

The Japanese Army

I. ANSWERS TO QUESTIONS CONCERNING PRESENT DEGREE OF RECOVERY.

1. Summary of physical destruction and other losses.—The value of damages sustained by the Philippines as a result of the war (based on reports still incomplete) amounts to about P2,740,526,649 distributed as follows: real estate improvements, including government buildings, private residential and commercial structures, churches and other religious institutions, P539,374,320 or 19.7 per cent; government corporations, P81,756,232 or 3.0 per cent; industrial and commercial properties, P512,950,454 or 18.7 per cent; agriculture, P281,170,790 or 10.3 per cent; public works improvements, excluding damages in the provinces of Agusan, Batanes, Bukidnon, Catanduanes, Cotabato, Palawan and Zamboanga, P244,988,081 or 8.9 per cent; personal effects, such as clothes and linen, house furniture, fixtures and utensils, motor cars, jewelry, books, etc, P413,778,327 or 15.1 per cent; government offices, exclusive of buildings, P125,663,477 or 4.6 per cent; libraries (from reports of 3 public and 4 private libraries in Manila only), P5,624,968 or 0.2 per cent; and prewar value of Japanese notes issued in exchange for goods and services, P535,220,000 or 19.5 per cent.

The following table gives a summary of the war losses sustained by the Philippines:

ESTIMATED PHILIPPINE WAR DAMAGES (PARTIAL): DEC. 8, 1941 TO JULY 4, 1945
Based on reports received by the E.C.S. up to June 1946.

Item	1941 Value	Percentage of Distribution
Real estate improvements a/	539,374,320 1/	19.7
Government corporations	81,756,232 2/	3.0
Industrial and commercial properties.....	512,950,454	18.7
Public works improvements b/	244,988,081	8.9
Government offices c/	125,663,477 3/	4.6
Agriculture d/	281,170,790	10.3
Value of Japanese military notes issued e/..	535,220,000	19.5
Personal effects f/	413,778,327	15.1
Libraries g/	5,624,968	0.2
TOTAL	P2,740,526,649	100.00

Reduced to physical quantities, these losses are represented as follows:

- a. Destruction of houses.— About 270,000 private structures were destroyed rendering from 1,500,000 to 2,000,000 persons homeless.
- b. Government buildings.— The destruction of about 1,200 government structures has forced the government to occupy private buildings which could otherwise be utilized as dwellings.
- c. School buildings.— About 15,000 school buildings were destroyed, as a result of which thousands of children of school age are out of school.

The following table shows the estimated number of structures damaged as a result of war operations in the Philippines:

ESTIMATED NUMBER OF BUILDINGS AND OTHER STRUCTURES DAMAGED
AS A RESULT OF WAR OPERATIONS IN THE PHILIPPINES
December 8, 1941 - July 4, 1945

Items	Number
Public school buildings	15,100
Government offices and other government structures.....	1,200
Private residences	269,950
Business houses	8,800
Private schools, colleges, hospitals & other structures	100
Churches, convents & other religious structures	150
TOTAL	295,300

a/ Govt buildings included. b/ Excluding damages to Agusan, Batanes, Bukidnon, Catanduanes, Cotabato, Palawan and Zamboanga. c/ Does not include buildings; includes only office furniture & fixtures, supplies & materials, records, documents, books, journals, etc. d/ Includes crops, livestock & farm implements only. e/ Estimated prewar value of worthless Japanese notes issued in exchange for goods & services. f/ Clothes, furniture, fixtures & utensils, books, jewelry, cars, etc. g/ As reported by 2 public & 4 private university & college libraries in Manila. 1/ As reported by 831 municipalities and cities. 2/ Does not include buildings. 3/ As reported by 15 provincial, 5 city and 386 municipal governments and 46 bureaus and offices.

d. Damage to agriculture - The following table reflects the damages to farm crops, livestocks and poultry and farm implements.

TOTAL QUANTITY OF WAR DAMAGES TO AGRICULTURAL CROPS,
LIVESTOCK AND POULTRY AND FARM IMPLEMENTS IN THE
PHILIPPINES BY ITEM DECEMBER 8, 1941 TO JULY 4, 1945,
DUE TO LOOTING, REQUISITION, FIRE, CONFISCATION, ETC.

I t e m	: U n i t :	Quantity
T O T A L		
AGRICULTURAL CROPS -		
<u>Rice</u>		
Palay	Cavan	16,401,290
Rice (clean).....	"	2,015,740
<u>Corn</u>		
Corn (shelled).....	Cavan	3,775,180
Corn (ears)	Number	338,607,040
<u>Sugar cane</u>		
Sugar	Kilo	249,069,560
Canes	Ton	5,424,140
Molasses	Liter	10,007,930
Tobacco	Kilo	10,131,460
<u>Coconuts</u>		
Nuts	Number	515,744,010
Copra	Kilo	128,112,070
Oil	Liter	1,803,990
Tuba	"	8,337,040
Abaca	Kilo	118,537,600
Camote	"	126,742,060
Cassava	"	57,572,850
Gabe	"	13,688,490
Mongo	"	2,144,110
Bananas	"	71,489,100
Coffee	"	1,980,910
Cacao	"	355,520
Beans and vegetables	"	19,622,480
Fruits	"	22,746,200
All others	"	8,845,810
LIVESTOCK AND POULTRY -		
Cattle	Number	615,750
Carabaos	"	578,000
Horses	"	100,390
Pigs	"	1,239,700
Goats	"	75,620
Chickens	"	9,236,180
Ducks	"	288,800
<u>Eggs</u>		
Chickens	Number	34,451,930
Ducks	"	1,393,710
FARM IMPLEMENTS -		
Plows	Number	198,780
Harrows	"	113,650
Tractors	"	384
All others	"	414,990
MISCELLANEOUS	-	-

2. Brief summary of the effects of the war on population and manpower.-

The occupation of the Philippines by the enemy brought untold hardship and suffering upon the people. For about three years the inhabitants were on the verge of starvation. Food supply was forcibly appropriated by the enemy, food production was hampered and the livelihood of the people disrupted by war operations. The inevitable demoralization of the population resulting from the savage fight for existence manifested itself markedly even after liberation in increased crimes and social unrest. War mortality was enormous. Based on available figures, it may be estimated at around half a million.

The estimated labor supply for the Philippines, including all persons 10 years old and over who are able to work, follows:

1939 (Census year)	7,304,300
1941	7,720,200 -
1946	8,672,900

These estimates are based on the assumption that existing labor supply bears the same ratio to population as the labor supply in 1939. The casualties resulting from massacres by the Japanese, the battle for liberation and other war causes may reduce the estimates for 1946 by from 2 to 4 per cent.

3. Effect of war on rate of progress of industrialization and economic development.-

The destruction wrought by war caused a serious setback to the progress of industrialization and economic development. Before the war, Manila and commercial centers were teeming with large factories and industrial plants with all the modern equipment and facilities for turning out high-grade manufactures in commercial quantities. However, the sugar mills, rope factories, cigar and cigarette factories, coconut oil mills, etc., were laid prostrate in the wake of the liberation and unable to produce sorely needed goods. It will take considerable time before production can catch up with the demand both for local consumption and for export. Many of the prewar operators depend mostly on war damage payments for the rebuilding of their business but so far no payments have been made so that the prospects of early recovery of the prewar rate of industrialization and economic development is very dark. Rehabilitation is greatly handicapped by lack of coal and motive power, heavy machinery and perhaps technical guidance.

With 41 out of the 43 sugar centrals destroyed and 73 out of the 148 saw mills totally destroyed, production of sugar and lumber is very insignificant, as compared to prewar production. The same is true with the mining industry. Only copra is recovering rapidly with 45,000 tons shipped to the U.S. in June as compared to 33,000 prewar monthly average. The average for the six months ending June, 1946, was however 23,600 tons.

4. Consumption level of foodstuffs and other consumers goods.-

Rice.-Domestic consumption of rice before the war was 350 grams daily per capita, or a yearly per capita consumption of 2.28 cavanes of cleaned rice (56 kilos to a cavan). On the basis of an estimated population of 18,480,000 in 1946, out of which 69.5 per cent constitute the rice-eating population, a total of 29,283,400 cavanes of cleaned rice would be needed to support the population, as against the 1945-1946 crop of 17,067,140 cavanes of cleaned rice or a deficiency of 12,216,260 cavanes, which have to be supplied partly from imports and partly from rice substitutes, such as corn, cassava, gabe, tugui and other root crops.

Sugar.-Prewar consumption of sugar is estimated at 7 kilos or 15.4 pounds per capita, or a total estimated 1946 consumption of about 142,000 short tons. The estimated 1946-47 output of the 5 sugar centrals in operation is 66,000 short tons. There is, thus, a shortage of 76,000 short tons, which have to be wholly supplied from imports.

Meat.- Meat consumption in Manila before the war was 16 kilos or 35.2 pounds per capita. Because of the excessive postwar price of meat which is practically eight times that of prewar, a large portion of the population has shifted to canned foodstuffs, mostly imported from the United States. In view of present difficulties of collecting statistics on slaughtered animals in the provinces, however, there are now no means of ascertaining actual consumption data. It may be stated that the war had a most disastrous effect on the livestock industry.

Imports for consumption of the following articles may throw more light on consumption levels of various other commodities: (a)

Items	1941	Per capita	imports	1945	Per capita im-
	(Kilos)	(Kilos)	(Kilos)	(Kilos)	ports(Kilos)
Grains and preparations	139,330,412	8.30	65,823,548	3.57	
Meat and dairy products	20,824,766	1.83	12,480,576	.67	
Vegetables and preparations	28,986,842	1.72	6,800,886	.37	
	(Sq. yards)	(Sq. yards)	(Sq. yards)	(Sq. yards)	
Textiles and manu- factures	167,568,210	9.99	835,108	.045	

NOTE: (a) 1941 estimated population16,771,900
1945 " "18,415,100

4a. Present level of production in significant industries as compared with significant prewar years.-

The present level of production as compared with significant prewar years is as follows:

Items	Unit of measure	PRODUCTION	
		Pre-war 1940	Present 1946
Sugar, centrifugal	Short tons	1,044,000	13,000
Lumber	Board feet	340,400,000	150,000,000
Abaca	Bales	1,342,000	237,000
Copra	Tons	738,000	200,000
Coconut oil	Tons	243,000	(Nil)
Cigars	Thousand	331,600	50,000
Electricity	Kwh (thousand)	175,400	50,000
Mines, gold	Pesos	62,700,000	1,000,000

5. Present level of agricultural production compared with prewar.-

Rice.- The area planted for the crop year ending June 30, 1946 was 1,653,820 hectares, or about 21 per cent less than the prewar average of 2,096,720 hectares. The production was 36,134,280 cavanes (44 kilos) of palay (rough rice) or about 30 per cent below the prewar average of 51,401,660 cavan

Corn.- The area planted for the crop year ending June 30, 1946 was 522,570 hectares or about 43 per cent less than the prewar average of 911,140 hectares. The production was 5,178,000 cavanes of 58 kilos or about 45 per cent below the prewar average of 9,421,740 cavanes.

Sugar (centrifugal).- The present production is about 11,646,000 kilos, or about 98.82 per cent less than the prewar average of about 990,000,000 kilo. There were 5 centrals that started operation out of 42 before the war. About 3 more are ready to operate this coming milling season. There are at least two more sugar centrals ready to operate but they lack sugar cane to mill.

Wheat.— The production was about 30,000,000 kilos for the crop year ending June 30, 1946, or about 83 per cent less than the prewar average of 177,730,000 kilos.

Copra.— The production for the crop year ending June 30, 1946 was about 200,000,000 kilos or about 70 per cent less than the prewar average of about 675,000,000 kilos.

6. Present serviceable quantity of railroed rolling stock, trucks, air and water transport equipment (ocean-going and inland), as compared with a significant prewar period.—

The total rolling stock of the Manila Railroad Company is 1,905, including 73 locomotives, 67 passenger coaches, 1 rail motor car, 36 express, baggage and caboose cars, and 1,728 freight cars and service cars. As compared with the serviceable rolling stock in 1941, there is a decrease of 29 per cent in the grand total, and of the following percentages in the different types of rolling stock: About 49 per cent for locomotives; about 68 per cent for passenger coaches; over 98 per cent for rail motor cars; 100 per cent for rail motor car trailers (in 1941 there were 100 of them); about 62 per cent for express, baggage and caboose cars; and about 17 per cent for freight cars and service cars.

The Philippine Railway Company which operates lines in Cebu and Panay islands have not as yet submitted figures. Available prewar figures for this company give a total rolling stock of 388, consisting of 16 locomotives, 56 passenger cars and 266 freight cars. The Cities of Iloilo and Cebu were burned by the Japanese and it is more than likely that a large percentage of the rolling stock of the Philippine Railway Company might have been destroyed there.

The tramway transportation system in Manila, an American enterprise that before the war had around 150 electric cars and 300 buses, was entirely wiped out. The only visible assets in Manila are the tramway lines not removed or destroyed by the Japanese.

Before the war, there were two companies that operated scheduled airlines. They are the Philippine Air Transport Company and the Iloilo-Negros Air Express Company. Aside from the foregoing scheduled operators, there were six non-scheduled operators. All of the above scheduled and non-scheduled operators had during the fiscal year 1939-1940 a total of over 20 serviceable passenger and freight planes that carried 16,209 revenue passengers and a total freight of 3,098,271.50 pounds in air mail and air express. As of June 1946, there were a total of 37 commercial airplanes operated by the Far Eastern Air Transportation Company and the Philippine Air Lines for passenger and freight service and both have reported a total revenue passenger of 107,367 and freight consisting of mail and express totalling 7,727,258.30 pounds for the first half of the current year. The statistics indicate considerable progress over prewar commercial airplane operations.

Available prewar statistics on water transportation are those for 1940 when 730 ocean-going vessels with a total net tonnage of 2,755,606 and 3,547 inter-island and bay and river crafts of different categories (steamers, 62; steam launches, 28; motor ships and auxiliary schooners, 98; launches, boats, bancas with motor, 820; scows, lighters, barges, cascos, and bancas, 960; and sailing vessels, 1,515), with a total net tonnage of 154,613.20 were engaged in foreign and interisland and bay and river trade during that year. Postwar statistics on this subject are still being gathered, although it is of common knowledge and observation that water transportation facilities were among the worst hit during the war. The ocean-going vessels which mostly belonged to the belligerents were practically all wiped out, and present ocean-going steamers coming to the Islands are the few survivors and several new American-owned steamers. Ninety (90) per cent of the steamers belong to the United States; the rest belong to the British, Norwegians, Dutch, Danish and Chinese. Practically all the interisland steamers were sunk during the war. A few of the water-crafts of lesser categories, mostly sailing vessels, were able to survive.

As regards motor vehicle transportation, there were registered in 1940 (only complete available record) a total of 20,236 motor trucks and 33,878 automobiles, or a total of 54,134 motor cars and trucks. In 1945, the preliminary registration figures give a total of 8,996 for motor trucks and 3,824 for automobiles, Manila and Rizal excluded, or a total of 12,820. Adding the registration of 12,613 trucks and 6,476 automobiles for Manila and Rizal for the first part of 1946, we get a full total of 31,909 motor car registration in 1945-1946. This full total compared with that of 1940 shows a decrease of over 41 per cent.

7. Estimated attainable level, as compared with prewar output, or industrial and agricultural production.-

a. Damage to agricultural industry during the war may be conservatively estimated at about 33-1/3 per cent of the total value.

- (a) Sugar industry - 43 per cent of sugar centrals and refineries.
- (b) Tobacco industry - 60 per cent of prewar production.
- (c) Abaca industry - 30 per cent of the plantations, excluding damages to stripping machines, sheds, etc., worth more than P3,000,000.
- (d) Coconut industry - 50 per cent of the coconut oil and desiccated coconut factories, 40 per cent of copra driers, warehouses and other establishments and 5 per cent of coconut trees.

b. Attainable level of agricultural and industrial production assuming an adequate supply of raw materials and energy, compared with the prewar.

<u>Products</u>	<u>Unit</u>	<u>Prewar production</u>	<u>Attainable level of production</u>
Rice	Cavanas	51,401,660	40,000,000
Corn	"	9,421,740	6,000,000
Sugar -			
Centrifugal.....	Kilos	990,000,000	350,000,000
Muscovado	"	41,000,000	20,000,000
Abaca	"	177,730,000	100,000,000
Tobacco	"	42,000,000	20,000,000
Copra	"	675,000,000	500,000,000
Coconut oil	Tons	343,000	10,000
Lumber	Board feet	340,400,000	100,000,000
Embroideries		P17,755,000	P 1,000,000
Cigars	Thousand	331,600	50,000
Cigarettes	"	3,292,900	1,000,000
Cordage		P 3,300,000	P 1,000,000
Shoes	Pairs	2,455,600	500,000
Electricity	Kwh	175,400	75,000

8. To what extent has the lack of agricultural and industrial equipment impaired immediate recovery?

In the case of the sugar and tobacco industry, the lack of agricultural and industrial equipment will retard 60 per cent of their immediate recovery. In the case of lowland rice, about 10 per cent and for upland rice and corn, about 30 per cent. In the case of abaca, it will be around 40 per cent, for copra, 20 per cent, and for coconut oil, 50 per cent.

9. To what extent has the lack of raw materials impaired immediate recovery?

The lack of raw materials has not seriously impaired the immediate recovery of industries, with the exception of the sugar industry and to some extent of the abaca industry as almost all the sugar plantations were destroyed and some of the big abaca plantations were partly damaged due to war operations. The scarcity of hides for the shoe and slipper industry and for cannisters for the canning industry also handicaps the rapid recovery of these industries.

However, the key to immediate recovery is the restoration of the plants, heavy machinery and buildings to start sizeable production. The Philippines is endowed with plenty of raw materials so that lack of it is not so much a problem.

10. To what extent has lack of transport facilities impaired immediate recovery?

Immediate recovery is being impeded greatly by a lack of sufficient transportation facilities and this is particularly true in the case of inter-island transportation which has been crippled almost 100 per cent by the war and has affected seriously the shipment of lumber and other building materials as well as of foodstuffs and other necessities of life to the devastated areas. The wide disparity between the living cost in Manila and distant provinces is due largely to the lack of transportation facilities that hinder the flow of commerce to and from the metropolis. But even in overseas commerce, the lack of shipping lines to Europe and parts of Asia has left only the United States as the market for Philippine products which before the war had a much wider outlet, particularly for leaf tobacco, copra, Manila hemp, Manila rope, hides and skins, etc.

11. To what extent has the lack of financial means impaired immediate recovery?

Because of the insufficiency of government revenues, the Government has not been able to undertake any wide-scale reconstruction work. Damaged public buildings, roads, bridges, portworks, railroads, etc., are not as yet repaired pending the receipt of the P240,000,000 share of the Government from the Tydings War Damage Compensation Act.

The same can be said of private industry. Destroyed sugar centrals, tobacco factories, rice mills, lumber mills, coconut oil mills, desiccated coconut factories, rope factories, distilleries, shoe factories, mining works, etc., are still out of operation pending the receipt of substantial capital to rehabilitate them or to supply the much needed capital equipment almost totally destroyed by the war.

