.				
	Bristol Channel.	United Kingdom.	Bristol Channel Shipments as percentage of United Kingdom Shipments.	Bristol Channel Index Number.	Bristol Channel Shipments as percentage of South Wales Output.	Bristol Channel.	United Kingdom.	Bristol Channel Shipments as percentage of United Kingdom Shipments.	Bristol Channel Index Number.	Bristol Channel Shipments as percentage of South Wales Output.
	Tons.	Tons.				Tons.	Tons.			
1913 ...	3,718,605	20,450,917	18	189	7	263,006	2,402,398	11	142	0·5
1920 ...	5,565,720	18,733,714	30	283	12	325,682	1,703,017	19	176	0·7
*1921 ...	1,870,305	11,413,953	16	95	6	170,501	1,234,003	14	92	0·6
1922 ...	2,196,778	14,574,605	15	112	4	209,148	1,630,893	13	113	0·4
1923 ...	1,963,334	13,122,666	15	100	4	189,841	1,445,536	13	103	0·3
1924 ...	1,970,385	14,743,419	13	100	4	185,013	1,481,577	12	100	0·4
1925 ...	1,668,050	14,378,238	12	85	4	166,373	1,352,544	12	90	0·4
†1926 ...	721,918	7,584,468	10	37	4	78,674	860,271	9	43	0·4
1927 ...	1,655,643	16,338,103	10	84	4	132,589	1,368,042	10	72	0·3
1928 ...	1,668,579	17,196,109	10	85	4	133,825	1,403,986	10	72	0·3
1929 ...	1,735,554	18,947,456	9	88	4	149,186	1,550,728	10	81	0·3
1930 ...	1,608,235	18,419,564	9	82	4	147,431	1,450,198	10	80	0·3

* Dispute.

† 1926 Dispute, 1st May to 30th November.

APPENDIX 9.
THE TRADE OF THE PORTS.
I. TRADE OF SWANSEA DOCKS.

Year.	No. of Vessels.	Registered Tonnage.	Total Imports. Tons.	Exports.					Imports and Exports. Tons.
				Coal and Coke. Tons.	Patent Fuel. Tons.	General Merchandise. Tons.	Timber. Tons.	Total Exports. Tons.	
1924*	5,425	3,971,285	1,810,137	3,524,508	474,969	69,056	621,524	5,577,764†	7,387,100
1920	100	55	27	63	241	29	52	69	58
1921	62	48	40	49	80	32	30	46	45
1922	97	81	72	92	130	73	67	90	86
1923	112	104	98	111	12	87	69	105	109
1924	100	100	100	100	100	100	100	100	100
1925	86	95	94	92	89	106	88	96	95
1926	55	71	105	35	52	92	54	53	65
1927	85	101	115	93	135	112	72	102	108
1928	80	94	94	81	119	106	79	92	95
1929	97	108	83	112	151	100	84	112	108
1930	93	106	81	106	96	77	70	97	92

† Figures for the export of iron and steel rails and ironwork, cement, oil, grain and fish have not been included in this table, but the exports of these commodities are dealt with in the text.

II.—TRADE OF BUTE DOCKS.

Year.	No. of Vessels.	Registered Tonnage.	Total Imports. Tons.	Exports.					Imports and Exports. Tons.
				Coal and Coke. Tons.	Patent Fuel. Tons.	Iron and Steel Rails and Ironwork. Tons.	General Merchandise. Tons.	Total Exports. Tons.	
1924*	6,367	4,693,023	2,066,607	7,684,400	423,518	62,133	172,540	8,342,591	10,404,191
1913	141	129	100	137	168	292	76	139	137
1920	177	99	79	68	135	182	77	72	77
1921	110	65	46	50	57	53	70	51	51
1922	95	94	72	92	78	87	78	91	88
1923	100	104	102	111	80	161	107	109	109
1924	100	100	100	100	100	100	100	100	100
1925	89	85	89	86	113	109	96	87	88
1926	65	57	90	37	47	101	73	39	40
1927	88	91	97	94	107	126	71	95	95
1928	79	87	81	91	75	106	86	90	88
1929	81	87	93	93	82	111	78	93	93
1930	78	81	80	82	76	74	64	82	81

* The figures on this line are quantitative, those below are indices—1924=100.

APPENDIX 9.

THE TRADE OF THE PORTS—*continued.*

III.—TRADE OF NEWPORT DOCKS.

