

## APPENDIX 1

(referred to in paragraphs 13 and 18)

### **Production of diazo copying materials**

1. The techniques employed in the production of diazo sensitised copying materials comprise:

- (a) unwinding a reel of the base material;
- (b) applying the appropriate chemical solutions in a coating machine;
- (c) removing any excess solution while the material is passing through the machine;
- (d) drying the coated materials in ovens which form part of the machine;
- (e) re-reeling the dry coated material;
- (f) converting the coated reel into rolls or sheets.

#### **Aqueous process**

2. An aqueous coating is used for opaque papers where a water based diazo solution is allowed to soak into the material. The coating operation consists of the application of a precoat to one side of the sheet, followed by the application of the diazo solution to the same side of the sheet. This is followed by a final application of a back coat to reduce 'curling' of the material. A drying stage, employing hot air, occurs between each application. In drying it is most important to obtain the correct rate of evaporation of the water from the paper surface. This must be graduated so as to leave the sensitising chemicals in the best possible arrangement in the surface layer.

#### **Solvent process**

3. A petroleum based solvent diazo solution is used for impervious materials such as polyester films and also for lacquered papers and cloths. In the solvent process the diazo coating adheres to the surface of the material and does not sink into the surface as in the aqueous process. In sensitising film a layer of resinous lacquer is coated on to it and the film must first be etched with acid to allow the lacquer to 'key' on to the film. Once this layer has adhered to the film the solution of sensitising chemicals is applied. This solution penetrates the resinous layer in a similar manner to the absorption of the diazo solution by paper in the aqueous process. Film materials are frequently coated on both sides, and film products may therefore have to be passed through the coating machine more times than the paper products.

#### **Converting and packing**

4. The conversion or cutting of the finished reels into rolls or sheets is a separate operation and it is necessary for it to be carried out in premises where the temperature is controlled and which are shielded from ultra-violet light. In order to prevent deterioration during storage light-proof packaging and cool dry storage conditions are essential.

### **Economies of scale**

5. The capacity of the coating process is the key factor in the determination of the capacity of a diazo materials plant. Coating machines are of limited capacity though they vary in their speed, the width of material that can be coated and the degree of automatic control. The minimum efficient size of a coating plant is considered to be two machines (in order to provide against machine down-time, breakdowns, etc). Larger scale plants comprise a larger number of similar coating machines. Since each machine requires a fixed crew and there is virtually no auxiliary equipment which can be shared by additional machines, production economies in coating are limited to minor savings in such areas as supervisory labour (though these account for a small proportion of total production costs) and in stocks of spares and consumable materials. Because of the considerable costs of changing over from one coating to another there are potential economies of long production runs but in practice these are limited by the short shelf life of diazo materials.

6. There are some potential economies in larger plants in raw materials preparation, for example in piping materials to the coating machines which can reduce waste and save labour but the wide product variety demanded by users limits the scope for exploitation of these economies. The wide product variety also limits the extent of scale economies in conversion which is a largely labour intensive process. A large number of different converting machines of limited capacity has to be employed even by the larger manufacturers. More generally the potential economies of scale in production are limited by the preponderance of raw material cost in total production costs.

7. Distribution and selling costs also represent a significant proportion of total costs and offer some scope for economies to larger suppliers although the wide product range again is a limiting factor. Each of the larger suppliers has established a comprehensive national distribution system and uses a fleet of large road vehicles. Finally there are economies of scale in such activities as specialist management services and R & D which are only feasible for companies above a certain minimum size.

## APPENDIX 2

*(referred to in paragraphs 16, 29 and 32)*

### **Other United Kingdom suppliers of diazo materials (not described in Chapter 4)**

#### **Entwistle Thorpe Limited**

1. The company supplies all kinds of drawing office equipment and started to supply diazo materials in 1947. It sells diazo papers and cloths under its own trade names of 'Skorazo' and 'Skorax'. These materials are manufactured by an associate company, Coaters Limited, at its factory in Manchester. Entwistle Thorpe also sell small quantities of Ozalid's and Winterbottom Products' materials under those companies' trade names. Most of the company's sales are to retail customers through its seven retail branches.

#### **A West and Partners Limited**

2. The company was founded in 1888 and is a supplier of drawing office equipment and diazo materials and machines. A West has manufactured semi-dry diazo materials since 1928, first at Westminster and since 1961 at Croydon, and in 1974 began the manufacture of dry diazo materials. Diazo polyester films and machines are bought in. The company supplies its diazo materials under its trade name 'Uno Jetline'. A West has five retail branches which trade under the name of Sargents Embrook and which, in addition to selling A West's products, also retail some other manufacturers' diazo materials. The branches also provide copying services. Most of A West's sales are to its own retail branches and to trade houses.

#### **Winterbottom Products Limited**

3. The company started supplying diazo polyester film in October 1974 and sells it under its trade name. Most of the company's sales are to trade houses.

#### **Sensitisers (Western) Limited**

4. The company was set up in January 1973 and manufacture diazo sensitised polyester film and tracing paper at its factory in Cornwall; production commenced in March 1974. The company sells standard diazo films to wholesalers and supplies other diazo manufacturers with special products which they do not make themselves. The materials are supplied in reel form and must be converted by Sensitisers' customers. The greater part of the company's sales are for export.

#### **Malmesbury Diazo Coaters Limited**

5. The company was set up in March 1974 (see paragraph 32) and is a wholesaler who obtains supplies of diazo papers in mill reel form from other United Kingdom suppliers and converts them into sheets and rolls at its premises at Malmesbury. The company also sells some imported diazo sensitised polyester film. Malmesbury Diazo Coaters supplies trade houses only.

## **Suppliers of diazo and vesicular microfilm**

### **Bexford Limited**

6. Bexford became a wholly-owned subsidiary of ICI in 1968 and remained so until 1974 when 25 per cent of the shares were acquired by Ozalid (see paragraph 54). The company's works are at Brantham, Manningtree, Essex, and at 30 June 1976 it had some 625 employees. Bexford manufactures film products, including non-sensitised polyester films for reprographic purposes, and in 1971 started to supply diazo microfilm of its own manufacture although sales of microfilm account for only a very small proportion of its total turnover. Bexford also supplies some vesicular microfilm imported from the United States.

### **Other suppliers of microfilm**

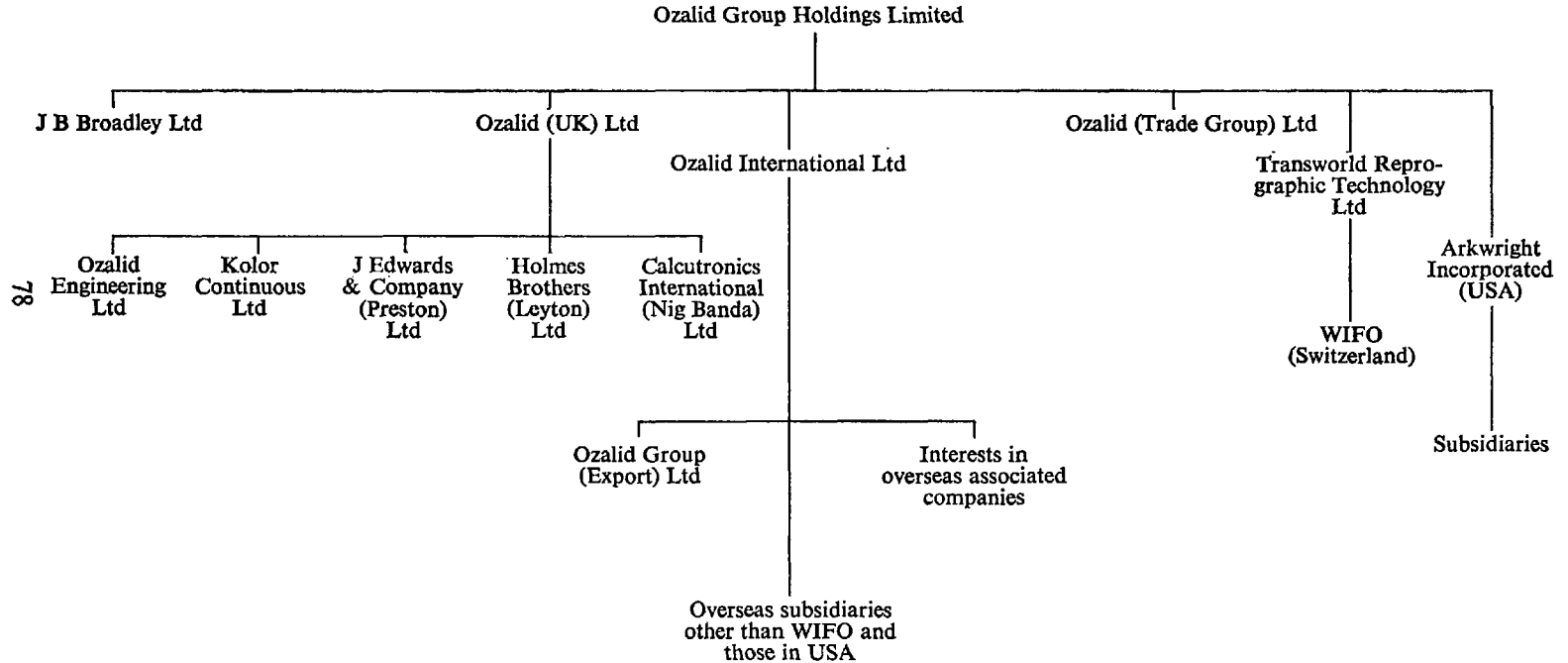
7. The following companies are known to import diazo or vesicular microfilm:

Addressograph-Multigraph Limited  
Bell & Howell Limited  
Datagraphix Limited  
GAF (Great Britain) Limited  
Hoechst UK Limited  
Kodak Limited  
Pacer Graphics Limited  
Wicks and Wilson Limited

APPENDIX 3

(referred to in paragraphs 56 and 59)

**The organisation of Ozalid Group Holdings Limited**



Notes: Ozalid (UK) Ltd and Ozalid (Trade Group) Ltd are concerned with diazo materials. Export of diazo materials are made through Ozalid International Ltd. Diazo machines are made by Ozalid Engineering Ltd. Overseas companies manufacture diazo materials in France, Italy, Sweden, South Africa, USA, Canada, Australia, Finland and Brazil.

APPENDIX 4  
(referred to in paragraph 155)

**Dates of price and discount changes 1968 to 1976**

		<i>Ozolid</i> <sup>1</sup>	<i>GAF</i>	<i>Addressograph-Multigraph</i> <sup>2</sup>	<i>Harper &amp; Tunstall</i>
1968	Prices	19/8/68	N/A	19/8/68	N/A
	Discounts	19/8/68	August 1968	19/8/68	N/A
1969	Prices	11/12/68 1/3/69	May 1969	12/5/69	Feb/June 1969
	Discounts	1/5/69	May 1969	12/5/69	Feb/June 1969
1970	Prices	1/1/70	1/1/70	1/1/70	Jan 1970
	Discounts	1/1/70	Jan 1970	1/1/70	Jan 1970
	Prices	No change	No change	N/A	No change
	Discounts	17/8/70	1/9/70	N/A	Sept 1970
1971	Prices	1/2/71	8/2/71	Feb 1971	March 1971
	Discounts	No change	No change	Feb 1971 <sup>3</sup>	No change
1972	Prices	No change	No change	No change	No change
	Discounts	1/1/72	Jan 1972	17/1/72	7/2/72
1973	Prices	29/10/73	1/11/73	26/10/73	26/11/73
	Discounts	29/10/73	1/11/73	26/10/73	26/11/73
	Prices	No change	17/12/73	No change	No change
	Discounts	No change	17/12/73	No change	No change
1974	Prices	14/1/74	No change	4/2/74	1/2/74
	Discounts	14/1/74	No change	4/2/74	1/2/74
	Prices	4/3/74	March/April 1974	25/2/74 20/3/74	18/3/74
	Discounts	11/3/74	15/3/74	20/3/74	18/3/74
	Prices	29/4/74	May 1974	22/4/74	29/4/74
	Discounts	No change	No change	No change	No change
	Prices	22/7/74	5/8/74	2/9/74	12/8/74
	Discounts	22/7/74 27/8/74	5/8/74	2/9/74	12/8/74
	Prices	No change	23/12/74	16/12/74	No change
	Discounts	No change	No change	No change	No change

<sup>1</sup> See footnote to paragraph 52.

<sup>2</sup> Admet before 1972 (see paragraph 106).

<sup>3</sup> Revised discounts were in operation at this date but it is not necessarily the actual date on which discounts were changed.

APPENDIX 4—*contd.*

		<i>Ozald</i> <sup>1</sup>	<i>GAF</i>	<i>Addressograph-Multigraph</i> <sup>2</sup>	<i>Harper &amp; Turnstall</i>
1975	Prices	Feb 1975	31/3/75	31/3/75	20/1/75
	Discounts	No change	No change	No change	No change
	Prices	No change	No change	No change	April 1975
	Discounts	No change	No change	No change	No change
	Prices	No change	1/10/75	No change	No change
	Discounts	No change	No change	No change	No change
1976	Prices	Jan 1976	No change	July 1976	March 1976
	Discounts	Jan 1976	No change	No change	March 1976
	Prices	Oct 1976	Sept 1976	Oct 1976	Oct 1976
	Discounts	Oct 1976	No change	No change	No change

<sup>1</sup> See footnote to paragraph 52.

<sup>2</sup> Admel before 1972 (see paragraph 106).

APPENDIX 5  
(referred to in paragraph 155)

**Discount changes 1968 to 1976**

**Explanatory notes**

1. The standard papers referred to in this Appendix are medium, medium tinted and lightweight (or thin) papers. The specialities comprise all other diazo materials, including polyester film. (Before 1970 stout paper was included in the standard papers category; since then it has come under specialities.) Each manufacturer has one discount structure for the standard papers and another for the specialities. Ozalid and AM denote the discount structures applicable to standard papers and specialities respectively by reference to the product item numbers on their price lists. GAF describes the appropriate discount structure by reference to group A and group B products. H & T's two discount structures are shown as relating to standard papers and speciality products.

2. Between August 1968 and March 1974 the qualifying values in the manufacturers' discount scales were the same and are not repeated.

Consumer discount changes

	<i>Qualifying values</i>	<i>Ozalid</i> <sup>1</sup>	<i>GAF</i>	<i>AM</i> <sup>2</sup>	<i>H &amp; T</i>
	£	<i>discount</i> %	<i>discount</i> %	<i>discount</i> %	<i>discount</i> %
Standard papers	9+	(19/8/68) 7½	(Aug 1968) 7½	(19/8/68) 7½	(Feb 1969) 7½
	17+	15	15	15	15
	25+	30	30	30	30
	75+	40	40	40	40
Specialities	15+	5	5	5	5
	30+	10	10	10	10
	45+	15	15	15	15
	60+	20	20	20	20
100+	25	25	25	25	
Standard papers	25+	(1/5/69) 10	(May 1969) 10	(12/5/69) 10	(June 1969) 10
	50+	25	25	25	25
	100+	40	40	40	40
	150+	50	50	50	50
Specialities	25+	5	5	5	5
	50+	12½	12½	12½	12½
	100+	20	20	20	20
	150+	25	25	25	25
Standard papers	25+	(1/1/70) 5	(Jan 1970) 5	(1/1/70) 5	(Jan 1970) 5
	50+	10	10	10	10
	100+	20	20	20	20
	200+	40	40	40	40
Specialities	50+	5	5	5	5
	100+	10	10	10	10
	200+	20	20	20	20
Standard papers	50+	(17/8/70) 5	(1/9/70) 5		(Sept 1970) 5
	100+	15	15		15
	200+	30	30		30
	400+	40	40		40
	600+	50	50		50
Specialities	50+	2½	2½	not available	2½
	100+	5	5		5
	200+	10	10		10
	400+	20	20		20
	600+	30	30		30
Standard papers	50+			(Feb 1971) 5	
	100+			15	
	200+			30	
	400+			40	
	600+			50	
Specialities	50+	no change	no change		no change
	100+			2½	
	200+			5	
	400+			10	
	600+			20	
				30	

<sup>1</sup> See footnote to paragraph 52.

