

MAN-POWER

A total number of 34,000 labour units have been withdrawn from primary industries for home defence or service overseas. Some of these were absent for short periods only, and at least 16,000 were returned to their former employment prior to the close of the past season. In addition, farm labour has been recruited from other occupations or from family labour, leaving a net deficiency of approximately 10,000 to 12,000 units. It is expected that arrangements now completed will rectify this shortage.

FERTILIZER-SUPPLIES

The entry of Japan into the war precipitated a crisis in fertilizer-supplies. Rationing was introduced, and the limited quantity available for top-dressing pasture has had a detrimental reaction on soil fertility and pasture growth. These effects were particularly noticeable under adverse climatic conditions experienced last season.

A comparison of production under war conditions with that of the period of normal activity preceding 1939 is of interest. The following tables give average production of our principal live-stock and cropping industries for the five seasons ending in 1939 with comparable data for the war period.

LIVE-STOCK PRODUCTION

Season.	Estimated Total Production in Long Tons.		
	Butterfat : Year ended 31st July.	Meat : Year ended 30th September.	Wool : Year ended 30th June.
Average of five seasons, 1934-35 to 1938-39	185,000	470,000* (Three seasons only)	134,000
1939-40	185,400	535,000†	138,000
1940-41	200,400	515,000†	148,000
1941-42	188,700	535,000†	154,000
1942-43	174,700	537,000	152,000
1943-44‡	166,000	486,000	147,000
Average of five seasons, 1939-40 to 1943-44	183,000	522,000	148,000

* Years ended 30th June.

† Assessments.

‡ Forecasts.

CASH CROPS : ACRES IN CROP

Season.	Areas threshed.					Commercial Areas outside Boroughs.		Total.
	Wheat.	Oats.	Barley.	Maize.	Peas and Beans.	Potatoes.	Onions.	
Average of five seasons, 1934-35 to 1938-39	214,200	63,400	22,400	6,900	19,100	21,900	800	348,700
1939-40	257,500	49,800	25,300	8,000	21,400	20,000	800	382,800
1940-41	243,200	71,700	32,000	10,800	35,100	17,000	900	410,700
1941-42	258,000	70,800	36,000	8,800	31,300	15,200	800	420,900
1942-43	287,000	56,300	28,600	7,300	33,300	23,900	1,000	437,400
1943-44*	246,000	48,400	32,800	7,000	47,500	27,000	1,000	409,700
Average of five seasons, 1939-40 to 1943-44	258,300	59,400	31,000	8,400	33,700	20,600	900	412,300

* Forecasts.

The cumulative effect of factors beyond the control of producers is noticeable in butterfat and meat production. To some extent the meat situation is influenced by heavy killings of capital stock during 1942 and 1943 and a reversal of this tendency in the 1943-44 season. The dairying industry