II. ANSWERS TO QUESTIONS CONCERNING LONG RANGE RECOVERY AND DEVELOPMENT PROGRAMS.

11a. What is the level of consumption of foodstuffs and other consumers goods and standards of housing, anticipated during the next 18 months, five years or more.

(See answer to question No. 4 concerning the level of consumption of foodstuffs and other consumers goods.) With the enormous destruction of dwelling especially in urban centers, thousands upon thousands of people are housed in temporary structures devoid of the necessary sanitation facilities. It may take 10 to 15 years before prewar standards of housing is restored.

12. Does the production pattern proposed in the country's development program differ materially from the prewar pattern and in what respects?

The production pattern proposed in the country's development will not differ materially from the prewar pattern except in the sugar industry where production may be reduced as a result of the destruction of machinery which was extensively used in this industry before the war. Owing to the destruction of work animals, the use of farm machinery is contemplated in the production of rice, corn, tobacco, root crops and vegetables besides sugar cane.

13. To what extent do the changes proposed in the prewar production pattern take into account the modifications in the economies of other countries?

The production pattern proposed for rice is based on the methods of production in the United States. For this purpose, an agricultural mission was sent to the United States a year ago to study the possibility of mechanizing our rice industry in a manner similar to that of the United States.

14. To what extent are such changes the result of a necessity to increase exports?

Our principal export crops before the war were sugar, copra, coconut oil, desiccated coconut, abaca, and tobacco. Before the war (1940), we exported

40,517,898 kilos of desiccated coconut; 177,458,863 kilos of inedible coconut oil; 8,443,294 kilos of edible coconut oil; 341,930,371 kilos of copra; 923,542,586 kilos of centrifugal sugar; 52,931,188 kilos of refined sugar; 12,222,118 kilos of leaf tobacco; 206,251,102 cigars; 136,558,713 cigarettes; and about 1,402,720 bales (126.5 kilos) of unmanufactured abaca, or about 177,400,000 kilos.

In 1945 we exported only about 2,000,000 kilos of copra and about 2,400,000 kilos of abaca, and during the first half of 1946, we exported only around 141,783,000 kilos of copra and about 20,000,000 kilos of abaca. We have not exported sugar and tobacco. To increase, therefore, our production both of the raw materials and of the manufactured products and thereby increasing our exports, we need agricultural and industrial machinery to replace those destroyed during the war.

15. To what extent are such changes the result of a necessity to decrease imports?

Our rice production before the war was about 51,400,000 cavanes of palay (rough rice) and our yearly average rice importation from 1937 to 1941, excluding about 15,000 cavanes exported at the same time was 756,250 cavanes of 56 kilos, or equivalent to about 1,532,500 cavanes of palay. The yearly consumption of milled rice now in the Philippines is about 50,000,000 cavanes, or about 60,000,000 cavanes of palay. Our production was only about 18,000,000 cavanes (36,000,000 cavanes of palay). Hence, a deficit of about 12,000,000 cavanes of 56 kilos, or 24,000,000 cavanes (14 kilos) of palay which we have to import from other countries. Hence, the need for the use of farm machinery for the immediate recovery of the industry to minimize our rice import.

Development of vast potential resources and industrialization of our country, through the introduction of modern equipment and the training of the necessary personnel, would help decrease imports. Such imported items as paper, textiles, fish, vegetables, cocoa, coffee, sugar, edible vegetable oils, etc. could be easily produced or processed locally.

16. To what extent are such changes dependent upon the importation of capital equipment?

In the manufacturing industries, such changes are largely dependent on the importation of capital equipment.

17. To what extent are such changes dependent on imported raw materials?

The proposed changes do not depend on imported raw materials as the Philippines abounds in raw materials, except industrial chemicals. Conversion of raw materials into finished products through the use of imported capital equipment is one of our distinct needs, if industrialization is to be encouraged.

18. What addition to the existing stock of trucks, railroad, water and air transport equipment are required, in order to meet the goals set by the longer range recovery and development programme? To what extent can these additions be met out of domestic production?

Information called for by this question can be furnished only by higher authorities -- those that shape the basic policies of the government. However it can be assumed that it is a basic policy to restore the public utilities to their prewar status to improve the living conditions of the mass of the people; in which case the much needed equipment must have to be imported as they are not manufactured locally. The Philippines is as yet in an agricultural stage of development, and it will take years before heavy industries can be successfully established here.

18 a. What additions are contemplated in construction of roads, bridges, railroads, and waterways and airfields for economic development.

The primary objective of the Republic is to repair prewar damaged roads and bridges, portworks, public buildings (including schools and hospitals), airways, lighthouses, and the government operated railways; that is to say, restore them to their serviceable status before the war. However, in reconstructing devastated Manila, there is a project to build a national capitol with an outlay of some P45,000,000. There is also a project to build a military road connecting San Fernando, La Union province and Batangas, Batangas province, and another project to repair present piers and warehouses in Manila and to build several new ones on the north side of the harbor to provide for future expansion of the volume of trade passing through the port of Manila.

All the foregoing projects will be built from the sum of P240,000,000 to be set aside for said government projects in the Tyding's War Damage Act. The sum of P150,000,000 has already been made available for the military road, the repair of the University of the Philippines, the construction and repair of portworks, construction of the proposed national capitol, and the repair of public schools and hospitals.

New projects of similar magnitude may also be undertaken in naval and military reservations of the United States in the islands, including the construction, improvement and expansion of airways for military use within those bases. It is the United States Government that will finance them.

19. Significant data on the trend of birth and death rates, population shifts, and related factors.

The birth rate in the Philippines appears to have registered no appreciable change, the rate per thousand population in 1940 being 32.28 as compared with 32.83 in 1931. In years between these two periods the variation in the birth rate is insignificant. On the other hand, the death rate per thousand population indicated an appreciable improvement, as the rate dropped from 17.97 per thousand in 1931 to 16.50 in 1940. It is estimated that about 350,000 persons are added annually to the population. (Population as of the Census of 1939 was 16,000,303; estimated as of January 1, 1946 it was 18,846,000)

Prior to the war, there were two classes of population movements in the Philippines; namely, (a) natural current and (b) artificial movement, the latter representing persons transferring to scarcely populated areas under Government auspices for the purpose of settling lands of the public domain. For the period 1931-1939 the average number of homeseekers sent under Government assistance was 2,520. The natural current may be divided into two kinds - migration from rural to rural communities and the drift of rural population toward the cities. No data are available regarding these movements.

The following table shows the occupational distribution of gainful workers in the Philippines:

GAINFUL WORKERS TEN YEARS OLD AND OVER, BY GENERAL OCCUPATION GROUPS AND BY SEX, 1939

Occupation Group	NUMBER			Per cent distribution Both sexes
	Male	Female	Both sexes	
TOTAL	4,219,278	4,247,215	8,466,493	100.0
Agriculture	2,981,551	474,819	3,456,370	40.8
Domestic and personal service	123,508	3,354,576	3,478,084	41.1
Professional service	65,438	37,977	103,415	1.2
Public service (not elsewhere classified) ..	48,984	636	49,620	0.6
Fishing	175,841	4,728	180,569	2.1
Forestry and hunting	24,903	1,917	26,820	0.3
Mining and quarrying	46,625	394	47,019	0.6
Manufacturing & mech. Industries	333,976	267,359	601,335	7.1
Trans. and communication	202,449	1,147	203,596	2.4
Merical	44,904	3,995	48,899	0.6
Te.	171,099	99,667	270,766	3.2

1/ Includes 3,145,763 housewives.

In view of the unsatisfactory conditions in agricultural employments, there is a tendency for rural people to seek work in urban centers. As a result, a considerable proportion of those formerly engaged in agricultural activities may now be found either in trade or in U. S. Army employment.

20. Can the contemplated changes in the prewar production pattern take place with the present labour force, taking into account average working hours?

Whatever changes are contemplated in prewar production pattern, the labour supply is more than adequate to meet the demands of both agriculture and industry for many years to come.

21. To what extent do such changes require the transfer of labour between different branches of activity, particularly between agriculture and industry?

Expansion in agriculture and industry will not be handicapped as far as labor requirement is concerned. Prior to the war, it was the practice of big enterprises to send representatives to recruit laborers in areas where labor was plentiful. With improved system of labor recruitment and better conditions of employment, the labor needs of both agriculture and industry can be easily met.

22. To what extent will such transfers require the increased mechanization of agriculture?

The need for increased mechanization of agriculture is not so much due to lack of manpower on the farm as we have enough of them, but we lack work animals. Before the war, there were about 1,870,000 work animals on farms, 74 per cent of which were carabaos. The number of carabaos left is about 40 per cent below the prewar of about 2,400,000 and our cattle is about 70 per cent below the prewar of about 1,400,000 heads. The number of work animals left after the war is probably around 40 per cent below the prewar population. The transfer of labor between agriculture and industry will not increase very much the need for mechanization of agriculture.

23. To what extent will the development programme require an increase of certain categories of workers, or of managerial or scientific personnel?

As Philippine economy is essentially agricultural, the great bulk of the working people are engaged in agricultural pursuits. At present unskilled labor predominates as mechanization in agriculture is negligible. In 1939 there were 247,146 skilled laborers, most of whom were employed in industrial and commercial enterprises and other non-farming occupations. The number of skilled laborers may have increased since liberation as a result of the training they gained while in the employ of the U.S. Army. In Greater Manila area alone, the U.S. Army was employing some 70,000 skilled workers in August 1945. A large proportion of these probably belonged to the unskilled class before the war, when the total number of skilled workers in Manila was 35,941 only. To meet present and future demands, the necessity of training managerial and scientific personnel, which the country sadly lacks, appears in order. The training of additional skilled workers may likewise be necessary.

24. To what extent is a surplus of labor anticipated over the next few years, and in what categories of workers? Is migration of such labour contemplated, and to what extent?

As already indicated elsewhere in this report, surplus labor especially in the unskilled class will be available to meet future expansion in agriculture and in industry. In 1939, the total number of gainfully employed persons 10 years old and over was 5,320,730, excluding housewives, and the labor supply was 7,304,300, or a surplus of 1,983,580, or 37.03 per cent. Prior to the war, the mobility of labor from island to island presented some difficulties although in centers of population like Luzon, labor mobility was facilitated by the network of good roads and cheap means of transportation. The migration of laborers from one area to another will depend upon the demands of employing enterprises.

25. What volume of imports is required annually for 1946-48 (and, if possible, for a longer period) to fulfill the recovery and development programme?

The present upward trend of imports, the value of which average a monthly value of 45 million pesos, or with an estimated total of 540 million pesos for this year (1946) as compared with 271 million pesos for 1941 and 569 million pesos for 1940, may be the requirement annually to fulfill recovery and development program.

The accompanying table (Table A) of imports shows the comparative value, by commodity group, for the years 1946-48, 1941 and 1940.

26. What volume of commodities can be available annually for export under the recovery and development programme?

There seems to be at present a bright prospect in the exportation of desiccated coconut, copra, copra meal, and abaca, as the United States is apparently quite willing to absorb our available output, and Spain, one of our best markets for tobacco, could be made to renew the export trade. The volume required for desiccated coconut exports so as to meet the 1941 level is about 57 times; copra, 5 times; abaca, 40 times; leaf tobacco, 3 times; and copra meal, 27 times, under the recovery.

The following table shows the quantity of several exported items for the first six months of 1946 compared with the calendar year of 1941:

Commodity	Unit	1946	
		Jan.-June	1941
Copra	Tons	51,880	265,149
Desiccated coconut	"	1,375	57,284
Copra meal or cake	"	294	55,396
Tobacco leaf	"	792	2,014
Abaca	Bale	33,639	1,282,794

27. To what extent are difficulties contemplated in marketing exports in countries which can provide needed imports, or can pay in convertible foreign exchange?

The chief difficulties met with at present in marketing exports to countries which in prewar years provided needed imports are the lack of transportation facilities and the much reduced rate of production caused by the war.

Country	EUROPEAN COUNTRIES			
	1939		1938	
	Exports	Imports	Exports	Imports
Great Britain	₱ 6,625,484	₱ 5,961,760	₱ 6,017,116	₱ 5,432,927
Netherlands	6,517,454	5,907,845	5,082,032	5,833,732
France	3,522,494	1,599,749	3,184,007	2,104,958
Spain	2,085,726	170,483	310,510	160,673
Norway	410,162	172,934	448,543	139,772
Country	ASIATIC COUNTRIES			
	1941		1940	
	Exports	Imports	Exports	Imports
China	₱ 7,520,356	₱ 8,593,210	₱ 3,687,494	₱ 6,211,560
Hongkong	5,953,111	2,481,400	3,719,348	2,047,781
Malaya	1,092,300	370,314	934,982	144,292
Siam	917,347	489,734	388,788	1,483,015

28. What is the expected balance of payments for the years 1946-48, and, if possible, later years?

The expected balance of payments for the years 1946-1948 is shown in the attached table (Table B).

(Part of Answer to question No. 25, page 11.)

TABLE A -VALUES OF PHILIPPINE IMPORTS: 1946, 1941 and 1940

Commodity Group	1946-1948	1941	1940
TOTAL	<u>P540,000,000</u>	P 271,182,780	P 269,462,542
Textile fibers and manufactures..	65,000,000	60,612,038	51,683,568
Metals and manufactures	38,000,000	39,035,470	51,787,768
Electrical machinery and appliances	6,000,000	9,801,476	7,591,327
Vehicles and parts	20,000,000	10,614,482	12,300,960
Non-metallic minerals	24,000,000	29,946,662	32,198,086
Grains and preparations	55,000,000	16,010,420	14,337,679
Paper and manufactures	20,000,000	13,000,712	13,007,952
Dairy products	34,000,000	11,163,634	9,285,511
Chemicals, drugs, dyes & medicines	18,000,000	10,205,974	8,137,901
Rubber and manufactures	5,000,000	7,107,480	5,291,520
Inedible animal products.....	1,000,000	4,557,692	3,225,803
Vegetables & vegetables preparations	9,000,000	4,203,122	4,160,993
Cocoa, coffee and tea	9,000,000	4,008,606	2,710,597
Explosive, fireworks & ammunitions	1,000,000	3,769,480	3,342,456
Fish and fish products	8,000,000	3,270,096	3,045,813
Fruits and preparations	27,000,000	3,059,236	3,302,816
Meat products	3,000,000	2,479,648	2,757,142
Paints, pigments & varnishes	2,000,000	2,069,252	1,941,874
Fertilizer & fertilizing materials	17,000	1,725,348	6,966,119
Sugar, molasses and syrups	3,000,000	1,438,320	1,481,814
Soaps	1,000,000	1,289,470	796,469
Gums, resins, and oils	600,000	934,774	809,017
Wood and manufactures	1,000,000	818,028	912,045
Vegetable oils and fats, edible..	500,000	373,086	507,865
Other edible animal products.....	200,000	140,734	522,268
Nuts and preparations	1,000,000	111,650	104,827
Seeds (except oil seeds) & nursery	100,000	107,778	105,582
Spices	300,000	87,550	73,274
Animals	60,000	60,772	118,098
Animal oils and fats, edible	600,000	38,836	64,774
Cork	200,000	38,360	84,821
All other	176,423,000	29,102,594	26,725,203

29. What minimum amounts of foreign credits will be required annually in 1946-1948 and, if possible, for a longer period, to cover any deficit in the balance of international payments?

With a government reserve of P 670,000,000 in round numbers, the bulk of which is deposited in the United States, and with the Philippine peso pegged to the dollar, the Philippines may not expect any deficit in the balance of international payments this year or even in next fiscal year, provided, of course, that the Philippine Republic does not draw from said reserves to meet huge budgetary deficits estimated to be around P250,000,000 in the national budget for the fiscal year 1946-1947. The Republic, however, is not using its reserves for the purpose, and instead has passed several taxation measures calculated to cut down the reported deficit by about P50,000,000 thus, leaving a possible net deficit of around P200,000,000. It is to meet this expected net deficit that the Government has been pressing its application for loan in the United States, and indications are that the President may even go to the United States to negotiate such loans.

In the 1947-1948 fiscal year, a similar situation may occur, although the several new taxation measures may operate to cut down further the expected deficits as business may be stimulated by war damage payments reported to commence about the latter part of this year. Not until the destroyed industries are restored -- sugar, mining, coconut oil, rope, cigar, etc., will such threat to the ability of the Philippines to meet balances of international payments against her cease to be a serious problem to the new Republic.

In the meantime, as above indicated, a minimum loan of P200,000,000 should be granted annually to the Philippines for the next two years.

Manila, September 27, 1946

(SLL)

true copy;

/s/ Leon Ma. Gonzales
LEON MA. GONZALES
Director of the Census and Statistics

November 19, 1946

(Part of Answer to Question No. 28 page 11)

TABLE B - ESTIMATED BALANCE OF INTERNATIONAL PAYMENTS OF THE PHILIPPINES
1946 - 1948

Credits Items	VALUE (Pesos)			Debit Items	VALUE (Pesos)		
	1946	1947	1948		1946	1947	1948
Exports of Merchandise ..	6,000,000	65,000,000	130,000,000	Imports of Merchandise	590,000,000	590,000,000	590,000,000
Receipts from foreign countries - War damages	-	100,000,000	100,000,000	Freight charges, insurance, etc.	35,000,000	35,000,000	35,000,000
Interest on government investment	1,000,000	1,000,000	1,000,000	Expenses of Filipinos abroad	100,000	100,000	100,000
Remittances of Filipinos in foreign countries ..	13,000,000	13,000,000	13,000,000	Interest on foreign capital in the Philippines	6,000,000	10,000,000	14,000,000
or Civilian tourist expenditures	200,000	200,000	200,000	Philippine government debts to be paid	8,000,000	-	-
Army and Navy expenditures including pensions to veterans	233,000,000	193,000,000	153,000,000	TOTAL DEBITS - - - - -	639,100,000	635,100,000	639,100,000
TOTAL CREDITS -	253,200,000	372,200,000	397,200,000				
BALANCE - -	385,900,000	262,900,000	241,900,000				
	639,100,000	635,100,000	639,100,000		639,100,000	635,100,000	639,100,000

Republic of the Philippines
Office of the President
BUREAU OF THE CENSUS AND STATISTICS, MANILA

November 19, 1946

TO WHOM IT MAY CONCERN:

This is to certify that the attached report dated September 27, 1946 is a true copy of the statement of information furnished by the Bureau of the Census and Statistics, thru the Office of the President, in answer to a questionnaire referred to this Office by the Department of Foreign Affairs, bearing, among other things, on war damages, population, and economic conditions of the Philippines.

(SEAL)

/s/ Leon Ma. Gonzales
Director

Encl.

- - - - -

Office of the President of the Philippines

Republic of the)
Philippines) SS
City of Manila)

(SEAL)

I, EMILIO ABELLO, Chief of the Executive Office do hereby certify that Leon Ma. Gonzales, whose name appears signed to the attached certificate, was at the time of signing the said certificate, Director, Bureau of the Census and Statistics, Manila, Philippines, duly appointed and qualified and was, as such, Director, duly authorized by the laws of the Philippines to sign, the same, and that the full faith and credit are and ought to be given to his official acts; and I further certify that I am well acquainted with his handwriting and verily believe the signature and seal affixed to the said certificate are genuine.