<sup>2</sup> Admel before 1972 (see paragraph 106).

**Trader discount changes**

<i>Qualifying values</i>	<i>Ozalid<sup>1</sup></i>	<i>GAF</i>	<i>AM<sup>a</sup></i>	<i>H &amp; T</i>
<i>£</i>	<i>discount</i>	<i>discount</i>	<i>discount</i>	<i>discount</i>
	<i>%</i>	<i>%</i>	<i>%</i>	<i>%</i>
	(19/8/68)			
Below 25	25			
25+	40			
100+	50			
		not available	not available	not available
Below 45	20			
45+	27½			
100+	33½			
	(1/5/69)			
Below 100	30			
100+	40			
200+	50			
		not available	not available	not available
Below 100	20			
100+	25			
200+	30			
				(Jan 1970)
Below 100				30
100+				40
200+				50
	no change	not available	not available	
Below 100				20
100+				25
200+				30
	(17/8/70)			(Sept 1970)
Below 100	20			20
100+	25			25
175+	35			35
250+	45			45
600+	50			50
		not available	not available	
Below 100	15			15
100+	20			20
175+	25			25
600+	30			30
			(Feb 1971)	
Below 100			20	
100+			25	
175+			35	
250+			45	
600+			50	
	no change	not available		no change
Below 100			15	
100+			20	
175+			25	
600+			30	

Consumer discount changes

	<i>Qualifying values</i>	<i>Ozalid</i>	<i>GAF</i>	<i>AM</i>	<i>H &amp; T</i>
		<i>discount</i>	<i>discount</i>	<i>discount</i>	<i>discount</i>
	£	% (1/1/72)	% (Jan 1972)	% (17/1/72)	% (7/2/72)
Standard papers	100+	10	10	10	10
	300+	25	25	25	25
	600+	47½	47½	47½	47½
Specialities	100+	2½	2½	2½	2½
	300+	12½	12½	12½	12½
	600+	25	25	25	25
		(29/10/73)	(1/11/73)	(26/10/73)	(26/11/73)
Standard papers	110+	10	10	10	10
	330+	25	25	25	25
	660+	47½	47½	47½	47½
Specialities	110+	2½	2½	2½	2½
	330+	12½	12½	12½	12½
	660+	25	25	25	25
		(14/1/74)	(17/12/73)	(4/2/74)	(1/2/74)
Standard papers	110+	2½	2½	2½	2½
	330+	17½	17½	17½	17½
	660+	42	42	42	42
Specialities	110+	2½	2½	2½	2½
	330+	12½	12½	12½	12½
	660+	25	25	25	25

	<i>Ozalid</i>		<i>GAF</i>		<i>AM</i>		<i>H &amp; T</i>	
	<i>Qualifying values</i>	<i>discount</i>	<i>Qualifying values</i>	<i>discount</i>	<i>Qualifying values</i>	<i>discount</i>	<i>Qualifying values</i>	<i>discount</i>
	£	% (11/3/74)	£	% (15/3/74)	£	% (20/3/74)	£	% (18/3/74)
Standard papers	175+	2½	175+	2½	175+	2½	175+	2½
	350+	15	350+	15	350+	15	350+	15
	700+	37½	700+	37½	700+	37½	700+	37½
Specialities	175+	2½	110+	2½	175+	2½	175+	2½
	350+	12½	330+	12½	350+	12½	350+	12½
	700+	25	660+	25	700+	25	700+	25
			(6/5/74)					
Standard papers			175+	2½				
			350+	15				
			700+	37½				
		no change			no change		no change	
Specialities			175+	2½				
			350+	12½				
			700+	25				
		(22/7/74)	(5/8/74)	(2/9/74)	(12/8/74)			
Standard papers	200+	2½	200+	2½	200+	2½	250+	5
	400+	10	400+	10	400+	10	450+	15
	700+	25	700+	25	700+	25	650+	25
	1,000+	35	1,000+	35	1,000+	35	900+	35
Specialities	200+	2½	200+	2½	200+	2½	250+	5
	400+	10	375+	12½	400+	10	450+	15
	700+	25	750+	25	700+	25	650+	25

**Trader discount changes**

<i>Qualifying values</i>	<i>Ozalid</i>	<i>GAF</i>	<i>AM</i>	<i>H &amp; T</i>
	<i>discount</i>	<i>discount</i>	<i>discount</i>	<i>discount</i>
	£	£	£	£
	(1/1/72)	(Jan/Feb 1972)	(17/1/72)	(7/2/72)
Below 100	10	10	10	10
100+	25	25	25	25
300+	47½	47½	47½	47½
Below 100	5	5	5	5
100+	12½	12½	12½	12½
300+	25	25	25	25
	(29/10/73)	(1/11/73)	(26/10/73)	(26/11/73)
Below 110	10	10	10	10
110+	25	25	25	25
330+	47½	47½	47½	47½
Below 110	5	5	5	5
110+	12½	12½	12½	12½
330+	25	25	25	25
	(14/1/74)	(17/12/73)	(4/2/74)	(1/2/74)
Below 110	2½	2½	2½	2½
110+	17½	17½	17½	17½
330+	42	42	42	42
Below 110	2½	5	2½	2½
110+	12½	12½	12½	12½
330+	25	25	25	25

<i>Ozalid</i>		<i>GAF</i>		<i>AM</i>		<i>H &amp; T</i>	
<i>Qualifying values</i>	<i>discount</i>	<i>Qualifying values</i>	<i>discount</i>	<i>Qualifying values</i>	<i>discount</i>	<i>Qualifying values</i>	<i>discount</i>
£	%	£	%	£	%	£	%
	(11/3/74)		(15/3/74)		(20/3/74)		(18/3/74)
Below 175	2½	Below 175	2½	Below 175	2½	Below 120	2½
175+	15	175+	15	175+	15	120+	17½
350+	37½	350+	37½	350+	37½	350+	37½
Below 175	2½	Below 110	2½	Below 175	2½	Below 120	2½
175+	12½	110+	12½	175+	12½	120+	12½
350+	25	330+	25	350+	25	350+	25

no change

no change

no change

no change

	(22/7/74)		(5/8/74)		(2/9/74)		(12/8/74)
Below 200	2½	Below 200	2½	Below 200	2½		
200+	10	200+	10	200+	10	100+	25
400+	25	400+	25	400+	25	450+	35
500+	35	500+	35	500+	35		
Below 200	2½	Below 200	2½	Below 200	2½		
200+	10	200+	12½	200+	10	50+	20
400+	25	350+	25	400+	25	350+	25

**Consumer discount changes**

	<i>Ozalid</i>		<i>GAF</i>		<i>AM</i>		<i>H &amp; T</i>	
	<i>Qualifying discount values</i>		<i>Qualifying discount values</i>		<i>Qualifying discount values</i>		<i>Qualifying discount values</i>	
	£	%	£	%	£	%	£	%
		(27/8/74)						
Standard papers	200+	2½						
	400+	10						
	700+	25						
	1,000+	35						
			no change	no change			no change	
Specialities	200+	2½						
	375+	12½						
	750+	25						
		(Jan 1976)					(Mar 1976)	
Standard papers	200+	5					200+	5
	350+	10					400+	15
	500+	15					600+	25
	650+	25					900+	35
	800+	35						
			no change	no change				
Specialities	200+	5					200+	5
	350+	10					400+	15
	500+	15					600+	25
	650+	25						
		(Oct 1976)						
Standard papers	215+	5						
	375+	10						
	540+	15						
	700+	25						
	865+	35						
			no change	no change			no change	
Specialities	220+	5						
	385+	10						
	550+	15						
	715+	25						



APPENDIX 6  
(referred to in paragraph 155)