Year.	No. of Vessels.	Registered Tonnage.	Total Imports. Tons.	Exports.					Imports and Exports. Tons.
				Coal and Coke. Tons.	Iron. Tons.	Tinplates. Tons.	Sundries. Tons.	Total Exports. Tons.	
1924*	3,896	3,301,876	1,025,099	5,650,286	223,572	44,624	14,120	5,932,602	6,957,701
1920	72	84	57	77	36	24	244	76	73
1921	110	58	35	52	26	177	41	51	49
1922	108	99	45	109	73	70	131	108	99
1923	106	110	85	119	111	105	129	119	114
1924	100	100	100	100	100	100	100	100	100
1925	60	91	88	85	118	86	205	87	87
1926	112	61	115	39	80	84	194	41	52
1927	89	95	105	88	153	120	260	91	93
1928	109	90	80	85	125	111	273	89	86
1929	111	98	85	93	118	130	456	95	93
1930	95	92	65	89	81	146	330	90	86

IV.—TRADE OF BARRY DOCKS.

Year.	No. of Vessels.	Registered Tonnage.	Total Imports. Tons.	Exports.			Imports and Exports. Tons.	
				Coal and Coke. Tons.	General Merchandise. Tons.	Total Exports. Tons.		
1924*	...	3,367	4,112,100	463,007	9,052,443	87,737	9,140,180	9,603,187
1913	...	97	117	141	122	36	121	122
1920	...	118	102	80	76	97	76	76
1921	...	83	81	62	62	62	62	62
1922	...	107	112	102	108	84	108	107
1923	...	112	115	118	112	97	112	112
1924	...	100	100	100	100	100	100	100
1925	...	84	80	76	79	111	79	79
1926	...	51	43	137	33	103	34	39
1927	...	88	90	83	87	110	87	87
1928	...	93	92	69	88	121	88	88
1929	...	94	98	66	96	114	96	95
1930	...	95	89	77	85	126	85	85

* The figures on this line are quantitative, those below are indices—1924 = 100.

THE TRADE OF THE PORTS—*continued.*

V.—TRADE OF PORT TALBOT DOCKS.

Year.	No. of Vessels.	Registered Tonnage.	Total Imports. Tons.	Exports.				Im Ex T
				Coal and Coke. Tons.	Patent Fuel. Tons.	General Merchandise. Tons.	Total Exports. Tons.	
1924*...	1,773	1,134,589	560,507	2,282,703	67,402	23,967	2,374,072	2,9
1920 ...	76	87	34	70	313	183	78	
1921 ...	50	45	24	35	156	116	39	
1922 ...	82	96	49	92	173	237	96	
1923 ...	83	113	78	121	No figures.	170	118	
1924 ...	100	100	100	100	100	100	100	
1925 ...	90	92	71	91	167	96	93	
1926 ...	44	45	54	38	49	41	38	
1927 ...	92	96	60	96	94	91	96	
1928 ...	87	79	67	74	26	179	74	
1929 ...	102	106	90	100	41	229	100	
1930 ...	104	110	107	105	158	162	107	

* The figures on this line are quantitative, those below are indices—1924=100.

APPENDIX 10.

NUMBERS OF PERSONS IN RECEIPT OF POOR LAW RELIEF IN CERTAIN POOR LAW UNIONS, WHOSE BOUNDARIES CORRESPOND ROUGHLY WITH THOSE OF THE INDUSTRIAL REGION.

Date.	Total in receipt of Relief in Institutions.	Numbers in receipt of Relief (Domiciliary) (excluding Casuals).			Casuals.	Total in receipt of Relief.
		Relieved otherwise than on account of Unemployment.	Relieved on account of Unemployment.	Total in receipt of Domiciliary Relief.		
1st Jan., 1922	9,827	45,106	63,510	108,616	294	118,737
" 1923	10,177	52,963	37,859	90,822	351	101,350
" 1924	10,607	53,511	17,887	71,398	330	82,335
" 1925	10,492	57,119	26,879	83,998	309	94,799
" 1926	10,630	62,648	54,744	117,392	267	128,289
" 1927	11,262	57,759	112,398	170,157	380	181,799
" 1928	11,197	52,898	30,258	83,156	315	94,668
" 1929	11,160	54,984	27,563	82,547	267	93,974
" 1930	11,063	59,082	17,481	76,563	228	87,854

APPENDIX 11.