In witness whereof, I have hereunto set my hand at Manila, Philippines, this 20th day of November, A. D., 1946.

/s/ EMILIO ABELLO

Chief of the Executive Office

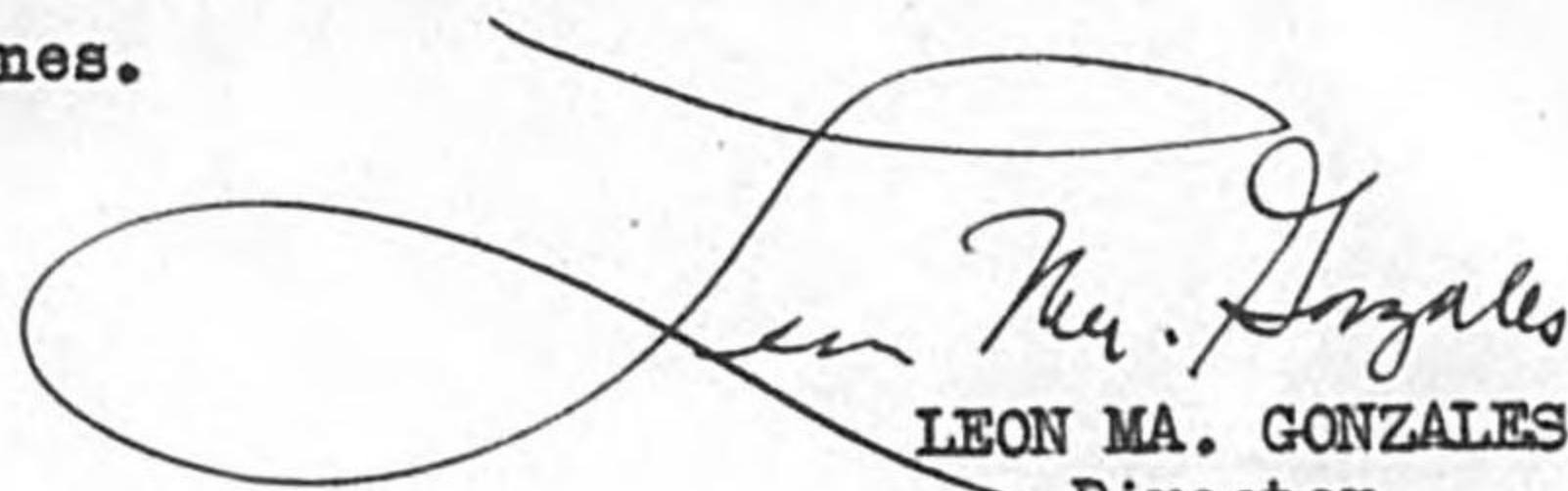
Doc. 2880

REPUBLIC OF THE PHILIPPINES
OFFICE OF THE PRESIDENT
BUREAU OF THE CENSUS AND STATISTICS
MANILA

November 19, 1946

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LEON MA. GONZALES
Director

Encl.

REPUBLIC OF THE PHILIPPINES
CITY OF MANILA

Office of the President of the Philippines

Executive Office

I, EMILIO ABELLO, Chief of the ~~Executive Office of the President of the Philippines~~ Statistical Office, Manila, do hereby certify that Leon Ma. Gonzales, whose name appears signed to the attached certificate, was at the time of signing the said certificate, Director, Bureau of the Census and Statistics, Manila, Philippines, duly appointed and qualified and was, as such Director, duly authorized by the laws of the Philippines to sign the same, and that the full faith and credit are and ought to be given to his official acts; and I FURTHER CERTIFY that I am well acquainted with his handwriting and verily believe the signature and seal affixed to the said certificate are genuine.

IN WITNESS WHEREOF, I have hereunto set my hand at Manila, Philippines, this 20th day of November, A. D. 1946



EMILIO ABELLO

Chief of the Executive Office

Office of the President
BUREAU OF THE CENSUS AND STATISTICS, Manila

I. ANSWERS TO QUESTIONS CONCERNING PRESENT DEGREE OF RECOVERY.

1. Summary of physical destruction and other losses.— The value of damages sustained by the Philippines as a result of the war (based on reports still incomplete) amounts to about ₱2,740,526,649 distributed as follows: real estate improvements, including government buildings, private residential and commercial structures, churches and other religious institutions, ₱539,374,320 or 19.7 per cent; government corporations, ₱81,756,232 or 3.0 per cent; industrial and commercial properties, ₱512,950,454 or 18.7 per cent; agriculture, ₱281,170,790 or 10.3 per cent; public works improvements, excluding damages in the provinces of Agusan, Batanes, Bukidnon, Catanduanes, Cotabato, Palawan and Zamboanga, ₱244,988,081 or 8.9 per cent; personal effects, such as clothes and linen, house furniture, fixtures and utensils, motor cars, jewelry, books, etc, ₱413,778,327 or 15.1 per cent; government offices, exclusive of buildings, ₱125,663,477 or 4.6 per cent; libraries (from reports of 3 public and 4 private libraries in Manila only), ₱5,624,968 or 0.2 per cent; and prewar value of Japanese notes issued in exchange for goods and services, ₱535,220,000 or 19.5 per cent.

The following table gives a summary of the war losses sustained by the Philippines:

ESTIMATED PHILIPPINE WAR DAMAGES (PARTIAL): DEC. 8, 1941 TO JULY 4, 1945
Based on reports received by the B.C.S. up to June 1946.

Item	1941 Value	Percentage of Distribution
Real estate improvements <u>a/</u>	539,374,320 <u>1/</u>	19.7
Government corporations	81,756,232 <u>2/</u>	3.0
Industrial and commercial properties.....	512,950,454	18.7
Public works improvements <u>b/</u>	244,988,081	8.9
Government offices <u>c/</u>	125,663,477 <u>3/</u>	4.6
Agriculture <u>d/</u>	281,170,790	10.3
Value of Japanese military notes issued <u>e/</u> ..	535,220,000	19.5
Personal effects <u>f/</u>	413,778,327	15.1
Libraries <u>g/</u>	5,624,968	0.2
TOTAL	₱2,740,526,649	100.00

Reduced to physical quantities, these losses are represented as follows:

a. Destruction of houses.— About 270,000 private structures were destroyed rendering from 1,500,000 to 2,000,000 persons homeless.

b. Government buildings.— The destruction of about 1,200 government structures has forced the government to occupy private buildings which could otherwise be utilized as dwellings.

c. School buildings.— About 15,000 school buildings were destroyed, as a result of which thousands of children of school age are out of school.

The following table shows the estimated number of structures damaged as a result of war operations in the Philippines:

ESTIMATED NUMBER OF BUILDINGS AND OTHER STRUCTURES DAMAGED
AS A RESULT OF WAR OPERATIONS IN THE PHILIPPINES
December 8, 1941 - July 4, 1945

Items	Number
Public school buildings	15,100
Government offices and other government structures.....	1,200
Private residences	269,950
Business houses	8,800
Private schools, colleges, hospitals & other structures	100
Churches, convents & other religious structures	150
TOTAL	295,300

a/ Govt buildings included. b/ Excluding damages to Agusan, Batanes, Bukidnon, Catanduanes, Cotabato, Palawan and Zamboanga. c/ Does not include buildings; includes only office furniture & fixtures, supplies & materials, records, documents, books, journals, etc. d/ Includes crops, livestock & farm implements only. e/ Estimated prewar value of worthless Japanese notes issued in exchange for goods & services. f/ Clothes, furniture, fixtures & utensils, books, jewelry, cars, etc. g/ As reported by 3 public & 4 private university & college libraries in Manila. 1/ as reported by 831 municipalities and cities. 2/ Does not include buildings. 3/ As reported by 15 provincial, 5 city and 386 municipal governments and 46 bureaus and offices.

d. Damage to agriculture - The following table reflects the damages to farm crops, livestock and poultry and farm implements.

TOTAL QUANTITY OF WAR DAMAGES TO AGRICULTURAL CROPS,
LIVESTOCK AND POULTRY AND FARM IMPLEMENTS IN THE
PHILIPPINES BY ITEM DECEMBER 8, 1941 TO JULY 4, 1945,
DUE TO LOOTING, REQUISITION, FIRE, CONFISCATION, ETC.

Item	Unit	Quantity
TOTAL		
AGRICULTURAL CROPS -		
<u>Rice</u>		
Palay	Cavan	16,401,290
Rice (clean).....	"	2,015,740
<u>Corn</u>		
Corn (shelled).....	Cavan	3,775,180
Corn (ears)	Number	338,607,040
<u>Sugar cane</u>		
Sugar	Kilo	249,069,560
Canes	Ton	5,424,140
Molasses	Liter	10,007,930
Tobacco	Kilo	10,131,460
<u>Coconuts</u>		
Nuts	Number	515,744,010
Copra	Kilo	128,112,070
Oil	Liter	1,803,990
Tuba	"	8,337,040
Abaca	Kilo	118,537,600
Camote	"	126,742,060
Cassava	"	57,572,850
Gabe	"	13,688,490
Mongo	"	2,144,110
Bananas	"	71,489,100
Coffee	"	1,980,910
Cacao	"	355,520
Beans and vegetables	"	19,622,480
Fruits	"	22,746,200
All others	"	8,845,810
LIVESTOCK AND POULTRY -		
Cattle	Number	615,750
Carabaos	"	578,000
Horses	"	100,390
Pigs	"	1,239,700
Goats	"	75,620
Chickens	"	9,236,180
Ducks	"	288,800
<u>Eggs</u>		
Chickens	Number	34,451,930
Ducks	"	1,393,710
FARM IMPLEMENTS -		
Plows	Number	198,780
Harrows	"	113,650
Tractors	"	384
All others	"	414,990
MISCELLANEOUS		
		-

2. Brief summary of the effects of the war on population and manpower.-

The occupation of the Philippines by the enemy brought untold hardship and suffering upon the people. For about three years the inhabitants were on the verge of starvation. Food supply was forcibly appropriated by the enemy, food production was hampered and the livelihood of the people disrupted by war operations. The inevitable demoralization of the population resulting from the savage fight for existence manifested itself markedly even after liberation in increased crimes and social unrest. War mortality was enormous. Based on available figures, it may be estimated at around half a million.

The estimated labor supply for the Philippines, including all persons 10 years old and over who are able to work, follows:

1939 (Census year)	7,304,300
1941	7,720,200
1946	8,672,900

These estimates are based on the assumption that existing labor supply bears the same ratio to population as the labor supply in 1939. The casualties resulting from massacres by the Japanese, the battle for liberation and other war causes may reduce the estimates for 1946 by from 2 to 4 per cent.

3. Effect of war on rate of progress of industrialization and economic development.-

The destruction wrought by war caused a serious setback to the progress of industrialization and economic development. Before the war, Manila and commercial centers were teeming with large factories and industrial plants with all the modern equipment and facilities for turning out high-grade manufactures in commercial quantities. However, the sugar mills, rope factories, cigar and cigarette factories, coconut oil mills, etc., were laid prostrate in the wake of the liberation and unable to produce sorely needed goods. It will take considerable time before production can catch up with the demand both for local consumption and for export. Many of the prewar operators depend mostly on war damage payments for the rebuilding of their business but so far no payments have been made so that the prospects of early recovery of the prewar rate of industrialization and economic development is very dark. Rehabilitation is greatly handicapped by lack of coal and motive power, heavy machinery and perhaps technical guidance.

With 41 out of the 43 sugar centrals destroyed and 73 out of the 148 saw mills totally destroyed, production of sugar and lumber is very insignificant, as compared to prewar production. The same is true with the mining industry. Only copra is recovering rapidly with 45,000 tons shipped to the U.S. in June as compared to 33,000 prewar monthly average. The average for the six months ending June, 1946, was however 23,600 tons.

4. Consumption level of foodstuffs and other consumers goods.-

Rice.-Domestic consumption of rice before the war was 350 grams daily per capita, or a yearly per capita consumption of 2.28 cavanes of cleaned rice (56 kilos to a cavan). On the basis of an estimated population of 18,480,000 in 1946, out of which 69.5 per cent constitute the rice-eating population, a total of 29,283,400 cavanes of cleaned rice would be needed to support the population, as against the 1945-1946 crop of 17,067,140 cavanes of cleaned rice or a deficiency of 12,216,260 cavanes, which have to be supplied partly from imports and partly from rice substitutes, such as corn, cassava, gabe, tugui and other root crops.

Sugar.-Prewar consumption of sugar is estimated at 7 kilos or 15.4 pounds per capita, or a total estimated 1946 consumption of about 142,000 short tons. The estimated 1946-47 output of the 5 sugar centrals in operation is 66,000 short tons. There is, thus, a shortage of 76,000 short tons, which have to be wholly supplied from imports.

Meat.- Meat consumption in Manila before the war was 16 kilos or 35.2 pounds per capita. Because of the excessive postwar price of meat which is practically eight times that of prewar, a large portion of the population has shifted to canned foodstuffs, mostly imported from the United States. In view of present difficulties of collecting statistics on slaughtered animals in the provinces, however, there are now no means of ascertaining actual consumption data. It may be stated that the war had a most disastrous effect on the livestock industry.

Imports for consumption of the following articles may throw more light on consumption levels of various other commodities: (a)

Items	1941 (Kilos)	Per capita (Kilos)	imports 1945 (Kilos)	Per capita im- ports(Kilos)
Grains and preparations	139,330,412	8.30	65,823,548	3.57
Meat and dairy products	20,824,766	1.83	12,480,576	.67
Vegetables and preparations	28,986,842	1.72	6,800,886	.37
	(Sq. yards)	(Sq. yards)	(Sq. yards)	(Sq. yards)
Textiles and manu- factures	167,568,210	9.99	835,108	.045

NOTE: (a) 1941 estimated population16,771,900
1945 " "18,415,100

4a. Present level of production in significant industries as compared with significant prewar years.-

The present level of production as compared with significant prewar years is as follows:

Items	Unit of measure	PRODUCTION	
		Pre-war 1940	Present 1946
Sugar, centrifugal	Short tons	1,044,000	13,000
Lumber	Board feet	340,400,000	150,000,000
Abaca	Bales	1,342,000	237,000
Copra	Tons	738,000	200,000
Coconut oil	Tons	243,000	(Nil)
Cigars	Thousand	331,600	50,000
Electricity	Kwh (thousand)	175,400	50,000
Mines, gold	Pesos	62,700,000	1,000,000

5. Present level of agricultural production compared with prewar.-

Rice.- The area planted for the crop year ending June 30, 1946 was 1,653,820 hectares, or about 21 per cent less than the prewar average of 2,096,720 hectares. The production was 36,134,280 cavanos (44 kilos) of palay (rough rice) or about 30 per cent below the prewar average of 51,401,660 cavanos.

Corn.- The area planted for the crop year ending June 30, 1946 was 522,570 hectares or about 43 per cent less than the prewar average of 911,140 hectares. The production was 5,178,000 cavanos of 58 kilos or about 45 per cent below the prewar average of 9,421,740 cavanos.

Sugar (centrifugal).- The present production is about 11,646,000 kilos, or about 98.82 per cent less than the prewar average of about 990,000,000 kilo. There were 5 centrals that started operation out of 42 before the war. About 3 more are ready to operate this coming milling season. There are at least two more sugar centrals ready to operate but they lack sugar cane to mill.

Abaca.- The production was about 30,000,000 kilos for the crop year ending June 30, 1946, or about 83 per cent less than the prewar average of 177,730,000 kilos.

Copra.- The production for the crop year ending June 30, 1946 was about 200,000,000 kilos or about 70 per cent less than the prewar average of about 675,000,000 kilos.

6. Present serviceable quantity of railroad rolling stock, trucks, air and water transport equipment (ocean-going and inland), as compared with a significant prewar period.-

The total rolling stock of the Manila Railroad Company is 1,905, including 73 locomotives, 67 passenger coaches, 1 rail motor car, 36 express, baggage and caboose cars, and 1,728 freight cars and service cars. As compared with the serviceable rolling stock in 1941, there is a decrease of 29 per cent in the grand total, and of the following percentages in the different types of rolling stock: About 49 per cent for locomotives; about 68 per cent for passenger coaches; over 98 per cent for rail motor cars; 100 per cent for rail motor car trailers (in 1941 there were 100 of them); about 62 per cent for express, baggage and caboose cars; and about 17 per cent for freight cars and service cars.

The Philippine Railway Company which operates lines in Cebu and Panay islands have not as yet submitted figures. Available prewar figures for this company give a total rolling stock of 388, consisting of 16 locomotives, 56 passenger cars and 266 freight cars. The Cities of Iloilo and Cebu were burned by the Japanese and it is more than likely that a large percentage of the rolling stock of the Philippine Railway Company might have been destroyed there.

The tramway transportation system in Manila, an American enterprise that before the war had around 150 electric cars and 300 buses, was entirely wiped out. The only visible assets in Manila are the tramway lines not removed or destroyed by the Japanese.

Before the war, there were two companies that operated scheduled airlines. They are the Philippine Air Transport Company and the Iloilo-Negros Air Express Company. Aside from the foregoing scheduled operators, there were six non-scheduled operators. All of the above scheduled and non-scheduled operators had during the fiscal year 1939-1940 a total of over 20 serviceable passenger and freight planes that carried 16,209 revenue passengers and a total freight of 3,098,271.50 pounds in air mail and air express. As of June 1946, there were a total of 37 commercial airplanes operated by the Far Eastern Air Transportation Company and the Philippine Air Lines for passenger and freight service and both have reported a total revenue passenger of 107,367 and freight consisting of mail and express totalling 7,727,258.30 pounds for the first half of the current year. The statistics indicate considerable progress over prewar commercial airplane operations.

Available prewar statistics on water transportation are those for 1940 when 730 ocean-going vessels with a total net tonnage of 2,755,606 and 3,547 inter-island and bay and river crafts of different categories (steamers, 62; steam launches, 28; motor ships and auxiliary schooners, 98; launches, boats, bancas with motor, 820; scows, lighters, barges, cascos, and bancas, 960; and sailing vessels, 1,515), with a total net tonnage of 154,613.20 were engaged in foreign and interisland and bay and river trade during that year. Postwar statistics on this subject are still being gathered, although it is of common knowledge and observation that water transportation facilities were among the worst hit during the war. The ocean-going vessels which mostly belonged to the belligerents were practically all wiped out, and present ocean-going steamers coming to the Islands are the few survivors and several new American-owned steamers. Ninety (90) per cent of the steamers belong to the United States; the rest belong to the British, Norwegians, Dutch, Danish and Chinese. Practically all the interisland steamers were sunk during the war. A few of the water-crafts of lesser categories, mostly sailing vessels, were able to survive.

As regards motor vehicle transportation, there were registered in 1940 (only complete available record) a total of 20,236 motor trucks and 33,878 automobiles, or a total of 54,134 motor cars and trucks. In 1945, the preliminary registration figures give a total of 8,996 for motor trucks and 3,824 for automobiles, Manila and Rizal excluded, or a total of 12,820. Adding the registration of 12,613 trucks and 6,476 automobiles for Manila and Rizal for the first part of 1946, we get a full total of 31,909 motor car registration in 1945-1946. This full total compared with that of 1940 shows a decrease of over 41 per cent.