**Prices of three diazo papers and two diazo polyester films—1968 to 1976 (one size of roll)**

<i>Product</i>	<i>Date</i> <sup>1</sup>	<i>Ozald</i> <sup>2</sup> £	<i>GAF</i> £	<i>AM</i> <sup>3</sup> £	<i>H &amp; T</i> £
<b>Paper 30" × 20 yds</b>	Aug 1968	0.95	0.95 ammonia	0.95	N/A
Medium					
Medium tinted					
Thin	0.95	0.95 ammonia	0.95	N/A	
∞ <b>Film 30" × 10 yds</b>		4.725 Ozalar 'S' <sup>4</sup>	4.725	4.725	N/A
·003		4.87 Ozaloft & Ozafilm	5.90	5.90	N/A
<b>Paper 30" × 20 yds</b>	Jan/Feb 1969	0.95	0.95	N/A	0.95 ammonia
Medium					
Medium tinted					
Thin	0.95	0.95	N/A	0.875 semi-dry	
<b>Film 30" × 10 yds</b>		4.725 Ozalar 'S'	4.725	N/A	1.40
·003		4.87 Ozaloft & Ozafilm	5.90	N/A	0.95 ammonia
<b>Paper 30" × 20 yds</b>	May/June 1969	0.95	0.95	0.95	0.95
Medium					
Medium tinted					
Thin	0.95	0.95	0.95	0.95	0.875 semi-dry

<b>Film 30" × 10 yds</b>					
-002		{ 5-20 Ozalar 'S'	5-20	5-20	{ 5-12 ammonia
		5-30 Ozaloft & Ozafilm			5-35 semi-dry
-003		6-34	6-34	6-35	6-34
<b>Paper 30" × 25m</b>	Jan 1970				
Medium		1-50	1-50	1-50	1-50
Medium tinted		2-32	2-32	2-32	2-32
Thin		1-50	1-50	1-50	1-50
<b>Film 30" × 20m</b>					
-002		{ 11-40 Ozalar 'S'	11-40	11-40	{ 11-25 ammonia
		11-72 Ozaloft & Ozafilm			11-75 semi-dry
-003		13-90	13-90	13-90	13-90
<b>Paper 30" × 25m</b>	Aug/Sept 1970				
Medium		1-50	1-50	N/A	1-50
Medium tinted		2-32	2-32	N/A	2-32
Thin		1-50	1-50	N/A	1-50
<b>Film 30" × 20m</b>					
-002		{ 11-40 Ozalar 'S'	11-40	N/A	{ 11-25 ammonia
		11-72 Ozaloft & Ozafilm			11-75 semi-dry
-003		13-90	13-90	N/A	13-90
<b>Paper 30" × 25m</b>	Feb/March 1971				
Medium		1-60	1-60	1-60	1-60
Medium tinted		2-45	2-45	2-45	2-45
Thin		1-60	1-60	1-60	1-60
<b>Film 30" × 20m</b>					
-002		{ 12-00 Ozalar 'S'	12-00	12-00	{ 11-80 ammonia
		12-35 Ozaloft & Ozafilm			12-35 semi-dry
-003		14-60	14-60	14-60	14-60
<b>Paper 30" × 25m</b>	Jan 1972				
Medium		1-60	1-60	N/A	N/A
Medium tinted		2-45	2-45	N/A	N/A
Thin		1-60	1-60	N/A	N/A

<sup>1</sup> These dates relate to the dates of price lists for Ozalid, Addressograph-Multigraph and Harper and Tunstall but not necessarily for GAF.

<sup>2</sup> See footnote to paragraph 52.

<sup>3</sup> Admel before 1972 (see paragraph 106)

<sup>4</sup> Ozalid supplies more types of polyester film than the other manufacturers and the various manufacturers' films are not always strictly comparable.

<i>Product</i>	<i>Date</i>	<i>Ozalid</i> £	<i>GAF</i> £	<i>AM</i> £	<i>H &amp; T</i> £
Film 30" × 20m -002	Jan 1972	{ 12:00 Ozalar 'S' 12:35 Ozaloft & Ozafilm 14:60	12:00	N/A	N/A
			14:60	N/A	N/A
Paper 30" × 25m Medium Medium tinted Thin	Oct/Nov 1973	1:75	1:75	N/A	1:76
		2:70	2:70	N/A	2:70
		1:95	1:90	N/A	1:76
Film 30" × 20m -002		{ 12:60 Ozalar 'S' 12:95 Ozaloft & Ozafilm 15:35	12:60	N/A	{ 12:30 ammonia 12:85 semi-dry 15:20
			15:35	N/A	
Paper 30" × 25m Medium Medium tinted Thin	Jan/Feb 1974	1:75	1:75	N/A	1:76
		2:70	2:70	N/A	2:70
		1:95	1:90	N/A	1:91
Film 30" × 20m -002		{ 12:60 Ozalar 'S' 12:95 Ozaloft & Ozafilm 15:35	12:60	N/A	12:30
			15:35	N/A	15:20
Paper 30" × 25m Medium Medium tinted Thin	March 1974	1:75	1:80	N/A	1:76
		2:70	2:75	N/A	2:70
		1:95	2:00	N/A	1:91
Film 30" × 25m -002		{ 14:20 Ozalar 'S' 14:55 Ozaloft & Ozafilm 17:25	14:20	N/A	13:85
			17:25	N/A	17:10
Paper 30" × 25m Medium Medium tinted Thin	April/May 1974	1:90	1:90	1:85	1:84
		2:88	2:90	2:85	2:85
		2:10	2:10	2:05	2:00

Film 30' × 20m -002		{ 15-60 Ozalar 'S' 16-00 Ozaloft & Ozafilm 19-00	15-60	15-60	15-25
-003			19-00	19-00	18-75
Paper 841mm × 25m Medium	July/Sept 1974	2-47	2-45	2-45	2-45
Medium tinted		3-62	3-60	3-55	3-56
Thin		2-70	2-70	2-65	2-65
Film 841mm × 20m -002		{ 17-20 Ozalar 'S' 17-70 Ozaloft & Ozafilm 20-95	17-20	17-20	16-85
-003			20-95	20-95	20-65
Paper 841mm × 25m Medium	Dec 1974	2-47	2-55	2-55	2-45
Medium tinted		3-62	3-80	3-75	3-56
Thin		2-70	2-85	2-80	2-65
Film 841mm × 20m -002		{ 17-20 Ozalar 'S' 17-70 Ozaloft & Ozafilm 20-95	18-05	18-05	16-85
-003			22-00	22-00	20-65
Paper 841mm × 25m Medium	Jan/March 1975	2-72	2-72	2-65	2-55
Medium tinted		3-97	3-95	3-90	3-75
Thin		2-97	2-95	2-90	2-80
Film 841mm × 20m -002		{ 18-90 Ozalar 'S' 19-45 Ozaloft & Ozafilm 23-05	18-90	18-90	17-70
-003			23-05	23-05	21-65
Paper 841mm × 25m Medium	1 Oct 1975	2-72	2-89	2-65	2-55
Medium Tinted		3-97	4-20	3-90	3-75
Thin		2-97	3-15	2-90	2-80
Film 841mm × 20m -002		{ 18-90 Ozalar 'S' 19-45 Ozaloft & Ozafilm 23-05	20-05	18-90	17-70
-003			24-45	23-05	21-65

<i>Product</i>	<i>Date</i>	<i>Ozalid</i> £	<i>GAF</i> £	<i>AM</i> £	<i>H &amp; T</i> £
<b>Paper 841mm × 25m</b>	Jan/March 1976				
Medium		2·89	2·89	2·65	2·85
Medium tinted		4·20	4·20	3·90	4·19
Thin		3·15	3·15	2·90	3·07
<b>Film 841mm × 20m</b>					
·002		{ 20·05 Ozalar 'S'	20·05	18·90	19·57
		{ 20·60 Ozaloft & Ozafilm			
·003		24·45	24·45	23·05	23·84
<b>Paper 841mm × 25m</b>	1 July 1976				
Medium		2·89	2·89	2·85	2·85
Medium tinted		4·20	4·20	4·15	4·19
Thin		3·15	3·15	3·10	3·07
<b>Film 841mm × 20m</b>					
·002		{ 20·05 Ozalar 'S'	20·05	19·85	19·57
		{ 20·60 Ozaloft & Ozafilm			
·003		24·45	24·45	24·20	23·84
<b>Paper 841mm × 25m</b>	Sept/Oct 1976				
Medium		3·10	3·06	3·00	3·08
Medium tinted		4·52	4·45	4·40	4·53
Thin		3·40	3·34	3·25	3·32
<b>Film 841mm × 20m</b>					
·002		{ 22·05 Ozalar 'S'	21·25	21·20	22·30
		{ 22·65 Ozaloft & Ozafilm			
·003		26·90	25·92	25·85	26·50