Loss of Land Used for Agricultural Purposes.

The total of land used for agricultural and pastoral purposes includes improved land in farms, some of which is cultivated as arable for annual crops, and some of which is used for permanent pasture. In the Statistics, except where otherwise stated, arable includes clover and rotation grasses. The total area for pasture and hay is therefore greater than the area of permanent pasture. In addition to the improved land on farms there is "mountain and heath land used for grazings," commonly known as "rough grazings." This is used for pastoral purposes, and mainly for sheep.

In Carmarthenshire, in 1930, the total of improved land represents 80 per cent. of the total land in agricultural and pastoral use; or, alternatively, there are, on the average, 25 acres of rough grazings to each 100 acres of improved land (total cultivated area). The same proportions hold good for Monmouthshire, but the improved farm land of Glamorganshire is only 64 per cent. of the total land in farm use in this county: rough grazings averaging 62 acres per 100 acres of improved land.

These changes have been:—

				<i>Total Cultivated Area. acres.</i>	<i>Rough Grazings. acres.</i>	<i>Total Farm Land. acres.</i>
Carmarthen—						
1913	...	...	...	437,143	68,738	505,881
1923	...	...	...	413,134	93,318	506,452
1926	...	...	...	409,890	98,234	508,124
1930	...	...	...	406,600	100,417	507,017
Glamorgan—						
1913	...	...	...	261,048	127,514	388,562
1923	...	...	...	226,621	135,519	362,140
1926	...	...	...	223,620	139,357	362,977
1930	...	...	...	223,359	138,635	361,994
Monmouth—						
1913	...	...	...	236,619	36,715	273,334
1923	...	...	...	218,287	50,305	268,592
1926	...	...	...	213,720	51,182	264,902
1930	...	...	...	215,760	54,308	270,068

Variations between the two classes of land arise from a certain difficulty in distinguishing clearly between rough grazing land and permanent pasture. The result is that the same areas are returned sometimes in one category and sometimes in the other. The general inclination is towards a rise in the standard of judgment as to what is improved pasture, as distinct from rough grazings, and, consequently, to increase the estimate of the latter at the expense of the former. There may, however, be some general deterioration of pasture land, and its subsequent return as rough grazings must also be considered as a contributing factor.

APPENDIX 12.

Changes in Acreage of Crops and Numbers of Live Stock per 100 Acres of Total Cultivated Land in the Industrial and Non-Industrial Areas of South Wales.

Land.		Corn Crops.	Roots and Potatoes.	Other Crops.	Total Arable Land.	Perma- nent Grass.	Total Crops and Grass.
Carmarthenshire—							
Industrial Area	1913	8.7	1.7	4.9	15.3	84.7	100.0
	1930	6.2	1.4	4.3	11.9	88.1	100.0
Other Parts	1913	11.8	2.2	7.8	21.8	78.2	100.0
	1930	9.6	1.8	6.1	17.5	82.5	100.0
Whole County	1913	9.6	1.8	5.7	17.1	82.9	100.0
	1930	7.1	1.5	4.9	13.5	86.5	100.0
Glamorganshire—							
Whole County	1913	7.4	3.3	7.8	18.5	81.5	100.0
	1930	6.5	3.2	9.1	18.8	81.2	100.0
Monmouthshire—							
Industrial Area	1913	5.3	2.6	3.7	11.6	88.4	100.0
	1930	4.3	2.1	4.8	11.2	88.8	100.0
Other Parts	1913	8.2	3.0	6.1	17.3	82.7	100.0
	1930	6.4	2.3	6.7	15.4	84.6	100.0
Whole County	1913	6.4	2.7	4.6	13.7	86.3	100.0
	1930	4.3	2.1	4.8	11.2	88.8	100.0
Live Stock.		Horses.	Cattle.			Sheep.	Pigs.
			Cows and Heifers.	Other Cattle.	Total.		
Carmarthenshire—							
Industrial Area	1913	5.7	11.1	15.0	26.1	64.6	6.7
	1930	4.3	14.7	13.5	28.2	82.3	6.3
Other Parts	1913	5.3	11.2	16.4	27.6	47.2	8.6
	1930	3.9	14.7	13.9	28.6	54.1	7.4
Whole County	1913	5.6	11.1	15.4	26.5	59.8	7.2
	1930	4.2	14.7	13.6	28.3	74.3	6.6
Glamorganshire—							
Whole County	1913	6.7	9.2	11.7	20.9	114.5	5.3
	1930	5.5	13.3	12.5	25.8	145.1	7.2
Monmouthshire—							
Industrial Area	1913	6.5	8.0	12.6	20.6	103.8	5.7
	1930	5.1	10.5	12.3	22.8	119.7	7.3
Other Parts	1913	5.6	6.5	14.1	20.6	58.0	5.7
	1930	3.9	8.5	14.5	23.0	75.0	7.0
Whole County	1913	6.2	7.5	13.1	20.6	87.1	5.7
	1930	4.6	9.7	13.2	22.9	102.6	7.2