7. Estimated attainable level, as compared with prewar output, or industrial and agricultural production.-

a. Damage to agricultural industry during the war may be conservatively estimated at about 33-1/3 per cent of the total value.

- (a) Sugar industry - 43 per cent of sugar centrals and refineries.
- (b) Tobacco industry - 60 per cent of prewar production.
- (c) Abaca industry - 30 per cent of the plantations, excluding damages to stripping machines, sheds, etc., worth more than ₱3,000,000.
- (d) Coconut industry - 50 per cent of the coconut oil and desiccated coconut factories, 40 per cent of copra driers, warehouses and other establishments and 5 per cent of coconut trees.

b. Attainable level of agricultural and industrial production assuming an adequate supply of raw materials and energy, compared with the prewar.

Products	Unit	Prewar production	Attainable level of production
Rice	Cavanes	51,401,660	40,000,000
Corn	"	9,421,740	6,000,000
Sugar -			
Centrifugal.....	Kilos	990,000,000	350,000,000
Muscovado	"	41,000,000	20,000,000
Abaca	"	177,730,000	100,000,000
Tobacco	"	42,000,000	20,000,000
Copra	"	675,000,000	500,000,000
Coconut oil	Tons	343,000	10,000
Lumber	Board feet	340,400,000	100,000,000
Embroideries		₱11,755,000	₱ 1,000,000
Cigars	Thousand	331,600	50,000
Cigarettes	"	3,292,900	1,000,000
Cordage		₱ 3,300,000	₱ 1,000,000
Shoes	Pairs	2,455,600	500,000
Electricity	Kwh	175,400	75,000

8. To what extent has the lack of agricultural and industrial equipment impaired immediate recovery?

In the case of the sugar and tobacco industry, the lack of agricultural and industrial equipment will retard 60 per cent of their immediate recovery. In the case of lowland rice, about 10 per cent and for upland rice and corn, about 30 per cent. In the case of abaca, it will be around 40 per cent, for copra, 20 per cent, and for coconut oil, 50 per cent.

9. To what extent has the lack of raw materials impaired immediate recovery?

The lack of raw materials has not seriously impaired the immediate recovery of industries, with the exception of the sugar industry and to some extent of the abaca industry as almost all the sugar plantations were destroyed and some of the big abaca plantations were partly damaged due to war operations. The scarcity of hides for the shoe and slipper industry and for cannisters for the canning industry also handicaps the rapid recovery of these industries.

However, the key to immediate recovery is the restoration of the plants, heavy machinery and buildings to start sizeable production. The Philippines is endowed with plenty of raw materials so that lack of it is not so much a problem.

10. To what extent has lack of transport facilities impaired immediate recovery?

Immediate recovery is being impeded greatly by a lack of sufficient transportation facilities and this is particularly true in the case of inter-island transportation which has been crippled almost 100 per cent by the war and has affected seriously the shipment of lumber and other building materials as well as of foodstuffs and other necessities of life to the devastated areas. The wide disparity between the living cost in Manila and distant provinces is due largely to the lack of transportation facilities that hinder the flow of commerce to and from the metropolis. But even in overseas commerce, the lack of shipping lines to Europe and parts of Asia has left only the United States as the market for Philippine products which before the war had a much wider outlet, particularly for leaf tobacco, copra, Manila hemp, Manila rope, hides and skins, etc.

11. To what extent has the lack of financial means impaired immediate recovery?

Because of the insufficiency of government revenues, the Government has not been able to undertake any wide-scale reconstruction work. Damaged public buildings, roads, bridges, portworks, railroads, etc., are not as yet repaired pending the receipt of the P240,000,000 share of the Government from the Tydings War Damage Compensation Act.

The same can be said of private industry. Destroyed sugar centrals, tobacco factories, rice mills, lumber mills, coconut oil mills, desiccated coconut factories, rope factories, distilleries, shoe factories, mining works, etc., are still out of operation pending the receipt of substantial capital to rehabilitate them or to supply the much needed capital equipment almost totally destroyed by the war.

II. ANSWERS TO QUESTIONS CONCERNING LONG RANGE RECOVERY AND DEVELOPMENT PROGRAMS.

11a. What is the level of consumption of foodstuffs and other consumers goods and standards of housing, anticipated during the next 18 months, five years or more.

(See answer to question No. 4 concerning the level of consumption of foodstuffs and other consumers goods.) With the enormous destruction of dwelling especially in urban centers, thousands upon thousands of people are housed in temporary structures devoid of the necessary sanitation facilities. It may take 10 to 15 years before prewar standards of housing is restored.

12. Does the production pattern proposed in the country's development program differ materially from the prewar pattern and in what respects?

The production pattern proposed in the country's development will not differ materially from the prewar pattern except in the sugar industry where production may be reduced as a result of the destruction of machinery which was extensively used in this industry before the war. Owing to the destruction of work animals, the use of farm machinery is contemplated in the production of rice, corn, tobacco, root crops and vegetables besides sugar cane.

13. To what extent do the changes proposed in the prewar production pattern take into account the modifications in the economies of other countries?

The production pattern proposed for rice is based on the methods of production in the United States. For this purpose, an agricultural mission was sent to the United States a year ago to study the possibility of mechanizing our rice industry in a manner similar to that of the United States.

14. To what extent are such changes the result of a necessity to increase exports?

Our principal export crops before the war were sugar, copra, coconut oil, desiccated coconut, abaca, and tobacco. Before the war (1940), we exported

40,517,898 kilos of desiccated coconut; 177,458,863 kilos of inedible coconut oil; 8,443,294 kilos of edible coconut oil; 341,930,371 kilos of copra; 923,542,586 kilos of centrifugal sugar; 52,931,188 kilos of refined sugar; 12,222,118 kilos of leaf tobacco; 206,231,102 cigars; 136,558,743 cigarettes; and about 1,402,720 bales (126.5 kilos) of unmanufactured abaca, or about 177,400,000 kilos.

In 1945 we exported only about 2,000,000 kilos of copra and about 2,400,000 kilos of abaca, and during the first half of 1946, we exported only around 141,783,000 kilos of copra and about 20,000,000 kilos of abaca. We have not exported sugar and tobacco. To increase, therefore, our production both of the raw materials and of the manufactured products and thereby increasing our exports, we need agricultural and industrial machinery to replace those destroyed during the war.

15. To what extent are such changes the result of a necessity to decrease imports?

Our rice production before the war was about 51,400,000 cavanes of palay (rough rice) and our yearly average rice importation from 1937 to 1941, excluding about 15,000 cavanes exported at the same time was 756,250 cavanes of 56 kilos, or equivalent to about 1,532,500 cavanes of palay. The yearly consumption of milled rice now in the Philippines is about 30,000,000 cavanes, or about 60,000,000 cavanes of palay. Our production was only about 18,000,000 cavanes (36,000,000 cavanes of palay). Hence, a deficit of about 12,000,000 cavanes of 56 kilos, or 24,000,000 cavanes (14 kilos) of palay which we have to import from other countries. Hence, the need for the use of farm machinery for the immediate recovery of the industry to minimize our rice import.

Development of vast potential resources and industrialization of our country, through the introduction of modern equipment and the training of the necessary personnel, would help decrease imports. Such imported items as paper, textiles, fish, vegetables, cocoa, coffee, sugar, edible vegetable oils, etc. could be easily produced or processed locally.

16. To what extent are such changes dependent upon the importation of capital equipment?

In the manufacturing industries, such changes are largely dependent on the importation of capital equipment.

17. To what extent are such changes dependent on imported raw materials?

The proposed changes do not depend on imported raw materials as the Philippines abounds in raw materials, except industrial chemicals. Conversion of raw materials into finished products through the use of imported capital equipment is one of our distinct needs, if industrialization is to be encouraged.

18. What addition to the existing stock of trucks, railroad, water and air transport equipment are required, in order to meet the goals set by the longer range recovery and development programme? To what extent can these additions be met out of domestic production?

Information called for by this question can be furnished only by higher authorities -- those that shape the basic policies of the government. However it can be assumed that it is a basic policy to restore the public utilities to their prewar status to improve the living conditions of the mass of the people; in which case the much needed equipment must have to be imported as they are not manufactured locally. The Philippines is as yet in an agricultural stage of development, and it will take years before heavy industries can be successfully established here.

18 a. What additions are contemplated in construction of roads, bridges, railroads, and waterways and airfields for economic development.

The primary objective of the Republic is to repair prewar damaged roads and bridges, portworks, public buildings (including schools and hospitals), airways, lighthouses, and the government operated railways; that is to say, restore them to their serviceable status before the war. However, in reconstructing devastated Manila, there is a project to build a national capitol with an outlay of some P45,000,000. There is also a project to build a military road connecting San Fernando, La Union province and Batangas, Batangas province, and another project to repair present piers and warehouses in Manila and to build several new ones on the north side of the harbor to provide for future expansion of the volume of trade passing through the port of Manila.

All the foregoing projects will be built from the sum of P240,000,000 to be set aside for said government projects in the Tyding's War Damage Act. The sum of P150,000,000 has already been made available for the military road, the repair of the University of the Philippines, the construction and repair of portworks, construction of the proposed national capitol, and the repair of public schools and hospitals.

New projects of similar magnitude may also be undertaken in naval and military reservations of the United States in the islands, including the construction, improvement and expansion of airways for military use within those bases. It is the United States Government that will finance them.

19. Significant data on the trend of birth and death rates, population shifts, and related factors.

The birth rate in the Philippines appears to have registered no appreciable change, the rate per thousand population in 1940 being 32.28 as compared with 32.83 in 1931. In years between these two periods the variation in the birth rate is insignificant. On the other hand, the death rate per thousand population indicated an appreciable improvement, as the rate dropped from 17.97 per thousand in 1931 to 16.50 in 1940. It is estimated that about 350,000 persons are added annually to the population. (Population as of the Census of 1939 was 16,000,303; estimated as of January 1, 1946 it was 18,846,000)

Prior to the war, there were two classes of population movements in the Philippines; namely, (a) natural current and (b) artificial movement, the latter representing persons transferring to scarcely populated areas under Government auspices for the purpose of settling lands of the public domain. For the period 1931-1939 the average number of homeseekers sent under Government assistance was 2,520. The natural current may be divided into two kinds - migration from rural to rural communities and the drift of rural population toward the cities. No data are available regarding these movements.

The following table shows the occupational distribution of gainful workers in the Philippines:

GAINFUL WORKERS TEN YEARS OLD AND OVER, BY GENERAL OCCUPATION GROUPS AND BY SEX: 1939

Occupation Group	NUMBER			Per cent distribution
	Male	Female	Both sexes	
TOTAL	4,219,278	4,247,215	8,466,493	100.0
Agriculture	2,981,551	474,819	3,456,370	40.8
Domestic and personal service.	123,508	3,354,576	3,478,084 1/	41.1
Professional service	65,438	37,977	103,415	1.2
Public service (not elsewhere classified)..	48,984	636	49,620	0.6
Fishing	175,841	4,728	180,569	2.1
Forestry and hunting	24,903	1,917	26,820	0.3
Mining and quarrying	46,625	394	47,019	0.6
Manufacturing & mech. Industries	333,976	267,359	601,335	7.1
Trans. and communication	202,449	1,147	203,596	2.4
Clerical	44,904	3,955	48,899	0.6
Tr.	171,099	99,667	270,766	3.2

1/ Includes 3,145,763 housewives.

In view of the unsatisfactory conditions in agricultural employments, there is a tendency for rural people to seek work in urban centers. As a result, a considerable proportion of those formerly engaged in agricultural activities may now be found either in trade or in U. S. Army employment.

20. Can the contemplated changes in the prewar production pattern take place with the present labour force, taking into account average working hours?

Whatever changes are contemplated in prewar production pattern, the labour supply is more than adequate to meet the demands of both agriculture and industry for many years to come.

21. To what extent do such changes require the transfer of labour between different branches of activity, particularly between agriculture and industry?

Expansion in agriculture and industry will not be handicapped as far as labor requirement is concerned. Prior to the war, it was the practice of big enterprises to send representatives to recruit laborers in areas where labor was plentiful. With improved system of labor recruitment and better conditions of employment, the labor needs of both agriculture and industry can be easily met.

22. To what extent will such transfers require the increased mechanization of agriculture?

The need for increased mechanization of agriculture is not so much due to lack of manpower on the farm as we have enough of them, but we lack work animals. Before the war, there were about 1,870,000 work animals on farms, 74 per cent of which were carabaos. The number of carabaos left is about 40 per cent below the prewar of about 2,400,000 and our cattle is about 70 per cent below the prewar of about 1,400,000 heads. The number of work animals left after the war is probably around 40 per cent below the prewar population. The transfer of labor between agriculture and industry will not increase very much the need for mechanization of agriculture.

23. To what extent will the development programs require an increase of certain categories of workers, or of managerial or scientific personnel?

As Philippine economy is essentially agricultural, the great bulk of the working people are engaged in agricultural pursuits. At present unskilled labor predominates as mechanization in agriculture is negligible. In 1939 there were 247,146 skilled laborers, most of whom were employed in industrial and commercial enterprises and other non-farming occupations. The number of skilled laborers may have increased since liberation as a result of the training they gained while in the employ of the U.S. Army. In Greater Manila area alone, the U.S. Army was employing some 70,000 skilled workers in August 1945. A large proportion of these probably belonged to the unskilled class before the war, when the total number of skilled workers in Manila was 35,941 only. To meet present and future demands, the necessity of training managerial and scientific personnel, which the country sadly lacks, appears in order. The training of additional skilled workers may likewise be necessary.

24. To what extent is a surplus of labor anticipated over the next few years, and in what categories of workers? Is migration of such labour contemplated, and to what extent?

As already indicated elsewhere in this report, surplus labor especially in the unskilled class will be available to meet future expansion in agriculture and in industry. In 1939, the total number of gainfully employed persons 10 years old and over was 5,320,730, excluding housewives, and the labor supply was 7,304,300, or a surplus of 1,983,560, or 37.03 per cent. Prior to the war, the mobility of labor from island to island presented some difficulties although in centers of population like Luzon, labor mobility was facilitated by the network of good roads and cheap means of transportation. The migration of laborers from one area to another will depend upon the demands of employing enterprises.

25. What volume of imports is required annually for 1946-48 (and, if possible, for a longer period) to fulfill the recovery and development programme?

The present upward trend of imports, the value of which average a monthly value of 45 million pesos, or with an estimated total of 540 million pesos for this year (1946) as compared with 271 million pesos for 1941 and 569 million pesos for 1940, may be the requirement annually to fulfill recovery and development program.

The accompanying table (Table A) of imports shows the comparative value, by commodity group, for the years 1946-48, 1941 and 1940.

26. What volume of commodities can be available annually for export under the recovery and development programme?

There seems to be at present a bright prospect in the exportation of desiccated coconut, copra, copra meal, and abaca, as the United States is apparently quite willing to absorb our available output, and Spain, one of our best markets for tobacco, could be made to renew the export trade. The volume required for desiccated coconut exports so as to meet the 1941 level is about 57 times; copra, 5 times; abaca, 40 times; leaf tobacco, 3 times; and copra meal, 27 times, under the recovery.

The following table shows the quantity of several exported items for the first six months of 1946 compared with the calendar year of 1941:

Commodity	Unit	1946		1941
		Jan.-June		
Copra	Tons	51,880		265,149
Desiccated coconut	"	1,375		57,284
Copra meal or cake	"	294		55,396
Tobacco leaf	"	792		2,014
Abaca	Bale	33,639		1,282,794

27. To what extent are difficulties contemplated in marketing exports in countries which can provide needed imports, or can pay in convertible foreign exchange?

The chief difficulties met with at present in marketing exports to countries which in prewar years provided needed imports are the lack of transportation facilities and the much reduced rate of production caused by the war.

Country	EUROPEAN COUNTRIES		1938	
	1939 Exports	Imports	Exports	Imports
Great Britain	₱ 6,625,484	₱ 5,961,760	₱ 6,017,116	₱ 5,432,927
Netherlands	6,517,454	5,907,845	5,082,032	5,833,732
France	3,522,494	1,599,749	3,184,007	2,104,958
Spain	2,085,726	170,483	310,510	160,673
Norway	410,162	172,934	448,543	139,772
Country	ASIATIC COUNTRIES		1940	
	1941 Exports	Imports	Exports	Imports
China	₱ 7,520,356	₱ 8,593,210	₱ 3,687,494	₱ 6,211,560
Hongkong	5,953,111	2,481,400	3,719,348	2,047,781
Malaya	1,092,300	370,314	934,982	144,292
Siam	917,347	489,734	388,788	1,483,015

28. What is the expected balance of payments for the years 1946-48, and, if possible, later years?

The expected balance of payments for the years 1946-1948 is shown in the attached table (Table B).

(Part of Answer to question No. 25, page 11.)

TABLE A -VALUES OF PHILIPPINE IMPORTS: 1946, 1941 and 1940

Commodity Group	1946-1948	1941	1940
TOTAL	<u>P540,000,000</u>	P 271,182,780	P 269,462,542
Textile fibers and manufactures..	65,000,000	60,612,038	51,683,568
Metals and manufactures	38,000,000	39,035,470	51,787,768
Electrical machinery and appliances	6,000,000	9,801,476	7,591,327
Vehicles and parts	20,000,000	10,614,482	12,300,960
Non-metallic minerals	24,000,000	29,946,662	32,198,086
Grains and preparations	55,000,000	16,010,420	14,337,679
Paper and manufactures	20,000,000	13,000,712	13,007,952
Dairy products	34,000,000	11,163,634	9,285,511
Chemicals, drugs, dyes & medicines	18,000,000	10,205,974	8,137,901
Rubber and manufactures	5,000,000	7,107,480	5,291,520
Inedible animal products.....	1,000,000	4,557,692	3,225,803
Vegetables & vegetables preparational	9,000,000	4,203,122	4,160,993
Cocoa, coffee and tea	9,000,000	4,008,606	2,710,597
Explosive, fireworks & ammunitions	1,000,000	3,769,480	3,342,456
Fish and fish products	8,000,000	3,270,096	3,045,813
Fruits and preparations	27,000,000	3,059,236	3,302,816
Meat products	3,000,000	2,479,648	2,757,142
Paints, pigments & varnishes	2,000,000	2,069,252	1,941,874
Fertilizer & fertilizing materials	17,000	1,725,348	6,966,119
Sugar, molasses and syrups	3,000,000	1,438,320	1,481,814
Soaps	1,000,000	1,289,470	796,469
Gums, resins, and oils	600,000	934,774	809,017
Wood and manufactures	1,000,000	818,028	912,045
Vegetable oils and fats, edible..	500,000	373,086	507,865
Other edible animal products.....	200,000	140,734	522,868
Nuts and preparations	1,000,000	111,650	124,827
Seeds (except oil seeds) & nursery	atk.100,000	107,778	105,552
Spices	300,000	87,550	73,274
Animals	60,000	60,772	118,098
Animal oils and fats, edible	600,000	38,836	64,774
Cork	200,000	38,360	84,821
All other	176,423,000	29,102,594	26,725,203

September 27, 1946

(21)

29. What minimum amounts of foreign credits will be required annually in 1946-1948 and, if possible, for a longer period, to cover any deficit in the balance of international payments?