APPENDIX 7  
(referred to in paragraph 156)

**Some list prices on 22 November 1976**

	Sheets				Rolls	
	(Number of sheets in brackets)					
	Size	A5 (500)	A0 (125)	10in × 15in (500)	40in × 60in (125)	40in × 25m 841mm × 25m
Products and Manufacturers	£	£	£	£	£	£
<b>(1) Medium paper</b>						
Ozalid	2·85 <sup>1</sup>	18·45	7·55 <sup>1</sup>	28·35	3·62	3·10
GAF	2·84	18·30	7·54	28·35	3·55	3·06
Addressograph- Multigraph	2·80	18·30	7·45	28·10	3·50	3·00
Harper and Tunstall	2·79	18·35	7·46	28·25	3·59	3·08
<b>(2) Medium tinted paper</b>						
Ozalid	4·05 <sup>1</sup>	27·70	11·28 <sup>1</sup>	42·65	5·50	4·52
GAF	4·01	27·45	11·29	42·66	5·41	4·45
Addressograph- Multigraph	3·95	27·40	11·20	42·25	5·35	4·40
Harper and Tunstall	4·18	27·65	11·22	42·93	5·50	4·53
<b>(3) Thin paper</b>						
Ozalid	3·13 <sup>1</sup>	20·30	8·25 <sup>1</sup>	31·05	3·97	3·40
GAF	3·10	20·12	8·26	31·05	3·90	3·34
Addressograph- Multigraph	3·10	20·10	8·15	30·85	3·80	3·25
Harper and Tunstall	3·09	20·33	8·24	31·03	3·97	3·32
	A5 (250)	A0 (125)	10in × 15in (250)	40in × 60in (125)	40in × 20m	841mm × 20m
	£	£	£	£	£	£
<b>(4) ·003 Polyester film</b>						
Ozalid	13·20	206·70	40·10	318·30	32·50	26·90
GAF	12·84	201·05	39·37	312·50	31·32	25·92
Addressograph- Multigraph	12·75	200·95	39·05	310·75	31·30	25·85
Harper and Tunstall	12·96	204·85	39·27	329·20	32·10	26·50
<b>(5) ·002 Polyester film</b>						
Ozalid						
Ozaloft and Ozafilm <sup>2</sup>	11·10	173·30	33·90	268·30	27·40	22·65
Ozalar <sup>2</sup> 'S'	10·85	170·00	33·05	261·65	26·70	22·05
GAF	10·54	165·37	32·45	256·88	25·71	21·25
Addressograph- Multigraph	10·50	165·30	32·15	255·90	25·70	21·20
Harper and Tunstall	11·06	168·49	33·24	262·02	26·87	22·30

<sup>1</sup> Prices are given per 1,000 sheets. These are the equivalent prices per 500 sheets.

<sup>2</sup> Ozalid supplies more types of polyester film than the other manufacturers and the various manufacturers' lists are not always strictly comparable.

APPENDIX 8  
(referred to in paragraphs 156 and 158)

**Discounts and conditions of sale on 22 November 1976**

<i>Consumer</i>	Standard papers							
	<i>Ozalid</i>		<i>GAF</i>		<i>AM</i>		<i>H &amp; T</i>	
	<i>Qualifying values</i>	<i>discount</i>	<i>Qualifying values</i>	<i>discount</i>	<i>Qualifying values</i>	<i>discount</i>	<i>Qualifying values</i>	<i>discount</i>
	£	%	£	%	£	%	£	%
	215+	5	200+	2½	200+	2½	200+	5
	375+	10	400+	10	400+	10	400+	15
	540+	15	700+	25	700+	25	600+	25
	700+	25	1,000+	35	1,000+	35	900+	35
	865+	35						
	<b>Specialities</b>							
	220+	5	200+	2½	200+	2½	200+	5
	385+	10	375+	12½	400+	10	400+	15
	550+	15	750+	25	700+	25	600+	25
	715+	25						

94

<i>Trader</i>	Standard papers							
	<i>Ozalid</i>		<i>GAF</i>		<i>AM</i>		<i>H &amp; T</i>	
	<i>Qualifying values</i>	<i>discount</i>	<i>Qualifying values</i>	<i>discount</i>	<i>Qualifying values</i>	<i>discount</i>	<i>Qualifying values</i>	<i>discount</i>
	£	%	£	%	£	%	£	%
	Below 190	5	Below 200	2½	Below 200	2½	100+	25
	190+	10	200+	10	200+	10	450+	35
	270+	15	400+	25	400+	25		
	350+	25	500+	35	500+	35		
	430+	35						
	<b>Specialities</b>							
	Below 190	5	Below 200	2½	Below 200	2½	50+	20
	190+	10	200+	12½	200+	10	350+	25
	275+	15	350+	25	400+	25		
	355+	25						

## Conditions of sale

### Ozalid

Quantity discounts apply to orders for delivery at one time to one address.

To qualify for quantity discount it is necessary to order to the value stated for that group of materials. The total value of mixed groups does not qualify.

Whilst every effort will be made to give advance warning of price changes, prices and discounts are subject to alteration without prior notification and material will be invoiced at prices ruling at the date of despatch.

Minimum order value £5. Orders valued between £5 and £10 will be surcharged £2 towards the cost of handling and delivery.

Multiples of roll lengths can be supplied at pro-rata prices. Cored rolls for automatic machines are available at no extra charge. Thirty inch roll material is available at the 841 mm price.

Any sheet size outside the standard list will be charged to the next size up which fulfills both dimensions of the non-standard size ordered.

Monthly settlement terms—net.

VAT is chargeable at the current price.

### GAF

Mixed orders for groups A and B do not qualify for an overall discount.

Terms net. Minimum order value £5. A handling charge of £2 will be applicable on all orders between £5 and £10.

No discounts on developers.

The discounts apply to:

- orders placed at one time;
- for delivery at one time;
- for delivery to one address.

Prices, discounts and conditions are subject to alteration without notice.

### Addressograph-Multigraph

Orders for standard materials and specialities do not qualify for an overall discount. They will, if applicable, qualify for individual discounts. Discounts are based on quantity ordered at one time for delivery to one address.

Customers requiring non-standard size sheets will be charged at the next larger size which includes both dimensions.

Narrow width rolls may be supplied.

Special core and longer length rolls are priced pro-rata to the standard length of roll.

All products and services will be invoiced at prices ruling on the date of despatch.

All prices are subject to VAT at the current rate.

**Harper and Tunstall**

Sheet orders: Orders should be placed for a number of packs not sheets.

Quantity discounts: These apply to single orders for delivery to one address at one time.

Carriage: Is paid on all orders value £10 and over.

Small orders: A charge of £1 will be made on any order under £10 invoice value, unless paid for in cash and collected from one of our branches.

Settlement terms: Our terms are net monthly.

Price change: Whilst every effort will be made to give advance warning of price increases, prices and discounts are subject to alteration without prior notification and materials will be invoiced at prices ruling at the date of despatch.

VAT: Prices shown do not include VAT which will be levied at the rate ruling at the tax point.

