

The period 1929-30 is taken as being more typical of normal conditions than the period 1930-31, since by 1931 the economic depression was well under way, and employment conditions were not normal.

Certain definite trends are observable during that period. The grain-milling and grain-crushing industries have been stable over the period. New Zealand normally does not produce wheat for export, but imports wheat, not flour. Consequently there is a relative stability in the grain-milling industry, the size of which is determined by the consumption of flour and related products in New Zealand. There has been a major expansion in the meat freezing and preserving industry from the low figure of 6,139 employees in 1929-30 to its peak in 1943-44, when 10,186 were so engaged. This figure is probably abnormally high because of the major food-production drive which was taking place as a result of the war. On the other hand, due to the international shortage of animal and other foods, it is possible that this figure will remain high for some time.

The expansion of the ham and bacon curing industry is merely a reflex of the growth of the dairying industry over the period. Pig-meats have become of very great importance, and particularly so during the time the American troops were in the South Pacific area.

There were interesting developments in the fish curing and preserving industry, in which small scale operations have commenced.

The increase in the tanning industry over the period is directly related to the war and to the inability to import leathers from abroad. There has been a substantial expansion of this industry during the war, and, other things being equal, this expansion will probably have permanent results. A similar explanation can be given for the major expansion of fellmongery and woolscouring. Recent tendencies, however, suggest that this industry may decline in importance. The expansion in the sawmilling and sash and door making industry (of which the sash and door making part is relatively unimportant) is closely related to the expansion of building programmes, while the fall during the war is related to the depletion of this industry for war purposes, a Forestry Unit being sent overseas early in the war.

Of the contracting industries the most important feature is the fall in the number engaged in butter, cheese, and condensed-milk manufacture. While some of the fall in later years was doubtless related to the war and to the fall in dairy production, the fall as between 1929-30 and 1937-38 is probably accounted for by the zoning of dairy-factory suppliers early in the fourth decade. As a result some superfluous factories were eliminated and the industry put on to a much more efficient basis.

The fall in the number of those engaged in phormium-flax milling is merely indicative of the decline in the flaxmilling industry. Strenuous steps were taken to revive the industry, but the onset of the war had some adverse effect in this regard.

Summing up the above discussion relating to semi-primary industries, it can be seen that in general there has been a fairly steady expansion over the period. With the exception of certain small industries this expansion has been closely related to the expansion of the agricultural industry, and calls for no important comments except to say that the relative position of these industries has declined. In the earlier days the semi-primary industries were all-important. To-day they have declined in relative importance due to the expansion of what might be more correctly called the secondary industries.

C. MANUFACTURING INDUSTRIES

A definite change took place in the development of secondary industries in New Zealand during and subsequent to the depression.

The real expansion of secondary production in New Zealand took place during and subsequent to the depression. Several factors are responsible for this development. During the ten years prior to the recent war international trade was seriously restricted,