With a government reserve of P 670,000,000 in round numbers, the bulk of which is deposited in the United States, and with the Philippine peso pegged to the dollar, the Philippines may not expect any deficit in the balance of international payments this year or even in next fiscal year, provided, of course, that the Philippine Republic does not draw from said reserves to meet huge budgetary deficits estimated to be around P250,000,000 in the national budget for the fiscal year 1946-1947. The Republic, however, is not using its reserves for the purpose, and instead has passed several taxation measures calculated to cut down the reported deficit by about P50,000,000 thus, leaving a possible net deficit of around P200,000,000. It is to meet this expected net deficit that the Government has been pressing its application for loan in the United States, and indications are that the President may even go to the United States to negotiate such loans.

In the 1947-1948 fiscal year, a similar situation may occur, although the several new taxation measures may operate to cut down further the expected deficits as business may be stimulated by war damage payments reported to commence about the latter part of this year. Not until the destroyed industries are restored -- sugar, mining, coconut oil, rope, cigar, etc., will such threat to the ability of the Philippines to meet balances of international payments against her cease to be a serious problem to the new Republic.

In the meantime, as above indicated, a minimum loan of P200,000,000 should be granted annually to the Philippines for the next two years.

Manila, September 27, 1946

(SELL)

true copy;

/s/ Leon Ma. Gonzales

LEON MA. GONZALES

Director of the Census and Statistics

November 19, 1946

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LEON MA. GONZALES

Director of the Census and Statistics

Republic of the Philippines
Office of the President
BUREAU OF THE CENSUS AND STATISTICS, MANILA

November 19, 1946

TO WHOM IT MAY CONCERN:

This is to certify that the attached report dated September 27, 1946 is a true copy of the statement of information furnished by the Bureau of the Census and Statistics, thru the Office of the President, in answer to a questionnaire referred to this Office by the Department of Foreign Affairs, bearing, among other things, on war damages, population, and economic conditions of the Philippines.

/s/ Leon Ma. Gonzales
Director

(SEAL)

Encl.

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Office of the President of the Philippines

Republic of the)
Philippines) SS
City of Manila)

(SEAL)

I, EMILIO ABELLO, Chief of the Executive Office do hereby certify that Leon Ma. Gonzales, whose name appears signed to the attached certificate, was at the time of signing the said certificate, Director, Bureau of the Census and Statistics, Manila, Philippines, duly appointed and qualified and was, as such, Director, duly authorized by the laws of the Philippines to sign, the same, and that the full faith and credit are and ought to be given to his official acts; and I further certify that I am well acquainted with his handwriting and verily believe the signature and seal affixed to the said certificate are genuine.

In witness whereof, I have hereunto set my hand at Manila, Philippines, this 20th day of November, A. D., 1946.

/s/ EMILIO ABELLO

Chief of the Executive Office

(Part of Answer to Question No. 28 page 11)

TABLE B - ESTIMATED BALANCE OF INTERNATIONAL PAYMENTS OF THE PHILIPPINES
1946 - 1948

Credits Items	VALUE (Pesos)			Debit Items	VALUE (Pesos)		
	1946	1947	1948		1946	1947	1948
Exports of Merchandise ..	6,000,000	65,000,000	130,000,000	Imports of Merchandise	590,000,000	590,000,000	590,000,000
Receipts from foreign countries - War damages	-	100,000,000	100,000,000	Freight charges, insurance, etc.	35,000,000	35,000,000	35,000,000
Interest on government investment	1,000,000	1,000,000	1,000,000	Expenses of Filipinos abroad	100,000	100,000	100,000
Remittances of Filipinos in foreign countries ...	13,000,000	13,000,000	13,000,000	Interest on foreign capital in the Philippines	6,000,000	10,000,000	14,000,000
or Civilian tourist expenditures	200,000	200,000	200,000	Philippine government debts to be paid	8,000,000	-	-
Army and Navy expenditures including pensions to veterans	233,000,000	193,000,000	153,000,000	TOTAL DEBITS - - - - -	639,100,000	635,100,000	639,100,000
TOTAL CREDITS -	253,200,000	372,200,000	397,200,000				
BALANCE -	385,900,000	262,900,000	241,900,000				
	639,100,000	635,100,000	639,100,000		639,100,000	635,100,000	639,100,000

Republic of the Philippines
Office of the President
BUREAU OF THE CENSUS AND STATISTICS, MANILA

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City of Manila)

(SEAL)

I, EMILIO ABELLO, Chief of the Executive Office do hereby certify that Leon Ma. Gonzales, whose name appears signed to the attached certificate, was at the time of signing the said certificate, Director, Bureau of the Census and Statistics, Manila, Philippines, duly appointed and qualified and was, as such, Director, duly authorized by the laws of the Philippines to sign, the same, and that the full faith and credit are and ought to be given to his official acts; and I further certify that I am well acquainted with his handwriting and verily believe the signature and seal affixed to the said certificate are genuine.

In witness whereof, I have hereunto set my hand at Manila, Philippines, this 20th day of November, A. D., 1946.

/s/ EMILIO ABELLO

Chief of the Executive Office

① Doc-2880 Evid.

Folder 3

(91)

29. What minimum amounts of foreign credits will be required annually in 1946-1948 and, if possible, for a longer period, to cover any deficit in the balance of international payments?

With a government reserve of P 670,000,000 in round numbers, the bulk of which is deposited in the United States, and with the Philippine peso pegged to the dollar, the Philippines may not expect any deficit in the balance of international payments this year or even in next fiscal year, provided, of course, that the Philippine Republic does not draw from said reserves to meet huge budgetary deficits estimated to be around P250,000,000 in the national budget for the fiscal year 1946-1947. The Republic, however, is not using its reserves for the purpose, and instead has passed several taxation measures calculated to cut down the reported deficit by about P50,000,000 thus, leaving a possible net deficit of around P200,000,000. It is to meet this expected net deficit that the Government has been pressing its application for loan in the United States, and indications are that the President may even go to the United States to negotiate such loans.

In the 1947-1948 fiscal year, a similar situation may occur, although the several new taxation measures may operate to cut down further the expected deficits as business may be stimulated by war damage payments reported to commence about the latter part of this year. Not until the destroyed industries are restored -- sugar, mining, coconut oil, rope, cigar, etc., will such threat to the ability of the Philippines to meet balances of international payments against her cease to be a serious problem to the new Republic.

In the meantime, as above indicated, a minimum loan of P200,000,000 should be granted annually to the Philippines for the next two years.

Manila, September 27, 1946

(SELL)

true copy;

/s/ Leon Ma. Gonzales
LEON MA. GONZALES
Director of the Census and Statistics

November 19, 1946

利用し得る個人建築物ヲ占有する者ニ余儀ナクセヨトス。

ハ校舍約一万五千ノ校舍ガ破壊サレソノ結果何方何ナトイフ学齡兒童ガ学校ヘ
行クコトガ出来ナイデキル。

次表ハフリッピン^作ニ戦ハ結果破壊サレタル建造物ノ見積數ヲ示ス。

フリッピン^作ニ戦ハ結果破壊セタル家屋^{建築物及}ソノ他ノ建造物見積數

一九四二年十月八日——一九四五午七月四日

項目

數

公立学校々金

一五、一〇〇

官廳ソノ他ノ政府建造物

一、二〇〇

個人住宅

二六、九九五〇

商家

事業場

一、一〇〇

私立学校、大学、病院、その他、建造物

100

教会、修道院、その他、宗教建造物

150

総計

295,300

(1) 政府建築物ヲ含ム。(2) アグサシ、バッテリー、ボキッド、ナシ、カタシ、テ、エ、イン、シ、コ、タ

ハ、ト、ハラ、ワ、ン、シ、及、サ、ホ、ン、ガ、ニ、科、ス、ル、損、害、ヲ、除、ク。(1) 建築物ヲ含ム。事業場、家具、及、造作

補給品、及、資材、記録、文書、書籍、^{雑誌}等、ノ、ミ、ヲ、含、ム。(2) 作物、家畜、及、農具、ノ、ミ、ヲ、含、ム。

及、ビ、^{事務}代、償

(3) 物、次、買、購、入、及、労、働、支、拂、用、ト、シ、テ、差、行、サ、レ、タ、ル、其、他、價、値、ノ、日、本、紙、幣、ノ、戦、前、評、價

格

什、器

類。(1) 衣類、家財、道具、及、造作、果、中、具、書籍、宝、石、自、動、車、等。(2) コ、ウ、ニ、於、ケ、ル、公、共

図書館、私立図書館、及、大学図書館、ヨリ、報告、ス、ル。(3) 八、三、一、都、市、町、ヨリ、報告、ス、ル

見。(4) 建築物ヲ含ム。(5) 十五州、五市、及、三、八、六、町、役、所、及、四、六、官、署、ヨリ、報告、ス、ル。

「ミラ」国勢調査統計局長事務所

Translated by K. Kawai
Checked by I. IWANAGA

一現在復興程度ニ就テ用金七三対スル回答

（別表）

（一）物質的破壊及シテ他損失ノ要約。 概ブリッピン人ガ戦争ノ害ヲ所ト見做

結果

認

（二）物價的破壊及シテ他損失ノ要約。 概現在未だ完全テオイ報告基ケバ、以下ニ記シテガ、統計約

（備考）

分類

（三）五三六、六四九パーセントニ達スルモオハ、政府建築物個人住宅用及商用建築物

教会ソノ他ノ宗教施設ヲ含ム不動産ノ改修後、五三九、三七四、三三〇パーセント

一九七パーセント、~~官公署~~官公署ノ固体八、七五六、三三三パーセント、工業及商業

次貝産五三、九五五、四四〇パーセント即チ一八、七パーセント、農業二八、一七〇、七九〇パーセント即チ一〇、三

パーセント、フアクリサン、ハティンズ、バキッドナシ、カタシテエインズ、ハカタバトウ、バラタン及

「ガムボーンガ」地区ニ於ケル損害ヲ除イタル公共施設等物改修二四四、九八、〇八一

パーセント、衣類、リンネル製履具、家財道具、造作類及器具類

自動車宝石書籍等ノ如キ個人動産四三七八・三ニセパン即チ一五一パーセント、建築物ヲ

除イタ官廳ニ五、六、六、三、四、七、セパン即チ四六パーセント、図書館(分ラテニ於ケル公共圖書

館ニ個人田舎館四カラノ報告マシ)五六二四九六八セパン即チ三〇・ニパーセント、物資購入ノ勞賃支

代償トシテ

拂上ル事ヲ行セシム日本紙幣ヲ戰前價額五三三〇、〇〇〇セパン即チ一九五パーセント。

報

大表ハソソリツピン人等ノ認メ戰中損失ノ概要ヲ示スモノデアル。

ラツル

ソソリツピン戦中火

見積額(部分的)一九四五年十月ヨリ一九四五年七月ヨリ迄。

一九四六年六回迄三回勢調査統計局ガ送附シタル諸報告基テ。

項目

一九四五年當時評價額

全体計スル百分比

不動産修繕

五三九、三七四、三三〇

一九七

官廳及団体

八、七五六、三三三

三・〇

業及商業所有資産

五二、九五〇、四五四

一八七

公共設施修繕(四)

二四九八〇八一 八九

官廳(一)

一二五、六六、四七七(三) 四・六

農業(二)

二八一七〇、七九〇 一〇・三

莞券日本軍票評價額(木)

五三、五二二〇、〇〇〇 九五

動産(二)

四三、七七八、三二七 一五・一

圖書館(一)

五、六二四、九六八 〇・二

統計

二、七四〇、五三六、六四九(一) 一〇〇・〇〇

物質重量換算又ハ(右) 損失八次ノヤキナル 如ク表示サレ

ノ家屋ノ破壊。約二十七万ノ個人建築物が破壊サレ、百五十万乃至二百五十万ノ結果

ノ者が家ヲ失フ也

且政府建築物。約千二百ノ政府建築物が破壊サレ、千六百ノ政府八

(己) 己

書表才二八八。

勘定一

二九、口降支拂残高不足ヲ補フ爲ニ、一九四六年ヨリ

一九四八迄、若シ可成場合ハソレヨリモ長期ニ渡リテ、

借入金

毎年、必要ナル外債ノ最上限度ノ額如何、

概算 六七〇、〇〇〇、〇〇〇 政府豫備金、其ノ大部分ハ

合衆口ニ預金ニアルモノナルガ、ヲ以テ、又、フリフセン

弗ニ安定セラルルニヨリ、フリフセンハ本年會計年度又

ハ来年度ニ於イテモ、口降支拂残高ニ不足ヲ来サヌモノト

期待サレル、但シ右ニツイテハ勿論、フリフセンニ共利口ハ、

一九四六年一、一九四七年會計年度ノ口家豫算ニ於ケル概算

約 二五〇、〇〇〇、〇〇〇 僅大ナル豫算ニ関スル不足額ヲ

三十三頁
1946-48
Budget of Japan

支拂ノ爲ニ、右豫備金ヨリ手形ヲ振り出サナイ事ヲ條件トスル。併

シテ、共利口ハ該目的ノ爲ニ、其ノ豫備金ヲ使^{ハナイ事ニシテ居ル}中^ハ居^ルナリ。

其ノ代リ、報告セラレタ不足額ヲ約五〇、〇〇〇、〇〇〇^〇ソ^レノ削減

シ、豫想正味不足額ヲ約二〇〇、〇〇〇、〇〇〇^〇トスル^{〇〇〇}存^ニ算定

トシ、右個ノ課税方法が通過シタ。政府が合衆口ニ於テ

借入^ノ 貸附^〇申請ヲ急イデ居ルハ、此ノ豫想^ノ正味不足^ノ支拂ハン

カ^ノ爲^テアル。諸般ノ事情ヨリ視レバ、大統領が右ノ借入^金 貸附

交渉ノ爲ニ合衆口ニ行ク事サハアルカモシレナイ。

本年後半期頃ヨリ開始サレルト傳ヘラレル。戦争

損害支拂ニ依^テテ^テ済^ニナルデアラウカラ、^酒新^シイ

(5)

課税方法ハ、予想不足額ヲ更ニ削減スルヤウナ結果ヲ生

ズルテアラウガ、一九四七—一九四八会計年度ニハ、同ジ様ナ情^状

カ起ルキトモナラシムル。破壊サレタ産業——砂糖、鑛業、

椰子油、^{世に産}綢、^{世に産}煙草等。——ガ回復サレルニ至ラズニテ、^{始メテ}フィリッピン、^{世に産}ガン

口際支拂^{不足勘定}状高ヲ支拂フ能力ニ付スル如キ、^{今後}脅威ガ、コノ

新^{今後}トイセ、和口ニトフテノ重大問題デ無クナルノデアアル。

不取敢
ソレヲ示ハ、右ニ述ベタル如ク、^{今後}兼テ二年間、フィリッピン

ニ付シテ、毎年、最少限度、二〇〇、〇〇〇、〇〇〇^{〇〇〇}マソノ貸付ガ兵ハラ

レルベキデアアル。

一九四六年、九月二十七日、マニラ

(印)

(6)

真正ナル寫本

口勢調査統計局長

~~署名~~

「~~」~~オニ

Ma

フニザレス

「~~」~~オニ

Ma

カニザレス

一九四六年十一月十九日

(7)

Office of the President
BUREAU OF THE CENSUS AND STATISTICS, Manila

I. ANSWERS TO QUESTIONS CONCERNING PRESENT DEGREE OF RECOVERY.

1. Summary of physical destruction and other losses.— The value of damages sustained by the Philippines as a result of the war (based on reports still incomplete) amounts to about ₱2,740,526,649 distributed as follows: real estate improvements, including government buildings, private residential and commercial structures, churches and other religious institutions, ₱539,374,320 or 19.7 per cent; government corporations, ₱81,756,232 or 3.0 per cent; industrial and commercial properties, ₱512,950,454 or 18.7 per cent; agriculture, ₱281,170,790 or 10.3 per cent; public works improvements, excluding damages in the provinces of Agusan, Batanes, Bukidnon, Catanduanes, Cotabato, Palawan and Zamboanga, ₱244,988,081 or 8.9 per cent; personal effects, such as clothes and linen, house furniture, fixtures and utensils, motor cars, jewelry, books, etc., ₱413,778,327 or 15.1 per cent; government offices, exclusive of buildings, ₱125,663,477 or 4.6 per cent; libraries (from reports of 3 public and 4 private libraries in Manila only), ₱5,624,968 or 0.2 per cent; and prewar value of Japanese notes issued in exchange for goods and services, ₱535,220,000 or 19.5 per cent.

The following table gives a summary of the war losses sustained by the Philippines:

ESTIMATED PHILIPPINE WAR DAMAGES (PARTIAL): DEC. 8, 1941 TO JULY 4, 1945
Based on reports received by the E.C.S. up to June 1946.

Item	1941 Value	Percentage of Distribution
Real estate improvements <u>a/</u>	539,374,320 <u>1/</u>	19.7
Government corporations	81,756,232 <u>2/</u>	3.0
Industrial and commercial properties.....	512,950,454	18.7
Public works improvements <u>b/</u>	244,988,081	8.9
Government offices <u>c/</u>	125,663,477 <u>3/</u>	4.6
Agriculture <u>d/</u>	281,170,790	10.3
Value of Japanese military notes issued <u>e/</u> ..	535,220,000	19.5
Personal effects <u>f/</u>	413,778,327	15.1
Libraries <u>g/</u>	5,624,968	0.2
TOTAL	₱2,740,526,649	100.00

Reduced to physical quantities, these losses are represented as follows:

a. Destruction of houses.— About 270,000 private structures were destroyed rendering from 1,500,000 to 2,000,000 persons homeless.

b. Government buildings.— The destruction of about 1,200 government structures has forced the government to occupy private buildings which could otherwise be utilized as dwellings.

c. School buildings.— About 15,000 school buildings were destroyed, as a result of which thousands of children of school age are out of school.

The following table shows the estimated number of structures damaged as a result of war operations in the Philippines:

ESTIMATED NUMBER OF BUILDINGS AND OTHER STRUCTURES DAMAGED
AS A RESULT OF WAR OPERATIONS IN THE PHILIPPINES
December 8, 1941 - July 4, 1945

Items	Number
Public school buildings	15,100
Government offices and other government structures.....	1,200
Private residences	269,950
Business houses	8,800
Private schools, colleges, hospitals & other structures	100
Churches, convents & other religious structures	150
TOTAL	295,300

a/ Govt buildings included. b/ Excluding damages to Agusan, Batanes, Bukidnon, Catanduanes, Cotabato, Palawan and Zamboanga. c/ Does not include buildings; includes only office furniture & fixtures, supplies & materials, records, documents, books, journals, etc. d/ Includes crops, livestock & farm implements only e/ Estimated prewar value of worthless Japanese notes issued in exchange for goods & services. f/ Clothes, furniture, fixtures & utensils, books, jewelry, cars, etc. g/ As reported by 3 public & 4 private university & college libraries in Manila. 1/ As reported by 831 municipalities and cities. 2/ Does not include buildings. 3/ As reported by 15 provincial, 5 city and 386 municipal governments and 46 bureaus and offices.

d. Damage to agriculture - The following table reflects the damages to farm crops, livestock and poultry and farm implements.