APPENDIX 9  
(referred to in paragraph 164)

**Ozalid Group Holdings Limited—sales, profits and capital employed<sup>1</sup> 1966, 1969 and 1972 to 1975**

	Diaz business (home and export)					£'000
	1966	1969	1972	1973	1974	1975
<b>Diazo copying materials (home) (reference)</b>						
Sales	3,527	4,010	8,901	9,055	10,823	11,407
Net profit	833	753	2,522	1,790	2,196	1,978
Capital employed	3,030	2,912	5,871	6,153	6,751	6,673
Percentage of sales	23·6	18·8	28·3	19·8	20·3	17·3
Percentage of capital	27·5	25·9	43·0	29·1	32·5	29·6
<b>Diazo copying materials (export)</b>						
Sales	714	1,309	2,265	2,478	2,621	2,351
Net profit	116	247	436	280	639	571
Capital employed	557	582	1,316	1,375	1,651	1,715
Percentage of sales	16·2	18·9	19·2	11·3	24·4	24·3
Percentage of capital	20·8	42·4	33·1	20·4	38·7	33·3
<b>Diazo machines (home)</b>						
Sales	436	762	1,509	1,718	1,812	1,736
Net profit/(loss)	(78)	(19)	(146)	(140)	(228)	(554)
Capital employed	375	709	1,173	1,213	1,677	2,240
Percentage of sales	(17·9)	(2·5)	(9·7)	(8·1)	(12·6)	(31·9)
Percentage of capital	(20·8)	(2·7)	(12·4)	(11·5)	(13·6)	(24·7)
<b>Diazo machines (export)</b>						
Sales	97	236	201	238	311	392
Net profit/(loss)	(16)	(6)	4	(1)	29	18
Capital employed	102	49	98	136	255	336
Percentage of sales	(16·5)	(2·5)	2·0	(0·4)	9·3	4·6
Percentage of capital	(15·7)	(12·2)	4·1	(0·7)	11·4	5·3

<sup>1</sup> Capital employed is represented by net tangible assets, ie tangible fixed assets at original cost less accumulated depreciation plus current assets, less creditors and current taxation. Goodwill and other intangibles are not included. The group capital employed is based on the average of the yearly opening and closing figures but the capital employed for diazo copying materials and diazo printing machines has been calculated on year-end figures as opening and closing figures were not available for each of the years.

	<b>Diazo business (home and export)</b>					<b>£'000</b>
	<b>1966</b>	<b>1969</b>	<b>1972</b>	<b>1973</b>	<b>1974</b>	<b>1975</b>
<b>Diazo copying materials and machines combined (home)</b>						
Sales	3,963	4,772	10,410	10,773	12,635	13,143
Net profit	755	734	2,376	1,650	1,968	1,424
Capital employed	3,405	3,621	7,044	7,366	8,428	8,913
Percentage of sales	19.1	15.4	22.8	15.3	15.6	10.8
Percentage of capital	22.2	20.3	33.7	22.4	23.4	16.0

<b>Diazo copying materials and machines combined (export)</b>						
Sales	811	1,545	2,466	2,716	2,932	2,743
Net profit	100	241	440	279	668	589
Capital employed	659	631	1,414	1,511	1,926	2,051
Percentage of sales	12.3	15.6	17.8	10.3	22.8	21.5
Percentage of capital	15.2	38.2	31.1	18.5	34.7	28.7

**Group results**

Sales	N/A	29,684	46,600	63,100	79,755	82,913
Net profit	1,783	3,359	6,248	8,273	10,834	7,193
Average capital employed	10,233	17,354	26,961	34,396	46,288	54,961
Percentage of sales	N/A	11.3	13.4	13.1	13.6	8.7
Percentage of capital employed	17.4	19.4	23.2	24.1	23.4	13.1

APPENDIX 10  
(referred to in paragraph 169)

**Summary of Ozalid Group Holdings Limited's sources  
and uses of funds 1968 to 1975**

	<i>£'000</i>	<i>Total 1968-1975 £'000</i>
<b>Sources of funds</b>		
Profit before taxation		40,313
Tax payments		(14,211)
Dividends		(9,424)
Retained profit		<u>16,678</u>
Depreciation		<u>11,288</u>
Cash flow (internal)		27,966
Investment grants		<u>91</u>
		<u>28,057</u>
<b>Other sources:</b>		
Ordinary share capital		12,868
Convertible loan stock		1,731
Overseas bank loans		7,770
Other loans		4,155
Surplus on sale of investments		<u>1,194</u>
		<u>55,775</u>
<b>Uses of funds</b>		
Fixed assets	25,294	
Purchase of goodwill on acquisition of subsidiaries	6,329	
Increase in investments (including associated companies)	4,524	
Increase in working capital	17,647	
Minority shareholders interests	(1,258)	
Sundry or special items	<u>474</u>	
		<u>53,010</u>
Increase in cash and short-term funds		<u>2,765</u>
<b>The increase in cash and short-term funds comprises:</b>		
Increase in cash and bank balances		3,706
Increase in short-term funds		4,581
(Increase) in bank overdraft		<u>(5,522)</u>
As above		<u>2,765</u>

*Note: The adjustments to fixed assets arising on the realignment of currencies are included in sundry or special items.*

## Index

- Aqueous materials *see* Coating, Film,  
Opaque materials, Papers
- Activated diazo  
coatings, 22
- Addressograph-Multigraph Ltd  
complex monopoly situation: views on  
existence, 185  
conditions of sale, appendix 8  
diaz copying machines: supply, 19, 115,  
118, 211, 212, 224  
discounts *see* Discounts  
distribution, 116  
employment in production of reference  
goods, 108  
history, 41, 103–107  
importation of microfilm, 29  
plant manufacturing reference goods, 108  
prices *see* Prices  
profits, 170  
range of products, 23, 26, 111–114  
research and development, 109  
sales of reference goods compared to  
total sales, 110  
share of market for reference goods, 16  
submission of evidence, 3, 6–8  
views on existence of registrable  
agreements, 1968–1972, 149–151
- Admel International Ltd  
acquisition by Addressograph-Multigraph  
Ltd, 106
- Angula Engineering Company Ltd  
importation of reference goods, 32
- Administration  
economies of scale, 18
- Agreements, registrable *see* Registrable  
agreements
- Base materials  
costs, 17  
major manufacturers, 17
- Bexford Ltd *see* ICI Ltd
- Block, Anderson and Kolok Ltd  
acquisition by Ozalid Group Holdings  
Ltd, 51, 217
- Brand loyalty  
machines, 28, 243  
materials, 28
- Capacity, excess, 40, 46, 245
- Capital *see* Ozalid Group Ltd
- Charges *see* Prices
- Coating  
aqueous: excess capacity, 40, 46, 245
- Competition  
(*see also* Discounts; Drawing Office Supplies;  
Machines, diazo; Prices)  
effect on prices, 97–99, 117  
from other reprographic methods, 40,  
42–44, 251  
views of: customers, 173–176;  
manufacturers, 189–196
- COM *see* Computer output on microfilm
- Complex monopoly situation *see* Monopoly  
situation
- Computer output on microfilm  
processes, 14, 15
- Conclusions of the Report  
discount systems in use, 255–258  
effect of Ozalid Group Holdings Ltd's  
position in the market on the public  
interest, 238–250, 261  
future of the industry, 251–254  
monopoly situation: existence, 5, 6, 184,  
227–237  
supply of diazo machines, 259, 260
- Conditions of sale, appendix 8
- Costs *see* Ozalid Group Holdings Ltd
- Diazo  
machinery *see* Machines, diazo  
microfilm *see* Microfilm  
processes *see* Processes, diazo
- Discounts  
(*see also* Prices)  
Addressograph-Multigraph Ltd  
changes, 1968–1976, 119, 120, 152–158,  
appendices 4, 5  
current, 121, 185  
November 1976, appendix 8  
paper, medium white: November 1976,  
158  
special terms, 122, 157, 158  
agreements  
ended after 1972, 147  
1956–1964, 142, 143  
1968–1972, 145, 146, 148–151  
pre-1956, 142  
competition, 152–158, 189–196, 233, 234,  
252–254  
conclusions of the report, 255–258  
GAF (Great Britain) Ltd  
changes, 1968–1976, 99, 152–158,  
appendices 4, 5  
competitive changes, 1968 to date,  
152–158  
current, 100, 198  
November 1976, appendix 8  
paper, medium white: November 1976  
(table), 158  
special terms, 101, 157, 158  
given to trade houses by manufacturers,  
207  
Harper and Tunstall Ltd  
changes, 1969–1976, 136, 152–158,  
appendices 4, 5  
current, 137, 138, 187, 198  
November 1976, appendix 8  
paper, medium white: November  
1976, 158  
special terms, 138, 157, 158  
history, 142–144  
Ozalid Group Holdings Ltd  
changes, 1968–1976, 74, 76, 152–158,  
appendices 4, 5