APPENDIX 13.

*Changes in Crops and Live Stock per 100 Acres of Total Cultivated Area.**(Whole Counties.)*

	Carmarthenshire.			Glamorganshire.			Monmouthshire.		
	1910-14.	1920-24.	1925-29.	1910-14.	1920-24.	1925-29.	1910-14.	1920-24.	1925-29.
Corn Crops...	9.6	10.1	7.1	7.6	10.5	6.7	6.9	8.9	5.4
Roots and Potatoes.	1.9	1.8	1.6	8.5	8.9	8.6	2.8	3.0	2.5
Rotation Crops.	5.8	6.1	4.8	7.0	8.8	7.8	4.1	5.1	4.8
Grasses.									
Other Crops	0.8	0.6	0.5	0.7	1.2	1.0	0.6	1.6	1.9
Total Arable	17.1	18.6	18.5	18.8	24.4	18.8	14.4	18.6	14.1
Permanent Pasture.	82.9	81.4	86.5	81.2	75.6	81.2	85.6	81.4	85.9
Total Crops and Grass.	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Horses ...	4.5	5.6	4.4	6.7	7.5	6.8	6.1	6.7	5.8
Cows and Heifers	11.8	13.7	14.1	9.9	11.9	13.0	7.8	9.1	10.0
Other Cattle	15.8	14.4	14.7	11.8	11.9	12.7	12.9	12.6	18.7
Total Cattle	27.1	28.1	28.8	21.7	23.8	25.7	20.7	21.7	23.7
Sheep ...	62.8	62.6	71.8	123.2	115.0	135.4	95.7	82.2	98.4
Pigs... ..	8.0	7.6	7.8	6.0	7.6	7.8	6.6	8.2	7.8

Population and Land Surface not used for Agriculture.

	Proportion of "Rural" to Total Population. (per cent.)	Persons per 100 Acres of Land Surface. (approx.)	Proportion of Land Surface not used for Agricultural Purposes. (per cent.)
Carmarthen ...	58.4	30	13
Glamorgan ...	17.7	242	30
Monmouth ...	10.4	129	23
Wales	31.5	72	14

APPENDIX 15.

**Number of Agricultural Holdings and Number of People
Engaged in Agriculture.**

The chief sources of statistical information about the organisation of agriculture are the *Census* and the *Agricultural Statistics* of the Ministry of Agriculture. It sometimes appears that there is disagreement between the respective data obtainable from these sources, but, on closer examination, some of this apparent lack of harmony disappears, and reasons for differences can be seen quite clearly.

If, for instance, (a) the number of agricultural holdings in the *Statistics* and (b) the number of "farmers and graziers" recorded in the *Census* are compared, the result will be found to be as follows:—

<i>County.</i>	<i>Number of Agricultural Holdings of over 1 acre.</i>	<i>Farmers and Graziers. Male and Female.</i>
Carmarthen	8,766	5,929
Glamorgan	5,012	3,249
Monmouth	4,329	2,691

The number of agricultural holdings is in excess of the number of farmers and graziers because, at least, some farmers have two distinct "holdings," that is, they occupy two, or possibly more, separate parcels of land on separate agreements, and, possibly, under separate owners. It is understood that where two such "holdings" are in one parish, and worked as one "farm unit," the Ministry endeavours to state them as one "holding." Where, however, they are in two parishes they may be stated as two "holdings." They may, or may not, be two separate "farm units" in production, but, in any case, they are one "business unit" represented by one farmer or grazier in the *Census*.