TOTAL QUANTITY OF WAR DAMAGES TO AGRICULTURAL CROPS,
LIVESTOCK AND POULTRY AND FARM IMPLEMENTS IN THE
PHILIPPINES BY ITEM DECEMBER 8, 1941 TO JULY 4, 1945,
DUE TO LOOTING, REQUISITION, FIRE, CONFISCATION, ETC.

Item	Unit	Quantity
T O T A L		
AGRICULTURAL CROPS -		
<u>Rice</u>		
Palay	Cavan	16,401,290
Rice (clean).....	"	2,015,740
<u>Corn</u>		
Corn (shelled).....	Cavan	3,775,180
Corn (ears)	Number	338,607,040
<u>Sugar cane</u>		
Sugar	Kilo	249,069,560
Canes	Ton	5,424,140
Molasses	Liter	10,007,930
Tobacco	Kilo	10,131,460
<u>Coconuts</u>		
Nuts	Number	515,744,010
Copra	Kilo	128,112,070
Oil	Liter	1,803,990
Tuba	"	8,337,040
Abaca	Kilo	118,537,600
Camote	"	126,742,060
Cassava	"	57,572,850
Gabe	"	13,688,490
Mongo	"	2,144,110
Bananas	"	71,489,100
Coffee	"	1,980,910
Cacao	"	355,520
Beans and vegetables	"	19,622,480
Fruits	"	22,746,200
All others	"	8,845,810
LIVESTOCK AND POULTRY -		
Cattle	Number	615,750
Carabaos	"	578,000
Horses	"	100,390
Pigs	"	1,239,700
Goats	"	75,620
Chickens	"	9,236,180
D. ks	"	288,800
<u>Eggs</u>		
Chickens	Number	34,451,930
Ducks	"	1,393,710
FARM IMPLEMENTS -		
Plows	Number	198,780
Harrows	"	113,650
Tractors	"	384
All others	"	414,990
MISCELLANEOUS	-	-

3/15/51
+2
0/15/22/0

Checked by J. Swainson

Transcribed by Y. Swainson

Loc 2880 (二二五)

d. 農業ノ損害 一 次表ハ 農作物・家畜・家禽・農具

ニ對スル 損害ヲ示ス。

掠奪強要・火災・徵発等ニ依テ 一九四一年

十二月八日(日) 一九四五年七月四日(日) フォリツロニ

於テ 農作物・家畜・家禽・農具ニ對スル

戦年損害總量

戦災ノ全量

項目	單位	量
----	----	---

全農作物

米

米	カブタン	一六・四〇一・二九〇
---	------	------------

米(白米)	精	一〇・四七五・一〇・二
-------	---	-------------

玉蜀黍

小麦

玉蜀黍(晚莢)

小麦(束内)

玉蜀黍

小麦(穂附)

砂糖 小麦

砂糖

砂糖 燕麥

砂糖 小麦

小麦
煙草

椰子、實

堅果

コブラ

油

キロ

三、七七五、一八〇

噸

三三八、六〇七、四〇

キロ

二四九、〇八九、五二〇

トン

五四四、四一四、〇

リットル

一〇、〇〇七、九三〇

キロ

一〇、三三、四六〇

噸

五二五、七四四、〇一〇

キロ

一、二八、二二〇、七〇

リットル

一、八〇三、九九〇

4

家畜飼料家畜

牛 ———— 數 六、一、五、七、五、〇

水牛 ———— 〃 五、七、八、〇、〇、〇

馬 ———— 〃 一、〇、〇、三、九、〇

豚 ———— 〃 一、二、三、九、七、〇、〇

山羊 ———— 〃 七、五、六、二、〇

鶏 ———— 〃 九、二、三、六、一、八、〇

家鴨 ———— 〃 二、八、八、八、〇、〇

五子

鶏 ———— 數 三、四、四、五、一、九、三、〇

家鴨 ———— 〃 一、三、九、三、七、一、〇

農具

耕作器

鋤

數

一九八七八。

碎器

馬耙

一二三六五。

牽引車

卜古夕夕卜

三人四

其他

四一四九九。

雜

〃

2. Brief summary of the effects of the war on population and manpower.-

The occupation of the Philippines by the enemy brought untold hardship and suffering upon the people. For about three years the inhabitants were on the verge of starvation. Food supply was forcibly appropriated by the enemy, food production was hampered and the livelihood of the people disrupted by war operations. The inevitable demoralization of the population resulting from the savage fight for existence manifested itself markedly even after liberation in increased crimes and social unrest. War mortality was enormous. Based on available figures, it may be estimated at around half a million.

The estimated labor supply for the Philippines, including all persons 10 years old and over who are able to work, follows:

1939 (Census year)	7,304,300
1941	7,720,200
1946	8,672,900

These estimates are based on the assumption that existing labor supply bears the same ratio to population as the labor supply in 1939. The casualties resulting from massacres by the Japanese, the battle for liberation and other war causes may reduce the estimates for 1946 by from 2 to 4 per cent.

3. Effect of war on rate of progress of industrialization and economic development.-

The destruction wrought by war caused a serious setback to the progress of industrialization and economic development. Before the war, Manila and commercial centers were teeming with large factories and industrial plants with all the modern equipment and facilities for turning out high-grade manufactures in commercial quantities. However, the sugar mills, rope factories, cigar and cigarette factories, coconut oil mills, etc., were laid prostrate in the wake of the liberation and unable to produce sorely needed goods. It will take considerable time before production can catch up with the demand both for local consumption and for export. Many of the pre-war operators depend mostly on war damage payments for the rebuilding of their business but so far no payments have been made so that the prospects of early recovery of the pre-war rate of industrialization and economic development is very dark. Rehabilitation is greatly handicapped by lack of coal and motive power, heavy machinery and perhaps technical guidance.

With 41 out of the 43 sugar centrals destroyed and 73 out of the 148 saw mills totally destroyed, production of sugar and lumber is very insignificant, as compared to prewar production. The same is true with the mining industry. Only copra is recovering rapidly with 45,000 tons shipped to the U.S. in June as compared to 33,000 prewar monthly average. The average for the six months ending June, 1946, was however 23,600 tons.

4. Consumption level of foodstuffs and other consumers goods.-

Rice.-Domestic consumption of rice before the war was 350 grams daily per capita, or a yearly per capita consumption of 2.28 cavans of cleaned rice (56 kilos to a cavan). On the basis of an estimated population of 18,480,000 in 1946, out of which 69.5 per cent constitute the rice-eating population, a total of 29,283,400 cavans of cleaned rice would be needed to support the population, as against the 1945-1946 crop of 17,067,140 cavans of cleaned rice or a deficiency of 12,216,260 cavans, which have to be supplied partly from imports and partly from rice substitutes, such as corn, cassava, gabe, tugui and other root crops.

Sugar.-Prewar consumption of sugar is estimated at 7 kilos or 15.4 pounds per capita, or a total estimated 1946 consumption of about 142,000 short tons. The estimated 1946-47 output of the 5 sugar centrals in operation is 66,000 short tons. There is, thus, a shortage of 76,000 short tons, which have to be wholly supplied from imports.

Checked by J. Muramatsu

Doc. No 2880 (才三頁)

Trans by Grace Hamme

ニ、~~口~~及人カニ ~~東~~ ^及 ~~タ~~ 戦争ノ影響、^概 西~~方~~ ^要 爲

敵國ノ ^ヲ ~~フ~~ ^リ ~~ツ~~ ^ロ ~~ン~~ ^ト ~~占~~ ^領 ~~ハ~~ 國民ノ上ニ ^言 ~~フ~~ ^難 ~~ク~~

苦難ヲ ^極 ~~シ~~ ^ク、^約 ~~三~~ ^年 ~~間~~ 任民ハ ^餓 ~~死~~ ^線 ~~上~~

ニ在^リ ~~タ~~、食糧補給ハ ^敵 ~~軍~~ ^手 ~~中~~ ^ニ ~~握~~ ^ラ ~~レ~~ 戦闘ノ爲

食糧ノ生産ハ ^妨 ~~ガ~~ ^ラ ~~レ~~、生活ハ ^破 ~~壊 ^サ ~~レ~~ ^タ、~~

生存ノ爲、烈シイ戦カラ ^必 ~~ズ~~ ^然 ^ノ 結果トシテ起ル人民ノ ^墮 ~~落~~

ハ ^解 ~~放~~ ^後 ^モ 犯罪ノ増加ヤ ^社 ~~会~~ ^不 ~~安 ^ト ^シ ^テ ^著 ^シ ^ク~~

表ハ^レ ^タ、戦争ニ依ル^ル ^死 ~~亡~~ ^ハ ^莫 ^大 ^ナ ^モ ^テ ^ア ^ツ ^ク、

入手ニ得ル数字ニ依^リ ^テ ^モ ^約 ^五 ^十 ^万 ^ト ^算 ^定 ^サ ^レ ^ヨ ^ウ、

總テ

十才以上ノ働キ得ル者 ^ハ ^下 ^ヲ ^言 ^フ ^ナ、^フ ^キ ^リ

次ノ如ク算定サレル。

W. ^コ ^ン ^ニ ^對 ^ス ^ル 勞力ノ補給ハ ^概 ^算 ^ハ ^不 ^可 ^ニ ^シ ^タ、^如 ^ク ^オ ^カ ^ル

一九三九年(一國勢力調査一年) 七、三〇四、三〇〇

一九四一年 七、七二〇、二〇〇

一九四六年 八、六七二、九〇〇

是 算定ハ一九三九年ノ勞力神給カハ
現在ノ勞力神給カハ
合ニ對スル割合

下圖ト割合ヲ現行ノ勞務神給モ保リテキルトリ

ク同レクストノ
假定ニ基キ
日本軍ニ依ル虐殺、開放

戦、ソノ他ノ一原因ニ依ル死傷ノ爲一九四六年、度ノ

算定ハニパーセント乃至四パーセント減少スルカモ知レヌ。

三、工業化ト經濟發展ノ進捗率ニ對スル戦争ノ影響。

戦争ニ依ル破壊ハ工業化ト經濟發展ノ進展ニ

重大ナ障害トナツタ
戦争以前ニハ「マニラ」商業

②

量

高級製衣

施

都市ハ多量ノ生産スル近代的人設備ト便宜ヲ

備ヘク大工場ヤ工業施設ヲ充テ溢レテキク

然レ乍ラ、製糖工場、製糸工場、煙草工場、椰子油工場

解

等ハ開放ニ際シ破壊ノ状態ニ在リ緊要必要ナ商品

ヲ生産出来ナキ

國內ノ需要ト輸出ノ兩者ハ

ノ要求ニ生産が追ヒ付クニハ可成リノ時ヲ要スルダラシ

戦前ノ企業家ノ多クハ専業ノ再建ニ對シ戦争損害

賠

専ラ

報償ニキリテ頼ッテナルガ事今迄、所何事ノ

対ス

報償モナシテ中ナインテ工業化ト經濟發展ハ戦前ノ

比率ノ急速ナ回復ノ見込ハ甚ク暗イモノデアル。

恐ラ

復興ハ石炭ト動力ノ不足、重機械ト多ク技術指導

ノ不足ノ爲非常ニ禍サレテキル。

々

蔗

製材

四三ノ甘蔗~~蔗~~壓搾場ノ内四十一が破壊サレ一四八ノ~~製材工場~~工場ノ

内七十三が完全ニ壊サレタノデ砂糖ト材木ノ生産ハ

戦前ノ生産ニ比ベテ微々タルモソデアアル。鑛業ニ就イ

全リ

急速ニ

テモ同ソデアアル。唯コアラ丈ケハ~~運~~運~~同~~同復シテ平テ

戦前ノ月平均三万三千トンニ比ベ、七月ニハ^六四万五千トン

ヲ合衆國ニ積出シタ。一九四六年~~々~~六月マデノ

六ヶ月ノ平均ハ然シ二万三千六百トンデアツタ。

四 食糧品ノ他消耗品ノ消費~~規~~標準

六、一 戦前ノ米ノ國內消費ハ一人當リ一日三百五十

グラム~~カ~~カ~~リ~~リ~~即~~即^年年^明明~~對~~對^精精^白白~~米~~米ニ^二二^八八^カカ^ババ^ハハ

消費量デアツタ。(一カバ^ハハ^五五^六六^キキ^ロロ)。(一九四六年ノ

推定

人口一十八萬四千八百八十二人見積人中ラ基準ト其ノ六九、五

パーセントハ米食デアル共、計二千九百二十六萬三千四百

カシノ白米ガ人民ヲ養育ニ必要デアリ一九四五

一九四六年度白米ノ收獲一千七百六萬七千四百四十カ

シ一千二百二十二萬六千九百二十九カ不足トナリ

此ノ不足ハ一輪ハ一面米ノ代替物トシテ小麦

カサミア、ガボ、チユガイ其他ノ根作物ニ依リ補ハ

ネハナラヌ。

砂糖ノ蔵前ノ消費量ハ一人當リ七キロ

即チ一五、四ポンドテ總計約古萬二千米噸ノ消費カ

一九四六年度ニ見積ラレシ。作業中ノ五ツノ甘蔗一壓搾

場ノ一九四六―七年度製糖産見積ハ六萬六千米噸

9

斯ウテ

テアル。 計七万六千石噸が不足也之ハ

全部輸入に依り神ハネバナラヌ。

Meat.- Meat consumption in Manila before the war was 16 kilos or 35.2 pounds per capita. Because of the excessive postwar price of meat which is practically eight times that of prewar, a large portion of the population has shifted to canned foodstuffs, mostly imported from the United States. In view of present difficulties of collecting statistics on slaughtered animals in the provinces, however, there are now no means of ascertaining actual consumption data. It may be stated that the war had a most disastrous effect on the livestock industry.

Imports for consumption of the following articles may throw more light on consumption levels of various other commodities: (a)

Items	1941 (Kilos)	Per capita (Kilos)	Imports 1945 (Kilos)	Per capita im- ports (Kilos)
Grains and preparations	139,330,412	8.30	65,823,548	3.57
Meat and dairy products	20,824,766	1.83	12,480,576	.67
Vegetables and preparations	28,986,842	1.72	6,800,886	.37
	(Sq. yards)	(Sq. yards)	(Sq. yards)	(Sq. yards)
Textiles and manu- factures	167,568,210	9.99	835,108	.045

NOTE: (a) 1941 estimated population16,771,900
1945 " "18,415,100

4a. Present level of production in significant industries as compared with significant prewar years.-

The present level of production as compared with significant prewar years is as follows:

Items	Unit of measure	PRODUCTION	
		Pre-war 1940	Present 1946
Sugar, centrifugal	Short tons	1,044,000	13,000
Lumber	Board feet	340,400,000	150,000,000
Abaca	Bales	1,342,000	237,000
Copra	Tons	738,000	200,000
Coconut oil	Tons	243,000	(Nil)
Cigars	Thousand	331,600	50,000
Electricity	Kwh (thousand)	175,400	50,000
Mines, gold	Pesos	62,700,000	1,000,000

5. Present level of agricultural production compared with prewar.-

Rice.- The area planted for the crop year ending June 30, 1946 was 1,653,820 hectares, or about 21 per cent less than the prewar average of 2,096,720 hectares. The production was 36,134,280 cavanes (44 kilos) of palay (rough rice) or about 30 per cent below the prewar average of 51,401,660 cavan

Corn.- The area planted for the crop year ending June 30, 1946 was 522,570 hectares or about 43 per cent less than the prewar average of 911,140 hectares. The production was 5,178,000 cavanes of 58 kilos or about 45 per cent below the prewar average of 9,421,740 cavanes.

Sugar (centrifugal).- The present production is about 11,646,000 kilos, or about 98.82 per cent less than the prewar average of about 990,000,000 kilo. There were 5 centrals that started operation out of 42 before the war. About 3 more are ready to operate this coming milling season. There are at least two more sugar centrals ready to operate but they lack sugar cane to mill.

1,

Checked by J. Burmester

昭和11

書籍番号 二八八〇

肉。戦前「マニラ」に於ける肉の消費は 一人當り

1.6キログラム即ち35.2ポンドにアラスカ。

戦前、強トハ倍テアン戦後、高ク成リ過キ

直岐ノ為メ大部分ノ人達ハ米 消費

力強トド輸入ナリシ 糧 統合糧ニシテ

換ヘタガ 併 地方ノ屠殺ナリシ

畜類ノ統計蒐集 現在 困難ナルニ 付キ

實際ノ消費資料ヲ確カスル方法ハ

同下ナシ。戦争ハ 家畜 産肉ノ

日増ニ 不幸 影響細小ヲ及ビテ入ト云

へヨウ。

左記品目ノ消費ニ対シ輸入ノ他ノ

種々ナル物ノ消費ノ水増し
* 多クナリ

ハツキリサセルゲアロウ。(イ)
東洋ヲサヘルモノナリ

品目

一九四一年(舊單位) 輸入(キロ単位) 一九四一年(新單位)

穀類(穀類)

穀類(穀類)

肉及牛乳製品

野菜及調味料

織物生地及加工物

註 一九四一年人口見積り
一九四五年令

四國統計局ノ資料ニ比較セル主要生産品ノ

現在生産水準

輸入ノ水準
現在生産水準ハ左ノ如シ

現在生産水準ハ左ノ如シ

穀類(穀類)	一三九、三三〇、四一三	八、三三〇	一六五、二二六
穀類(穀類)	二〇、八三三、七六六	一、一八三	一、一八三
肉及牛乳製品	二八、九八六、八四二	一、七七一	六、〇〇八、六
野菜及調味料	(ヤシキ方) (カシキ方)		(ヤシキ方) (カシキ方)
織物生地及加工物	一七、五六八、二一〇	九、九九九	八、五二八
註	一九四一年人口見積り	一六、七七一、九〇〇	
	一九四五年令	一八、四一五、一〇〇	

品項目

單位

一九四〇年(新穀)

一九四五年(現在)

生産額

遠心力(精)
石粉

噸

105,000

13,000

木材

噸

340,000

150,000

アカ

樽

130,000

13,000

ゴゴ

噸

73,000

11,000

ゴト油

噸

24,000

(完)

巻煙草

トカ

千本

33,600

5,000

電夏

千本

17,500

5,000

銘物金

トン

67,000

1,000

五、戦前と比較せし曲産品(生産)物、現在水準

米——一九四五年六月廿日二日 収穫年

4

於らん作付段別

栽培カレル地域ハ、 53100 ハクターン

即チ戦前ノ平均 509670 ハクターンヨリ 311

パーセントノ減少デアリ。生産高ハ 3613480

カウアン (四四キロ)ノ粗米也即チ戦前平均生産高

511001660 カウアンヨリ 31 パーセントノ減少也

デアリ。

玉蜀黍。一九四五年七月廿日ニ於テ収穫

カレル作付段別ニ栽培カレル地域ハ、 531570 ハクターン

即チ戦前ノ平均 91100 ハクターンヨリ 43100

セントノ減少デアリ。生産高ハ 5178000

カウアン (五八キロ)ノ即チ戦前ノ平均

九、四二、七五〇 カウパンヨリ (約) 四、五八〇—セト

減収
減収テアム

砂糖 (遠心^{カ憲}精製) — 現在生産高ハ

約一、六四六、〇〇〇キロテ即チ前^(約)年^一平均

九九〇、〇〇〇、〇〇〇キロヨリ (約) 九八八、二〇〇—セト

減少^(約)テアム 戦前^(工場)、四十三^(中地)、^(中地)内^(中地)五^(中地)併^(中地)工場

~~中地~~が持業ヲ開始^(工場)シタ。一^(工場)更^(工場)ニ

八^(工場)ヶ所^(工場)の^(工場)集^(工場)ル^(工場)ヲ^(工場)キ^(工場) 製^(工場)糖^(工場) 移^(工場) 期^(工場) 標^(工場) 業^(工場)

スル^(工場)ヲ^(工場)備^(工場) 出^(工場)来^(工場)テ^(工場)ム。 更^(工場)ニ^(工場)テ^(工場)ル^(工場)ハ

砂糖^(工場) 中^(工場)地^(工場)が^(工場)操^(工場)業^(工場)ハ^(工場)一^(工場)併^(工場)一^(工場)ハ^(工場)二^(工場)テ^(工場)ク^(工場)カ

製^(工場)糖^(工場) 中^(工場)地^(工場)が^(工場)操^(工場)業^(工場)ハ^(工場)一^(工場)併^(工場)一^(工場)ハ^(工場)二^(工場)テ^(工場)ク^(工場)カ

Coffee.- The production was about 30,000,000 kilos for the crop year ending June 30, 1946, or about 83 per cent less than the prewar average of 177,730,000 kilos.