---

*References are to paragraph numbers, not page numbers*

**Discounts—continued**

- current, 186, 197
- November 1976, appendix 8
- paper, medium white: November 1976 (table), 158
- special terms, 75, 79, 157, 158, 258
- 'price war', 40, 143–145, 189–196, 233, 234
- quantity discount schemes
  - conclusions of the Report, 255, 256
  - submissions of manufacturers, 199–201
- Regma (UK) Ltd, 140
- special discounts: conclusions of the Report, 257, 258
- views of customers, 173–176

**Distribution**

- (*see also* Trade houses)
- Addressograph-Multigraph Ltd, 116
- economies of scale, 18
- GAF (Great Britain) Ltd, 88, 96
- Harper and Tunstall Ltd, 129, 133
- manufacturers' sales points, 20
- Ozalid Group Holdings Ltd *see* Trade houses
- Regma (UK) Ltd, 139
- DOMMDA *see* Drawing Office Materials Manufacturers' and Dealers' Association
- Drawing Office Materials Manufacturers' and Dealers' Association
  - functions, 36
  - membership, 20
  - price agreements, 142
  - submission of evidence, 4

**Drawing Office Supplies**

- supply by: Addressograph-Multigraph Ltd, 19, 105; GAF (Great Britain) Ltd, 19, 95; Harper and Tunstall Ltd, 19, 132; Ozalid Group Holdings Ltd, 19, 217

**Duties, import *see* Importation**

**Economies of scale**

- administration, 18
- distribution, 18
- Ozalid Group Holdings Ltd, 218, 240
- production, 18
- research and development, 18

**Electrostatic copying**

- competition with diazo processes, 40, 43, 44

**Employment**

- UK manufacture of reference goods, 60, 108, 128

**Entwistle Thorpe Ltd, 16, appendix 2**

**Evidence *see* Views of interested parties**

**Excess capacity, 40, 46, 245**

**Exportation**

- Ozalid Group Holdings Ltd, 31, 160, 163, 247, appendix 9
- total reference goods, 31

**Federation of Engineers' Sensitised Material Manufacturers**

- exchange of price information, 142
- price agreement, 142

**Film, polyester**

- (*see also* Microfilm)
- prices, 1968–1976, appendices 6, 7
- purchasing agreement between Ozalid Group Holdings Ltd and ICI Ltd, 66–68, 216, 242, appendix 2
- share of market, 21
- technical lead by Ozalid Group Holdings Ltd, 220

**Foreign trade *see* Exportation, Importation**

**GAF (Great Britain) Ltd**

- conditions of sale, appendix 8
- discounts *see* Discounts
- distribution, 88, 96
- employment, 87
- formation, 41, 82–86
- importation of microfilm, 29
- plant, 87
- pressure on trade houses to maintain recommended prices denied, 208
- prices *see* Prices
- profits, 170
- range of products, 23, 26, 89–92
- research and development *see* Research and development
- submission of evidence, 3, 6–8
- share of market for reference goods, 16
- supply of diazo machines, 19, 93, 94, 102, 211, 212, 224
- supply of drawing office materials, 19, 95
- views on existence of: complex monopoly situation, 188; registrable agreements, 1968–1972, 149–151

**Gem Photocopying Machines Ltd**

- supply of diazo machines, 19

**Harper and Tunstall Ltd**

- conditions of sale, appendix 8
- constituent firms, 125
- discounts *see* Discounts
- distribution, 129, 133
- employment on reference activities, 128
- history, 123–125
- prices *see* Prices
- profits, 170
- range of products, 23, 130, 131
- reprographic centres, 124, 126
- share of market for reference goods, 16
- submission of evidence, 3, 6–8
- supply of: diazo machines, 19, 127, 134, 211, 212, 224, 260; drawing office requisites, 132
- views on existence of: complex monopoly situation, 187; registrable agreements, 1968–1972, 149–151

**Her Majesty's Stationery Office**

- supply of diazo materials by GAF (Great Britain) Ltd, 101

**History of the industry**

- after 1945, 40, 41
- before 1945, 37–39

**HMSO *see* Her Majesty's Stationery Office**

**Hythe Coatings Ltd**

- acquisition by Ozalid Group Holdings Ltd, 51

---

*References are to paragraph numbers, not page numbers*

- ICI Ltd  
 Agreements with Ozalid through Bexford Ltd  
 distribution, 66  
 Manufacture of polyester film, 17  
 polyester film purchases, 29, 66–68, 216, 242, appendix 2  
 sale of shares in Bexford Ltd to Ozalid Group Holdings Ltd, 54, 66  
 technical collaboration, 66
- Import duties *see* Importation of reference goods
- Importation of reference goods  
 Angula Engineering Company Ltd, 32  
 duties, 34, 35  
 GAF (Great Britain) Ltd, 29  
 'know how': licensing by Océ van der Grinten, 33  
 Malmesbury Diazo Coaters Ltd, 16, 32  
 microfilm, 29  
 Myson Diazo Ltd, 32  
 Regma (UK) Ltd, 32  
 Rugby Design and Engineering Services Ltd, 32  
 vesicular microfilm, 29
- Linen materials  
 phasing out, 178, 204
- Machines, diazo  
 brand loyalty, 28  
 copying services supplied by trade houses: cost advantage, 207  
 link with sales of materials, 218, 224, 243  
 supply by Addressograph-Multigraph Ltd, 19, 115, 118, 211, 212, 224  
 supply by GAF (Great Britain) Ltd, 19, 93, 94, 102, 211, 212, 224  
 supply by Gem Photocopying Machines Ltd, 19  
 supply by Harper and Tunstall Ltd, 19, 127, 134, 211, 212, 224, 260  
 supply by Ozalid Group Holdings Ltd, 19, 79–81, 164, 165, 167, 211, 212, 218, 259, 260
- Malmesbury Diazo Coaters Ltd  
 description, appendix 2  
 import of diazo polyester film, 16, 32
- Management  
 economies of scale, 18
- Mason (EN) Ltd  
 acquisition by Ozalid Group Holdings Ltd, 41, 51, 52, 143, 144, 214, 215  
 merger with Nig Manufacturing Ltd, 52
- Materials *see* Activated diazo; Base materials; Coating; Film, polyester; Linen materials; Microfilm; Opaque materials; Pressure diazo; Translucent materials
- Membership of the Committee, 2
- Mergers *see* Block, Anderson and Kolok Ltd; Hythe Coatings Ltd; Mason (EN) Ltd; Nig Banda Ltd; Nig Manufacturing Ltd; Nig Mason Ltd
- Metriation *see* Sizes
- Microfilm, 14, 15, 29, 43, appendix 2
- Monopolies and Mergers Commission  
 views *see* Conclusions of the report
- Monopoly situation, complex  
 Addressograph-Multigraph Ltd: views, 185  
 GAF (Great Britain) Ltd: views, 188  
 Harper and Tunstall Ltd: views, 187  
 Monopolies and Mergers Commission: views, 5, 6, 184, 227–237  
 Ozalid Group Holdings Ltd: views, 186  
 registrable agreements: effect, 185, 186
- Myson Diazo Ltd  
 importation of reference goods, 32
- Nash (William) Ltd  
 manufacture of base paper, 17
- Nig Banda Ltd  
 formation, 52
- Nig Manufacturing Ltd  
 acquisition by Ozalid Group Holdings Ltd, 41  
 merger with E N Mason Ltd, 52
- Nig Mason Ltd  
 formation, 52  
 merger with Block, Anderson and Kolok Ltd, 52, 217
- Océ van der Grinten  
 licensing of technology to Ozalid Group Holdings Ltd, 33, 53
- Office supplies *see* Drawing Office Supplies
- Opaque materials  
 (*see also* Film, Papers)  
 uses, 13
- Ozalid Group Holdings Ltd  
 acquisitions  
 shares in Bexford Ltd from ICI Ltd, 54, 66  
 shares in overseas companies, 54  
 trade houses *see* Trade houses  
 agreements with ICI through Bexford Ltd  
 distribution, 66  
 polyester film purchases, 29, 66–68, 216, 242, appendix 2  
 technical collaboration, 66  
 capital  
 amount employed, 1966, 1969, 1972–1975, appendix 9  
 return (historic cost basis), 161  
 complex monopoly situation: views on existence, 186  
 conditions of sale, appendix 8  
 costs, 164–169; price advantage in purchase of polyester film, 17, 66–68  
 discounts *see* Discounts  
 distribution *see* Trade houses  
 economies of scale, 218, 241  
 efficiency, 220–223, 244  
 employment in UK, 60  
 excess capacity: aqueous coating, 46, 245  
 exportation of reference goods, 31, 160, 163, 247  
 funds: sources and uses, 1968–1975, 169, appendix 10  
 history, 47–58