But the more important reason for lack of harmony is that the Ministry is obliged to record the use of all the land in holdings over one acre in extent. Many of these are held by persons who have another occupation besides the cultivation or management of land. When the *Census* records are taken such persons will be returned under the classification of their *main* occupation. Thus, an anthracite miner, working full-time, but having a holding with, say, two cows, some poultry, and possibly some sheep, managed by himself and his wife, will be returned as a mine worker, and his wife will be returned as "married (in domestic occupation)." This type of holding is very common in some of the higher, and industrial districts of South Wales: such combinations, in a whole host of rural and semi-industrial farms are found over the whole of the Survey Area.

It should be noted, further, that in recording "labour" the *Statistics* of the Ministry of Agriculture do not include the "occupiers" of holdings, or their wives. Those persons recorded are returned as "regular" and "casual" workers under these classifications; (a) Males 21 years and over, (b) Males under 21 years, and (c) Women and Girls. But here no distinction is made between *wage-earning employees* and *relatives of occupiers* of farm holdings (farmers and graziers). The *Census*, on the other hand, returns, by sex:

- (a) Farmers and Graziers;
- (b) their Relatives, and
- (c) Employees.

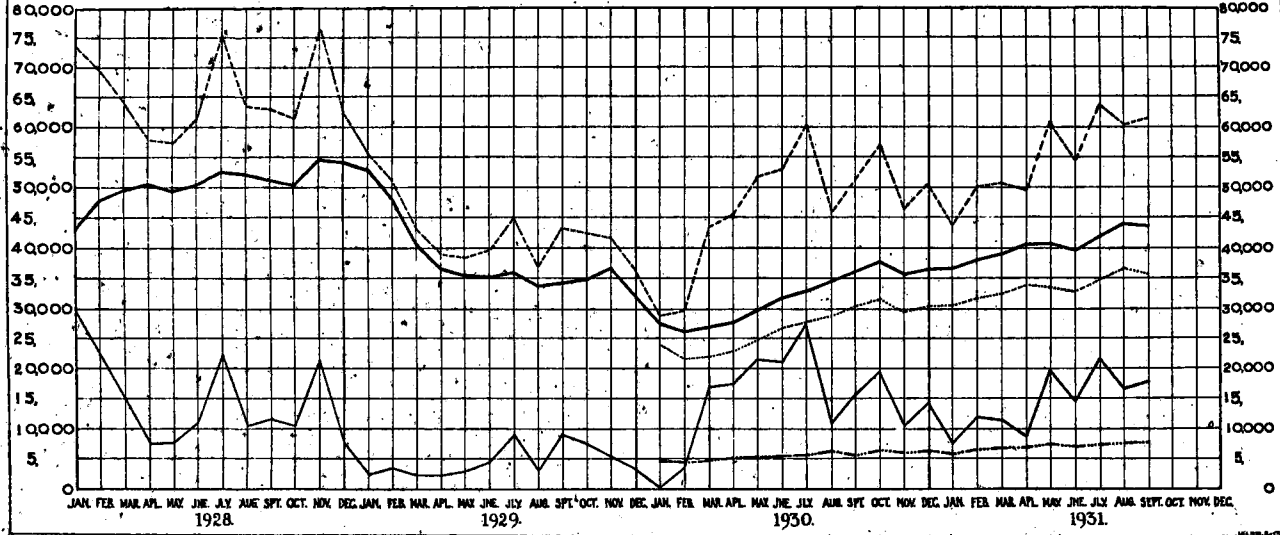
The brief statement of Persons Occupied in Agriculture, Census of 1921, is as follows :

	Farmers and Graziers.		Relatives.		Employees.		Total 1921.	
	Males.	Females.	Males.	Females.	Males.	Females.	Males.	Females.
Carmarthen	5,087	842	2,142	807	2,926	710	10,155	2,359
Glamorgan ...	2,874	375	1,126	266	3,188	240	7,188	881
Monmouth ...	2,419	272	908	178	2,995	156	6,322	606
	10,380	1,489	4,176	1,251	9,109	1,106	23,665	3,846

SOUTH WALES INDUSTRIAL SURVEY REGION.

UNEMPLOYMENT IN THE COAL INDUSTRY - JAN. 1928 TO SEPT. 1931.

<i>Wholly unemployed.</i>	<i>(Below ground Jan. 1930-Sept. 1931)</i>	
"	<i>Above " " " " "</i>	
"	<i>(Total)</i>	
<i>Temporarily stopped.</i>	<i>(Below and above ground)</i>	
<i>Total unemployed.</i>	<i>(Wholly & temporarily, below & above ground)</i>	



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