Copra.- The production for the crop year ending June 30, 1946 was about 200,000,000 kilos or about 70 per cent less than the prewar average of about 675,000,000 kilos.

6. Present serviceable quantity of railroad rolling stock, trucks, air and water transport equipment (ocean-going and inland), as compared with a significant prewar period.-

The total rolling stock of the Manila Railroad Company is 1,905, including 73 locomotives, 67 passenger coaches, 1 rail motor car, 36 express, baggage and caboose cars, and 1,728 freight cars and service cars. As compared with the serviceable rolling stock in 1941, there is a decrease of 29 per cent in the grand total, and of the following percentages in the different types of rolling stock: About 49 per cent for locomotives; about 68 per cent for passenger coaches; over 98 per cent for rail motor cars; 100 per cent for rail motor car trailers (in 1941 there were 100 of them); about 62 per cent for express, baggage and caboose cars; and about 17 per cent for freight cars and service cars.

The Philippine Railway Company which operates lines in Cebu and Panay islands have not as yet submitted figures. Available prewar figures for this company give a total rolling stock of 388, consisting of 16 locomotives, 56 passenger cars and 266 freight cars. The Cities of Iloilo and Cebu were burned by the Japanese and it is more than likely that a large percentage of the rolling stock of the Philippine Railway Company might have been destroyed there.

The tramway transportation system in Manila, an American enterprise that before the war had around 150 electric cars and 300 buses, was entirely wiped out. The only visible assets in Manila are the tramway lines not removed or destroyed by the Japanese.

Before the war, there were two companies that operated scheduled airlines. They are the Philippine Air Transport Company and the Iloilo-Negros Air Express Company. Aside from the foregoing scheduled operators, there were six non-scheduled operators. All of the above scheduled and non-scheduled operators had during the fiscal year 1939-1940 a total of over 20 serviceable passenger and freight planes that carried 16,209 revenue passengers and a total freight of 3,098,271.50 pounds in air mail and air express. As of June 1946, there were a total of 37 commercial airplanes operated by the Far Eastern Air Transportation Company and the Philippine Air Lines for passenger and freight service and both have reported a total revenue passenger of 107,367 and freight consisting of mail and express totalling 7,727,258.30 pounds for the first half of the current year. The statistics indicate considerable progress over prewar commercial airplane operations.

Available prewar statistics on water transportation are those for 1940 when 730 ocean-going vessels with a total net tonnage of 2,755,606 and 3,547 inter-island and bay and river crafts of different categories (steamers, 62; steam launches, 28; motor ships and auxiliary schooners, 98; launches, boats, bancas with motor, 820; scows, lighters, barges, cascos, and bancas, 960; and sailing vessels, 1,515), with a total net tonnage of 154,613.20 were engaged in foreign and interisland and bay and river trade during that year. Postwar statistics on this subject are still being gathered, although it is of common knowledge and observation that water transportation facilities were among the worst hit during the war. The ocean-going vessels which mostly belonged to the belligerents were practically all wiped out, and present ocean-going steamers coming to the Islands are the few survivors and several new American-owned steamers. Ninety (90) per cent of the steamers belong to the United States; the rest belong to the British, Norwegians, Dutch, Danish and Chinese. Practically all the interisland steamers were sunk during the war. A few of the water-crafts of lesser categories, mostly sailing vessels, were able to survive.

マニラ麻 生産高ハ 一九四六年/昭和二十一年/六月三十日ニ

終ル收穫年度間ニ約 三〇、〇〇〇、〇〇〇 キロ又ハ 戦前平均

ノ 一七七、七三〇、〇〇〇 キロノ 約八十三%ニ 低減シテナル。

コブラー 一九四六年/昭和二十一年/六月三十日ニ 終ル收穫年度

間ニ 約 二〇〇、〇〇〇、〇〇〇 キロ又ハ 戦前平均ノ 一七五、〇〇〇、〇〇〇

キロノ 約七〇%ニ 低減シテナル。

六、現在使用可能ノ 鉄道運用可能車輛、 空中及ビ 海上

兼 運輸機 (太平洋及ビ 内海) ヲ 戦前ノ 重要

時期ニ 比較スルト。

マニラ 鐵路局 全車輛 一、九〇五 台
機関車 七十三 台 旅客車

ソノ内 澤ハ

Translated by
Y. Miyoshi

六十七台、
鐵道自動車一台、
急行車、
荷物車、
職員車

併せて三十六台、
及ビ、
貨車、
業務車併せて一七二八台、
テアル。

一九四一年昭和十六年ノ、
使用可能車輛数ト比較スレト

總合計ニ於テニ二十九%以下ニ、
各車輛ノ型ニ類別スレト

次ノ割合ニ依下シテ也。
即チ、
機關車、
四十九%、
旅客

車、
約六十八%、
鐵道自動車ニ、
就テハ、
九十八%以上、
附

隨、
鐵道自動車ニ、
就テハ、
一〇〇%、
（一九四一年、
昭和十六年）

一〇〇%、
タワシ、
急行車、
荷物車、
職員車ニ、
就テハ、
約六十二%、
約

貨車及ビ業務車ニ、
就テハ、
約十七%、
テアル。

シエフ、
及ビ、
ハネイ、
島ニ、
於テ、
鐵道ヲ、
運轉シ、
テ也。

フリー、
ワ、
ビ、
鐵路、
会社ハ、
マ、
カ、
数字ヲ、
出シ、
テ、
平ナ、
イ。

ニノ倉北ノ戦前ノ借用可能車輛總數ハ三八八台デ、内澤ハ

機関車十六台、旅客車五十六台、貨車二六六台デアリ。

イロイロ及ビエゴ市ハ日本人ニ燒失サレ、フィリピン

鐵路會社ノ車輛ノ大部ハソコテ破損^損サレタモト思ヒレル。

マニラノ軌道輸送組織ハ戦前約一五〇台ノ電車及

三〇〇台ノバスヲ有スルアメリカノ事業デアツタガ今ク破サレテ

シマツタ。マニラ市ニハタビソノ遺産トシテ日本人ガ勤クスト

モ破スニトモ未ナカツタ軌道ノ線路カ見エルクケデアリ。

戦前ハニ倉北ノ定期航運機ヲ運轉シテタツ。

即チフィリピン航運輸送會社、イロイロ及ビ航運輸送會社

カコレデアリ。

前述ノ定期便ノ外ニ六台ノ不定期便ガアツタ。

前述ノ定期便及ビ不定期便ハ一九三九年昭和十四年ノ

一九四〇年昭和十五年ノ歳入年分ニ於テ使用可能

旅客機及ビ貨物機ニ總計千台以上ヲ有シ、コレハ一六、二〇九人

由、有料旅客及ビ航空便、航空輸送ハ併セテ總計

三、〇九八、二七一、五〇封度ノ貨物ヲ輸送シタリ。

一九四六年昭和十五年六月ヲ以テ較べルト、總計三千七百

ノ商用航空機ヲ在東航空機輸送會社トテリフビシ、

旅客、貨物航空路カ運轉シ、兩社ハ今年カ前期ニ

於テ、有料旅客總數一〇七、三三七人ト總計七、七三七、二五八、三〇

封度ノ航空便ト航空輸送ヨリ成ル貨物ヲ報告シタリ。

ニ、統計ハ戦前ノ商用航空機運轉數ヲカナリノ増加ヲ

予ニテナル。

水上輸送船戰前ノ統計ノ使用ニ得ルハ一九四〇年及四五年

ノモノナリ、五年太平洋航行船舶七三〇隻總重量

二、七五五、六〇六噸 及び種別ノ形ノ子内、湾内、河川航行

船舶三、五〇〇隻總重量一、五四、六三〇噸 (汽船)

六十二隻、汽船三十八隻、モーター船及セスクレーナー九十八隻

トキ艇、ボート、モーター附ハンカス併せてハニ〇隻、平岳

伝馬船、船舟、平岳貨物船、カヌー、
T.N. フリフビン

諸島ニ用ヒラレル一種ノ輕舟、丸木舟九六〇隻、及び

帆走船一、五一五隻)カソノ年内ノ外國貿易、
湾内

貿易 湾内貿易、河川沿岸貿易ニ従ルヲテナク。

この問題ニ関スル戦後ノ統計ハ今尙集計サレワケアルコ、水上
輸送ノ便ハ戦争中ノ最盛ノ状態ニアツタコトハ一故ニ知ラレテ
オリ廻羣サレテキル。

概ネ敵ノ所有シテキタル太平洋
航行船舶ハ美降ニハ全ク擧サレテシマタ。現在ニ諸島

ニ来ル太平洋航行汽船ハゴク僅カニ残存シリモノトアメリカ
所有ノ私汽船數隻トテアル。汽船ノ90%ハ合衆子ニ

屬ス。他ハイキリス、ノルウェー、オランダ、デンマーク支那ニ

屬ス。美降ニハ私汽船ハ全部戦争中ニ沈没シタ。

小型ノモーター・ラフト、小艇トモトモト駛馳スル船舶ノゴク數隻ト

帆走船ノ大部ガハ残存スルコトガ出来タ。

As regards motor vehicle transportation, there were registered in 1940 (only complete available record) a total of 20,236 motor trucks and 33,818 automobiles, or a total of 54,134 motor cars and trucks. In 1945, the preliminary registration figures give a total of 8,996 for motor trucks and 3,824 for automobiles, Manila and Rizal excluded, or a total of 12,820. Adding the registration of 12,613 trucks and 6,476 automobiles for Manila and Rizal for the first part of 1946, we get a full total of 31,909 motor car registration in 1945-1946. This full total compared with that of 1940 shows a decrease of over 41 per cent.

7. Estimated attainable level, as compared with prewar output, or industrial and agricultural production.-

a. Damage to agricultural industry during the war may be conservatively estimated at about 33-1/3 per cent of the total value.

- (a) Sugar industry - 43 per cent of sugar centrals and refineries.
- (b) Tobacco industry - 60 per cent of prewar production.
- (c) Abaca industry - 30 per cent of the plantations, excluding damages to stripping machines, sheds, etc., worth more than ₱3,000,000.
- (d) Coconut industry - 50 per cent of the coconut oil and desiccated coconut factories, 40 per cent of copra driers, warehouses and other establishments and 5 per cent of coconut trees.

b. Attainable level of agricultural and industrial production assuming an adequate supply of raw materials and energy, compared with the prewar.

<u>Products</u>	<u>Unit</u>	<u>Prewar production</u>	<u>Attainable level of production</u>
Rice	Cavanos	51,401,660	40,000,000
Corn	"	9,421,740	6,000,000
Sugar -			
Centrifugal.....	Kilos	990,000,000	350,000,000
Muscovado	"	41,000,000	20,000,000
Abaca	"	177,730,000	100,000,000
Tobacco	"	42,000,000	20,000,000
Copra	"	675,000,000	500,000,000
Coconut oil	Tons	343,000	10,000
Lumber	Board feet	340,400,000	100,000,000
Embroideries		₱17,755,000	₱ 1,000,000
Cigars	Thousand	331,600	50,000
Cigarettes	"	3,292,900	1,000,000
Cordage		₱ 3,300,000	₱ 1,000,000
Shoes	Pairs	2,455,600	500,000
Electricity	Kwh	175,400	75,000

8. To what extent has the lack of agricultural and industrial equipment impaired immediate recovery?

In the case of the sugar and tobacco industry, the lack of agricultural and industrial equipment will retard 60 per cent of their immediate recovery. In the case of lowland rice, about 10 per cent and for upland rice and corn, about 30 per cent. In the case of abaca, it will be around 40 per cent, for copra, 20 per cent, and for coconut oil, 50 per cent.

9. To what extent has the lack of raw materials impaired immediate recovery?

The lack of raw materials has not seriously impaired the immediate recovery of industries, with the exception of the sugar industry and to some extent of the abaca industry as almost all the sugar plantations were destroyed and some of the big abaca plantations were partly damaged due to war operations. The scarcity of hides for the shoe and slipper industry and for cannisters for the canning industry also handicaps the rapid recovery of these industries.

甲本記

書類番号 二八八〇

(6) 自動車輸送(二箇) 一九四〇年(二) 唯一

入手に得ル完結記録(合計=〇,三三六台)

自動車 一三三,八九台、自働車 即ち

合計 五四,一三四台、自動車又(貨車)が登録

一九四五年 予備登録

お子ハ 合計 八九六台、自働貨車及

三、八二四名、自動車、テアウ、マニラ、ト、リガ、

ハ除外ナシテ居ル等 即ち 合計 一三,八〇名

テアル。 一九四五年 中一期、マニラ、及、リ、サ、

一三,六一三台、ト、ラ、ウ、ト、六、四、七、六、台、自働

車、登録ヲ追加シテ 一九四五年—一九四六年

由ニ統計三一、九〇、九台ノ自動車登録

トナル。此ノ統計ハ一九四〇年ノソレニ比較

シテ四一、〇一、セニトシ以上ノ減少ヲ示シテ

居ル。

七、戦前ノ生産高ニ比較シテ到達シ得ヘキ

豫測水準トシ、或ハ産業及農業ノ

生産高

(内輪見極メテ)

(一) 戦外中ノ農業ノ蒙ルニ損害ハ

其ノ全(價値)ノ三三、三令ノ一ノ一セニトシナラン。

(二) 製糖業ノ砂糖甘蔗压榨分中心地及精糖

四三、〇一、セニトシ

(D) 製煙業 - 戦前生産高の六〇パーセント

(イ) アバカ生産業 - 剥皮器械十舎其他

ノ損害 三〇〇〇、〇〇〇.P 以上ヲ除キ、栽培

ノシロバセメント

(ロ) コ、ナツト生産業 - コ、ナツト油及コ、ナツト

乾燥工場ノ五〇パーセント、コ、ナツト乾燥

畧倉庫及其他施設ノ四〇パーセント

及コ、ナツト樹ノ五パーセント

(E) 戦前比較ニテノ適量ノ原料及工場

ノガ、ナツトナツト ~~ノ~~ 假定 ~~ノ~~ 農工業生産

高ノ到達ニ得ヘキ水準!

生産物	単位	生産高	生産高
米	カウチネ	五、四〇一、六六〇	四〇、〇〇〇、〇〇〇
玉蜀黍	"	九、四三三、七四〇	六、〇〇〇、〇〇〇
砂糖	キロ	九、九〇〇、〇〇〇	三、五〇〇、〇〇〇
アバカ	"	一、七七七、七三〇	一〇〇、〇〇〇、〇〇〇
タバコ	"	四、〇〇〇、〇〇〇	一〇〇、〇〇〇、〇〇〇
コパ	"	六、七五〇、〇〇〇	五〇〇、〇〇〇、〇〇〇
コ、チトシ油	リットル	三、四三三、〇〇〇	一〇、〇〇〇、〇〇〇
木材	"	三、四〇〇、〇〇〇	一〇〇、〇〇〇、〇〇〇
利續	"	一〇、七五五、〇〇〇	一〇〇、〇〇〇、〇〇〇
シカ	1000	三、三六〇	五〇、〇〇〇
電気	"	三、九九〇	一〇〇、〇〇〇
靴	パリ	三、四五五、六〇〇	五〇、〇〇〇
電気	キロワット	一、七五、四〇〇	七五、〇〇〇

戦前

戦後

(八) 農工業施設ノ不備カ如何トシ程歟 即ち

恢復ヲ阻害シ居ルヤ

製糖及製煙業ノ場合ニ農業者ノ施設

不足が甚^等事業、即時恢復ヲ為^スルニシテ

● 遷^リテ^イル。 低地産自米ノ場合ハ

約一〇〇一セント 高知産自米及玉蜀黍

一の場合ハ約三〇〇一セントニシテ、

場合ハ約四〇〇一セントニシテ、

一セントニシテ、而シテ、コトナクハ約五〇〇一セントニシテ

アアム。

(九) 原料不足が即産一恢復ヲ如何ニシテ

阻害シ居ルヤ。

策戦行動ノ為^ニテ製糖栽培地ノ強^クシテ

総アガ^リ又アハ^ル大栽培地ノ数々所ノカ部合的

(6)

製糖業ト或ハ糖製造ノ中心トシテ糖業

ヲ除ク

ニ、破壊セシメテ原料ノ不足ハ即時恢復

ヲ左程阻害スルモノナシ

靴トスリワビレ工業用皮革ノ拂底 製鉄

ヲ業ノ 又亦此等ノ産業ノ急進也

恢復ヲ妨礙スルモノナシ

However, the key to immediate recovery is the restoration of the plants, heavy machinery and buildings to start sizeable production. The Philippines is endowed with plenty of raw materials so that lack of it is not so much a problem.

10. To what extent has lack of transport facilities impaired immediate recovery?

Immediate recovery is being impeded greatly by a lack of sufficient transportation facilities and this is particularly true in the case of inter-island transportation which has been crippled almost 100 per cent by the war and has affected seriously the shipment of lumber and other building materials as well as of foodstuffs and other necessities of life to the devastated areas. The wide disparity between the living cost in Manila and distant provinces is due largely to the lack of transportation facilities that hinder the flow of commerce to and from the metropolis. But even in overseas commerce, the lack of shipping lines to Europe and parts of Asia has left only the United States as the market for Philippine products which before the war had a much wider outlet, particularly for leaf tobacco, copra, Manila hemp, Manila rope, hides and skins, etc.

11. To what extent has the lack of financial means impaired immediate recovery?

Because of the insufficiency of government revenues, the Government has not been able to undertake any wide-scale reconstruction work. Damaged public buildings, roads, bridges, portworks, railroads, etc., are not as yet repaired pending the receipt of the P240,000,000 share of the Government from the Tydings War Damage Compensation Act. ✓

The same can be said of private industry. Destroyed sugar centrals, tobacco factories, rice mills, lumber mills, coconut oil mills, desiccated coconut factories, rope factories, distilleries, shoe factories, mining works, etc., are still out of operation pending the receipt of substantial capital to rehabilitate them or to supply the much needed capital equipment almost totally destroyed by the war.