---

*References are to paragraph numbers, not page numbers*

**Ozalid Group Holdings Ltd—continued**

importation of microfilm, 29  
licensing of technology from Océ van der Grinten, 33, 69  
managerial reorganisations, 57, 58, 222  
organisation chart, appendix 3  
organisation: present position in the UK, 59, 60  
plants in the United Kingdom, 61  
polyester films: international lead in technology, 220  
pressure on trade houses to maintain recommended prices denied, 208  
prices *see* Prices  
profits, 162, 165–169, 224–226, 248–250, appendix 9  
range of products, 23, 26, 69, 70  
reorganisations, 57, 58, 222  
sales, 31, 160, 162, 163, 247, appendix 9  
share of market for reference goods, 16, 30, 31, 214, 228, 238, 250  
size compared to competitors, 213, 241  
submission of evidence, 3, 6–8  
supply of diazo machines, 19, 79–81, 164, 165, 167, 211, 212, 218, 259, 260  
take-overs  
    Block, Anderson and Kolok Ltd, 51  
    Hythe Coatings Ltd, 51  
    Mason (EN) Ltd, 41, 51, 52, 143, 144, 214, 215  
    Nig Manufacturing Ltd, 41  
technical developments, 221, 244, 247  
views on existence of registrable agreements, 149–151

**Packaging**  
    standardisation, 24

**Papers**  
    opaque  
        medium weight: selling price, 1976, 158; share of market, 21  
    selected prices, November 1976, appendix 7

**Polyester film** *see* Film, polyester

**Pressure diazo materials**  
    prices: Addressograph-Multigraph Ltd, 119

**'Price War'** *see* Prices

**Prices**

(*see also* Discounts)

Addressograph-Multigraph Ltd  
    changes, 1968–1976, 120, 152–158, appendix 4  
    compared to competitors, 117  
    current, 121, 185  
    papers, 158, appendix 7  
    polyester film, appendices 6, 7  
    pressure diazo materials, 119  
    special terms, 122, 157, 158  
agreements  
    ended after 1972, 147  
    1956–1964, 142, 143  
    1968–1972, 145, 146, 148–151  
    pre 1956, 142  
competition, 152–158, 189–196, 233, 234, 252–254

**Prices—continued**

GAF (Great Britain) Ltd  
    changes, 1968–1976, 99, 152–158, appendix 4  
    current, 198  
    Ozalid's effect as 'price leader', 97–99  
    papers, 158, appendix 7  
    polyester films, appendices 6, 7  
Harper and Tunstall Ltd  
    changes, 1969–1976, 136, 152–158, appendix 4  
    compared with competitors, 135  
    current, 137, 187, 198  
    papers, 158, appendix 7  
    polyester films, appendices 6, 7  
    special terms, 138, 157, 158  
history, 142–144  
losses on supply of diazo machines, 19, 118, 167, 170, 211, 212, 224, 259, 260  
non standard sizes, 22, 24  
Ozalid Group Holdings Ltd  
    changes, 1968–1976, 76, 152–158  
    current rates, 78, 197  
    discount policy, 74, 77  
    papers, 158, appendix 7  
    policy, 72–74, 186  
    polyester films, appendices 6, 7  
    price leader 'effect', 71, 97–99, 117, 135, 153–155, 190, 191  
    rebates *see* special terms  
    special terms, 75, 157, 158; to own trade houses, 56, 79, 210, 211, 239  
    'price war', 40, 143–145, 189–196, 233, 234  
Regma (UK) Ltd, 140  
stability: advantages, 192  
trade houses: retail prices, 159, 181, 208  
views of customers, 173–176  
Processes, diazo, 11, 12, 22, 42–44  
Product differentiation *see* Brand loyalty  
Production  
    economies of scale, 18  
Production techniques, appendix 1  
Profits *see* Addressograph-Multigraph Ltd, GAF (Great Britain) Ltd, Harper and Tunstall Ltd, Ozalid Group Holdings Ltd  
Public interest  
    the conclusions of the report, 238–250, 261  
Reed Paper and Board UK Ltd  
    manufacture of base paper, 17  
Reference  
    formal wording, 1  
    materials covered, 9, 10  
Registrable agreements *see* Restrictive Trade Practices Act 1956  
Regma (UK) Ltd  
    discounts *see* Discounts  
    distribution, 139  
    entry into the market: effect on competition, 152  
    importation of reference goods, 32, 139  
    prices *see* Prices  
    range of reference goods supplied, 139

*References are to paragraph numbers, not page numbers*

- Regma (UK) Ltd—*continued*  
 sales of reference goods, 1974–1975, 141  
 share of market for reference goods, 16
- Restrictive Trade Practices Act 1956  
 agreements registered by Ozalid Group Holdings Ltd/ICI Ltd/Bexford Ltd, 66
- registrable agreements  
 bearing on existence of monopoly, 185, 186  
 controversy over existence, 6, 148, 149–151, 231, 232, 234–236, 261  
 registration of price information exchange agreement, 142
- Research and development  
 Addressograph-Multigraph Ltd, 109  
 economies of scale, 18, 241  
 GAF (Great Britain) Ltd, 87  
 Ozalid Group Holdings Ltd: economies of scale, 241; expenditure, 65
- Rugby Design and Engineering Services Ltd  
 importation of reference goods, 32
- Sale conditions, appendix 8
- Sales  
 (*see also* Addressograph-Multigraph Ltd, GAF (Great Britain) Ltd, Harper and Tunstall Ltd, Ozalid Group Holdings Ltd, Regma (UK) Ltd)  
 total value of diazo materials supplied, 1973–74/1974–75, 30  
 total volume of diazo materials supplied, 1969–75, 45
- Sensitizers (Western) Ltd, 16, appendix 2
- Sizes  
 metrication, 24, 25, 178, 202, 246  
 non-standard, 22, 24, 178, 202  
 range supplied, 23, 246
- Solvent materials *see* Film, Paper, Translucent materials
- Standardisation *see* Packaging, Sizes, Weights of base papers
- Trade houses  
 acquisition by Ozalid Group Holdings Ltd, 56, 181, 209, 219, 239  
 competition by direct selling by manufacturers, 180, 205–207  
 functions, 205  
 prices charged to customers, 159, 181, 208  
 sales by GAF (Great Britain) Ltd, 96  
 sales of: all goods to group trade houses, 1972–1975, 162; reference goods to trade houses, 163  
 share of home sales of Ozalid Group Holdings Ltd, 64  
 special terms offered by Ozalid Group Holdings Ltd to its own trade houses, 56, 79, 209, 210, 258  
 supply by Harper and Tunstall Ltd, 133  
 supply of photocopying services: cost advantages, 207  
 views on ownership of trade houses by Ozalid Group Holdings Ltd, 181
- Translucent materials  
 uses, 13
- Vesicular microfilm *see* Microfilm
- Views of interested parties  
 discounts, 173–176  
 prices, 173–176  
 quality of goods, 172  
 rationalisation of product range, 178  
 service, 172  
 standardisation of product range, 178  
 trade houses, 180, 181
- Weights of base papers  
 reduction, 27, 178, 203, 246
- West (A) and Partners Ltd, 16, appendix 2
- William Nash Ltd *see* Nash (William) Ltd
- Winterbottom Products Ltd, 16, appendix 2

---

*References are to paragraph numbers, not page numbers*