

throughout the freezing-season. Slaughtering of lambs for export was very heavy, although weather conditions led to a somewhat undue proportion of unfinished carcasses reaching the works. Mutton-killings were on a fair scale. Even more satisfactory, from a basic aspect, has been the reversal of the regrettable downward movement in our sheep-stocks which had marked the preceding four or five years. The returns for 1923 showed an increase of some 850,000 head, with, moreover, the number of breeding-ewes at great strength; and the 1924 enumeration has added another half-million to the flocks of the Dominion. Another good feature was the high average lambing percentage of 1923, with a correspondingly large crop of lambs. On the year's returns—in wool, mutton, lamb, and by-products combined—the sheep stands out as still the leading primary wealth producer in the Dominion's agricultural industry. Altogether 1923–24 will be remembered as a sheep-farmers' year *par excellence*.

On the other hand, the period under review brought no great improvement for the beef-producer. This was reflected in the reduced volume of exports, although several large shipments of North Island live fat cattle to Australia retrieved the situation to some extent. It must be recognized, however, that the local market absorbs the larger part of the country's beef-production, also that exportation provides a fair outlet for cow beef (largely in the boned form), which may be considered as to a great extent a by-product of the dairy industry. Fortunately, the beef trade is one of lesser importance to New Zealand, and the maintenance of cattle-raising largely finds its warrant in connection with pasture-management, particularly in North Island broken country. So far the total number of cattle, apart from dairy cows, has been well maintained. It is worthy of note that the consumption of beef in the Dominion increased substantially during the past year.

The dairy industry has continued to develop, and recent statistics indicate that New Zealand still holds its gradually achieved position as the largest exporter of dairy-produce in the world. During the past season the industry operated with an increased number of dairy cows, but owing to less favourable weather conditions the production of butterfat has remained practically stationary at the very high level attained in 1922–23. Cheesemaking was practised by most of the large dual-plant factories, with a result that the cheese branch of the industry has shown an increased output of about 21 per cent., while the butter-output has decreased by some 9 per cent. The British markets have experienced great fluctuations, but it is anticipated that the average returns to factory-suppliers will be much on a par with those of the preceding year. The export value of milk-products for the past year is placed in round numbers at the great sum of 18½ millions sterling, chiefly representing butter and cheese, but also including substantial quantities of milk-powder, preserved milk, and casein. It is satisfactory to be able to record a further large development in the herd-testing movement, bringing the total number of cows so dealt with up to, roundly, 150,000. The complementary "C.O.R." system of testing purebred dairy cows has also shown further expansion.

An industry with considerable potentialities, and largely allied to dairying, is that of pig-raising. The number of pigs in the Dominion continues to increase, this year by another 20,000—but comparatively little progress can be recorded in the export trade to Britain. Surplus bacon and hams found a good outlet in Australia, while only limited shipments of frozen pork were made to the British market.

Animal husbandry is so paramount in New Zealand farming that the health of all live-stock is a matter of first importance. The Dominion may be congratulated on its continued freedom from such scourges as foot-and-mouth disease, tick fever, pleuro-pneumonia, and others. During the year precautionary measures designed to minimize the danger of introducing such diseases from overseas have been tightened up all round.

With regard to cereal-production, a heavy decrease again took place in the areas sown in wheat and oats for threshing purposes, while dry weather caused a reduction in the per-acre yields of both these crops to considerably below average New Zealand figures. Oats for chaff increased in area, but gave a much lower total yield