

11. *Bricks, Pipes, Tiles, and Pottery Making.*

Official statistics—	1934-35.	1935-36.	1936-37.	1937-38.
Establishments (number) ..	54	58	62	60
Employees (number) ..	618	777	772	909
Salaries and wages paid ..	£111,988	£142,242	£190,038	£200,835
Value of output ..	£285,164	£347,562	£429,891	£483,206
Value added by manufacture ..	£264,729	£320,554	£394,311	£442,635

The year has been a busy one, a considerable part of production being devoted to fulfilling contracts from the Government Housing Construction Department.

12. *Flaxmilling.*

Official statistics—	1934-35.	1935-36.	1936-37.	1937-38.
Establishments (number) ..	21	29	32	33
Employees (number) ..	316	506	540	537
Salaries and wages paid ..	£42,160	£69,367	£92,202	£104,169
Value of output ..	£80,711	£138,336	£179,323	£177,512
Value added by manufacture ..	£68,911	£118,430	£160,656	£163,158

Conditions prevailing in the flaxmilling industry are referred to in an earlier section of this report.

13. *Rope and Twine Making.*

Official statistics—	1934-35.	1935-36.	1936-37.	1937-38.
Establishments (number) ..	6	8	7	7
Employees (number) ..	228	243	243	240
Salaries and wages paid ..	£36,052	£39,747	£44,118	£45,102
Value of output ..	£128,506	£159,925	£180,796	£191,864
Value added by manufacture ..	£69,668	£87,362	£91,214	£80,723

Business has been steady for the greater part of the year, but since the advent of the Import Regulations a definite stimulus has been felt in the demand for shop and seaming twines. Rope and lashing sales have been fairly good throughout the year, and it is not expected that Import Control will stimulate them appreciably as importations in past years have been negligible. The use of improved harvesting machinery has diminished the demand for binder-twine, several small factories having been absorbed during the year.

14. *Clothing.*

Official statistics—	1934-35.	1935-36.	1936-37.	1937-38.
Establishments (number) ..	290	318	336	357
Employees (number) ..	9,394	10,296	11,828	12,916
Salaries and wages paid ..	£952,844	£1,025,510	£1,322,388	£1,542,933
Value of output ..	£2,958,508	£3,090,027	£3,663,107	£3,962,056
Value added by manufacture ..	£1,391,877	£1,508,550	£1,823,727	£2,062,746
Imports, calendar years: Apparel and ready-made clothing ..	£1,101,887	£1,261,804	£1,814,116	£1,511,897

During the first half of the year trading conditions were difficult, particularly in the small factories. Sales were dropping and staff was considerably reduced. Between August and November conditions improved, and the new tariff helped the smaller factories somewhat. Rush conditions prevailed in ladies' frocks and men's outer clothing, and the Christmas period was uniformly good. The present position is that factories are receiving more work than can be immediately handled. Female labour is extremely scarce, manufacturers bidding against one another for experienced hands. Small dressmaking-shops are prepared to pay high wages to attract girls from factories, a fact which is disturbing to the trade. Millinery-manufacturers, costume and mantle manufacturers, and tailors have experienced steady business during the year and are very optimistic of the future. Staffs have increased in these concerns also.

15. *Agriculture and Dairy Machinery and Implement Making.*

Official statistics—	1934-35.	1935-36.	1936-37.	1937-38.
Establishments (number) ..	44	46	54	57
Employees (number) ..	689	880	1,152	1,200
Salaries and wages paid ..	£127,124	£166,227	£257,084	£271,097
Value of output ..	£492,925	£692,141	£1,091,275	£1,229,279
Value added by manufacture ..	£239,354	£352,041	£526,134	£550,380

Business was fairly plentiful during the early portion of the year, but slackened off to a marked degree. Sales show a decrease and staffs have been reduced, extremely keen foreign competition being the cause of the slackness. With the further fall in wool returns this season the outlook for the immediate future is not bright. It is considered that the recent import restrictions will not be immediately beneficial to the industry as very heavy stocks are being held by local manufacturers, and agents of overseas factories are also holding large stocks of farm implements.