II. ANSWERS TO QUESTIONS CONCERNING LONG RANGE RECOVERY AND DEVELOPMENT PROGRAMS.

11c. What is the level of consumption of foodstuffs and other consumers goods and standards of housing, anticipated during the next 18 months, five years or more.

(See answer to question No. 4 concerning the level of consumption of foodstuffs and other consumers goods.) With the enormous destruction of dwelling especially in urban centers, thousands upon thousands of people are housed in temporary structures devoid of the necessary sanitation facilities. It may take 10 to 15 years before prewar standards of housing is restored.

12. Does the production pattern proposed in the country's development program differ materially from the prewar pattern and in what respects?

The production pattern proposed in the country's development will not differ materially from the prewar pattern except in the sugar industry where production may be reduced as a result of the destruction of machinery which was extensively used in this industry before the war. Owing to the destruction of work animals, the use of farm machinery is contemplated in the production of rice, corn, tobacco, root crops and vegetables besides sugar cane.

13. To what extent do the changes proposed in the prewar production pattern take into account the modifications in the economies of other countries?

The production pattern proposed for rice is based on the methods of production in the United States. For this purpose, an agricultural mission was sent to the United States a year ago to study the possibility of mechanizing our rice industry in a manner similar to that of the United States.

14. To what extent are such changes the result of a necessity to increase exports?

Our principal export crops before the war were sugar, copra, coconut oil, desiccated coconut, abaca, and tobacco. Before the war (1940), we exported

translated
by
K. NISHIWAKI.

(二)

ケレド又即急ノ回復ノ鍵ハ計画ノ復旧ニアル。即チ

重要機械ト建築ヲ順々ニ製作シ始ルコトデアル。

フィリピンハ多量ノ埃滓ヲ有レテイルカラ其ノ欠乏ハ

ソレ程問題ハナイ。

一〇、如何ナル範囲ニテ 輸送機関が即急ノ回復

ノ欠乏

ヲ害シタカ。

即急ノ回復ハ充分ナル輸送機関ノ欠乏ニヨリ非常

ニ妨害サレタ。且此ノ事ハ島内ノ輸送ノ場合特ニ本島

ノコトデアル。其ノ輸送ハ戦争ニヨリ強シド 一〇〇%

不具ニサセラレタ且材木ノ積出及ビ他ノ建築材料

ハ、荒廢ノ地区ハ食糧及ビ他ノ生活必需品ト同様

非常ニ影響ヲ受ケタ。マニラト地方ニ在ケル生活

費、非常ニ懸隔ハ輸送機關、欠乏ニ基因シ

輸送機關ハ都市ヨリ又ハ都市ヘ、商民ノ抗ヲ

阻害シタ。併シ海外通商ニ在テサハ、歐洲及亞

細亞ノ一部分ヘ、航路ノ不足ハタゞ米國ノ残

ヲタソレハ戰前、非常ニ廣クイ販路ヲ有シタ、特ニ

セオタバコ、ココア、マニラ麻、マニラ繩、獸皮革等

フィリピンノ産物ノタメノ市場デアツタカラデアル。

一、如何ナル範圍ニテ金融手段ノ欠乏ガ即急

ノ回復ヲ害シタカ。

政府ノ歳入ノ不十分ノタメ、政府ハ如何ナル広尺度ノ

再建事業ヲ企テルエトガ出来ナカッタ。損害ヲ蒙ッタ

(三)

公共ノ建物、道路、橋梁、港湾、鉄道等修

繕サレズニアル。TYDING 戦災補償法カラノ

政府ノ持分ニ四〇、〇〇〇、〇〇〇ペソノ受取繋屋中ノ

モノガアル。

同様ノ事柄ガ民間産業ニ就イテモ言ハレル。

破壊サレタ中央砂糖、タバコ工場、精米所、材木工場、

コンナフト油製造所、コンナフト乾燥工業、ロープ工場、酒

造所、製靴工業、鑛業等依然トシテ復旧スル

タメ、今稱資本金未度理ノタメ或ハ提供スベキ莫

大ナル必要資金ガ殆ト全部戦争ニヨリ破壊サレタ

夕々揮業ヲ中止シテヲル。

(四)

二(三?) 長期間、回復ト発展ニ関スルプログラムノ

質問ニ対スル答弁

二(二) 十八ヶ月間、五年又ハ五年以上ヲ見越シテ

食料品ノ消費高及地ノ消耗品及ビ家屋ノ標準

ノレベルハ何デアリカ。

(食料品ノ消費高及地ノ消耗品ニ関スル第四号

ノ質問ノ答ニ参照) 住家ノ莫大ナル破壊特ニ

中央都市ニ於ケルソレハ 何千人ノ人々が 衛生施設物

ヲ欠ク一時的建物ノ中ニ住ニデイル。 戦前ノ住居ノ

標準ヲ回復スルニハ十年乃至十五年ヲ要スデアロウ。

一三、國家ノ發展計畫ニ於テ生産ノ様式ガ戰前ノ様

式ト物質的ニ異ルカ 且如何ナル莫ニ於テカ。

其ノ國ノ發展ニ於テ要求サレタ生産様式ハ砂糖ノ産業

ヲ除キ物質的ニ異ラナイ、其ノ砂糖ノ生産ハ戰前

以ノ國ニ於テ廣ク使用サレタ機用ノ破壊ノ結果

減少シタノデラ口ウ、労働ニ使用スル動物ノ破壊ニ

基キ農場ニ用フル機械ノ使用ガ米、麦、タバコ

砂糖キビノ外ニ

根類及ビ野菜ノ生産ニ計畫サレル。

一三、如何ナル範圍迄、戰前ノ生産ニ於テ要求サレタ変化

ガ他國ノ経済ニ於ケル修正ヲ考慮ニ入レラレタカ。

米ニ就イテ要求サレタ生産様式ハ米國ニ於ケル生産

方法ニ基因スル。此ノ目的ノタメ農業使節ガ

米國ト同様ノ方法ニ我々ノ米ノ産業ノ機械化ヲ

研究スルタメ一年前派遣サレタ。

一四、如何ナル範圍迄カ、ル変化ガ、輸出ヲ増加スルベク

必要性ヲ召来シタカ。

戰前

我々ノ、基本的ノ輸出作物ハ、砂糖、コブラ、ユ、ナフト

油、乾燥コ、ナフト、Rubber 及ビタバコデアッタ。

戰前(一九四〇) 我々ハ、
輸出品

x
x
x
x
x
x
x
x
x
x

40,517,898 kilos of desiccated coconut; 177,453,863 kilos of inedible coconut oil; 8,443,294 kilos of edible coconut oil; 341,930,371 kilos of copra; 923,542,586 kilos of centrifugal sugar; 52,931,188 kilos of refined sugar; 12,222,118 kilos of leaf tobacco; 206,231,102 cigars; 136,558,743 cigarettes; and about 1,402,720 bales (126.5 kilos) of unmanufactured abaca, or about 177,400,000 kilos.

In 1945 we exported only about 9,000,000 kilos of copra and about 2,400,000 kilos of abaca, and during the first half of 1946, we exported only around 141,783,000 kilos of copra and about 20,000,000 kilos of abaca. We have not exported sugar and tobacco. To increase, therefore, our production both of the raw materials and of the manufactured products and thereby increasing our exports, we need agricultural and industrial machinery to replace those destroyed during the war.

15. To what extent are such changes the result of a necessity to decrease imports?

Our rice production before the war was about 51,400,000 cavanes of palay (rough rice) and our yearly average rice importation from 1937 to 1941, excluding about 15,000 cavanes exported at the same time was 756,250 cavanes of 56 kilos, or equivalent to about 1,532,500 cavanes of palay. The yearly consumption of milled rice now in the Philippines is about 30,000,000 cavanes, or about 60,000,000 cavanes of palay. Our production was only about 18,000,000 cavanes (36,000,000 cavanes of palay). Hence, a deficit of about 12,000,000 cavanes of 56 kilos, or 24,000,000 cavanes (14 kilos) of palay which we have to import from other countries. Hence, the need for the use of farm machinery for the immediate recovery of the industry to minimize our rice import.

Development of vast potential resources and industrialization of our country, through the introduction of modern equipment and the training of the necessary personnel, would help decrease imports. Such imported items as paper, textiles, fish, vegetables, cocoa, coffee, sugar, edible vegetable oils, etc. could be easily produced or processed locally.

16. To what extent are such changes dependent upon the importation of capital equipment?

In the manufacturing industries, such changes are largely dependent on the importation of capital equipment.

17. To what extent are such changes dependent on imported raw materials?

The proposed changes do not depend on imported raw materials as the Philippines abounds in raw materials, except industrial chemicals. Conversion of raw materials into finished products through the use of imported capital equipment is one of our distinct needs, if industrialization is to be encouraged.

18. What addition to the existing stock of trucks, railroad, water and air transport equipment are required, in order to meet the goals set by the longer range recovery and development programme? To what extent can these additions be met out of domestic production?

Information called for by this question can be furnished only by higher authorities -- those that shape the basic policies of the government. However it can be assumed that it is a basic policy to restore the public utilities to their prewar status to improve the living conditions of the mass of the people; in which case the much needed equipment must have to be imported as they are not manufactured locally. The Philippines is as yet in an agricultural stage of development, and it will take years before heavy industries can be successfully established here.

Translated by Teiichi YAMAMOTO
Dec 11th 46

一四、ソノ改変ノ為メ何ノ程度ノ輸出増進ヲ必要ガ

アルニシテカ

吾國ノ主要輸出農産物ニ戦前ニ砂糖、椰子蜜、

椰子油、乾燥椰子、「アベカ」及ビ煙草ニアリタ、戦前(

19.8)

九四〇年)ニ吾國ニ乾燥椰子四〇、五七、八九ハ噸、水食

用椰子油一七七、四五八、八六三噸、食用椰子油八、四四三、二九四

噸、椰子蜜三、四九三、三七一噸、粗糖九三三、五四二、五九三噸

精制砂糖五二九三、一八八噸、葉煙草二、三三三、一一八噸、葉

巻煙草二〇、五三三、一〇二噸、捲煙草一、三六、五五八、七四三噸

原料アベカ約一、四〇、二七二噸(一二六、五噸差)即チ約一七七、四〇〇、〇〇〇

噸ヲ輸出セシメタ

一九四五年度の唯一椰子消費九〇〇〇〇〇〇觔、アベカニ³⁵四〇〇〇〇〇觔

輸出は一九四六年の前年より唯一椰子消費一四一七八二〇〇〇觔位及び

アベカニ〇〇〇〇〇〇觔程の輸出を計り、砂糖及び椰子煙草の輸出

はマセレンタ、ソレ故に吾國の椰子料不足の創設より増産に依

つて輸出も増産に努め、戦時中の破壊された曲長共軍用並に創設

の主要な機械が必要ならシアル

十五、リノ変更を為すに程々の輸入を減らす必要があるにシカ

吾國の戦前、米の生産の概(脱穀してナイ米)約五二、四〇〇、〇〇〇

カヴァレスニアワタ、而して一九三七年から一九四二年迄の平均年間

輸入米は同期に輸出をサレタ³⁶一五〇〇〇カヴァレスヲ除外して五十

トシ平均位、七五三、二五〇カヴァレス、即ち概一、五三二、五〇〇

カウプレスと同量デアツタ、現在此律定、年間消費、白米ノ巨量

ハ三〇〇〇〇〇〇〇カウプレス 即チ米五六〇〇〇〇〇〇〇カウプレスデアン、セル

チル年産ハ僅カ五〇〇〇〇〇〇カウプレス (米三六〇〇〇〇〇〇カウプレス) デアツタ

ソレ五六千噸位、五〇〇〇〇〇〇カウプレスノ不足、即チ四千噸位

位、米二四〇〇〇〇〇〇カウプレスハ他國カチ輸入シサケルナラヌ。コレガ

為メ、米ノ輸入ヲ防遏スル為メ、米子米ニ生産基ヲ復興用ト

シテ農業基ヲ機械ヲ使テ學リテ、

新式ノ機械ヲ導入シテ、技術者ヲ養成シテ、廣ク大ナル

米田ノ生産資源ヲ振興スル事ヲ急務トシ、輸入ヲ防遏シ

スル事、穀、糖、輸入品、中、紙、織物、炭、野米、コ、ア

咖啡、砂糖、植物油、食用油等ノ貿易、国内ヲ生産シ、又

ハ製紙送る出する

十六、ソノ稼働率ノ為メ如何ニ稼働率ニ主要設備ノ輸入ヲ

必要ナルモノニテリマラスカ

製紙工事業方面ハソノ稼働率ノ為メ廣汎ニ主要設

備ノ輸入ヲ必要ニマス

十七、ソノ稼働率ノ為メ如何ニ稼働率ニ主要設備ノ輸入ヲ

必要ナルモノニテリマラスカ

計畫中ノ改善ノ対シテハ此種主要設備ノ輸入ヲ

持ツルモノカラス事業用設備以外ハ輸入ニ倚賴シマセヌ

製紙送る事業ノ稼働率ノ為メ輸入シタル主要設備ヲ用ヒテ

原料ノ精製及加工等ノ設備ノ輸入ニ必要ナルモノニテリマラスカ

スル處デアリマス

十六、長期計畫ノ復興並ニ開発目論見ノ完成ヲ見ルニハ

現存ノトコヲ、鐵道、水運及ヒ空輸施設ノ外ニコレ程

ノ追加ガ入用ヲスカ。ユノ追加ニ對シ國內ヲハ如何程

生産出キルノテスカ

コノ値同ニ對スル返答ハ高級當局即チ政府ノ基本政

策ヲ極メル人ニナケレバ出キマセヌ、然レ人民大衆ノ生活状

態ヲ改善セシテ戰前ノ状態ニ公衆設備ヲ回復スルト

カ基本政策ヲシントス事ハ確言出キヤラス、ソノ場合

是ハ必要ナ設備ハ國內ヲハ製造法出キマセシカテ輸入待ツ

外リアリマセシ

(5)

此律案より今猶其先達程度の農事時^代ス、国内の事

工本が完全に行レヤウニナル迄ニ、是年^月ヲ要スルテモウ

6

18 a. What additions are contemplated in construction of roads, bridges, railroads, and waterways and airfields for economic development.

The primary objective of the Republic is to repair prewar damaged roads and bridges, portworks, public buildings (including schools and hospitals), airways, lighthouses, and the government operated railways; that is to say, restore them to their serviceable status before the war. However, in reconstructing devastated Manila, there is a project to build a national capitol with an outlay of some P45,000,000. There is also a project to build a military road connecting San Fernando, La Union province and Batangas, Batangas province, and another project to repair present piers and warehouses in Manila and to build several new ones on the north side of the harbor to provide for future expansion of the volume of trade passing through the port of Manila.

All the foregoing projects will be built from the sum of P240,000,000 to be set aside for said government projects in the Tyding's War Damage Act. The sum of P150,000,000 has already been made available for the military road, the repair of the University of the Philippines, the construction and repair of portworks, construction of the proposed national capitol, and the repair of public schools and hospitals.

New projects of similar magnitude may also be undertaken in naval and military reservations of the United States in the islands, including the construction, improvement and expansion of airways for military use within those bases. It is the United States Government that will finance them.

19. Significant data on the trend of birth and death rates, population shifts, and related factors.

The birth rate in the Philippines appears to have registered no appreciable change, the rate per thousand population in 1940 being 32.28 as compared with 32.83 in 1931. In years between these two periods the variation in the birth rate is insignificant. On the other hand, the death rate per thousand population indicated an appreciable improvement, as the rate dropped from 17.97 per thousand in 1931 to 16.50 in 1940. It is estimated that about 350,000 persons are added annually to the population. (Population as of the Census of 1939 was 16,000,303; estimated as of January 1, 1946 it was 18,846,000)

Prior to the war, there were two classes of population movements in the Philippines; namely, (a) natural current and (b) artificial movement, the latter representing persons transferring to scarcely populated areas under Government auspices for the purpose of settling lands of the public domain. For the period 1931-1939 the average number of homeseekers sent under Government assistance was 2,520. The natural current may be divided into two kinds - migration from rural to rural communities and the drift of rural population toward the cities. No data are available regarding these movements.

The following table shows the occupational distribution of gainful workers in the Philippines:

GAINFUL WORKERS TEN YEARS OLD AND OVER, BY GENERAL OCCUPATION GROUPS AND BY SEX: 1939

Occupation Group	NUMBER			Per cent
	Male	Female	Both sexes	distribution
				Both sexes
TOTAL	4,219,278	4,247,215	8,466,493	100.0
Agriculture	2,981,551	474,819	3,456,370	40.8
Domestic and personal service.	123,508	3,354,576	3,478,084 1/	41.1
Professional service	65,438	37,977	103,415	1.2
Public service (not elsewhere classified)..	48,984	636	49,620	0.6
Fishing	175,841	4,728	180,569	2.1
Forestry and hunting	24,903	1,917	26,820	0.3
Mining and quarrying	46,625	394	47,019	0.6
Manufacturing & mech. Industries	333,976	267,359	601,335	7.1
Trans. and communication	202,449	1,147	203,596	2.4
Clerical	44,904	3,995	48,899	0.6
Trade	171,099	99,667	270,766	3.2

1/ Includes 3,145,763 housewives.

In view of the unsatisfactory conditions in agricultural employments, there is a tendency for rural people to seek work in urban centers. As a result, a considerable proportion of those formerly engaged in agricultural activities may now be found either in trade or in U. S. Army employment.

20. Can the contemplated changes in the prewar production pattern take place with the present labour force, taking into account average working hours?

Whatever changes are contemplated in prewar production pattern, the labour supply is more than adequate to meet the demands of both agriculture and industry for many years to come.

21. To what extent do such changes require the transfer of labour between different branches of activity, particularly between agriculture and industry?

Expansion in agriculture and industry will not be handicapped as far as labor requirement is concerned. Prior to the war it was the practice of big enterprises to send representatives to recruit laborers in areas where labor was plentiful. With improved system of labor recruitment and better conditions of employment, the labor needs of both agriculture and industry can be easily met.

22. To what extent will such transfers require the increased mechanization of agriculture?

The need for increased mechanization of agriculture is not so much due to lack of manpower on the farm as we have enough of them, but we lack work animals. Before the war, there were about 3,870,000 work animals on farms, 74 per cent of which were carabaos. The number of carabaos left is about 40 per cent below the prewar of about 3,400,000 and our cattle is about 70 per cent below the prewar of about 1,400,000 heads. The number of work animals left after the war is probably around 40 per cent below the prewar population. The transfer of labor between agriculture and industry will not increase very much the need for mechanization of agriculture.

23. To what extent will the development programs require an increase of certain categories of workers, or of managerial or scientific personnel?

As Philippine economy is essentially agricultural, the great bulk of the working people are engaged in agricultural pursuits. At present unskilled labor predominates as mechanization in agriculture is negligible. In 1939 there were 247,146 skilled laborers, most of whom were employed in industrial and commercial enterprises and other non-farming occupations. The number of skilled laborers may have increased since liberation as a result of the training they gained while in the employ of the U. S. Army. In Greater Manila area alone, the U. S. Army was employing some 70,000 skilled workers in August 1945. A large proportion of these probably belonged to the unskilled class before the war, when the total number of skilled workers in Manila was 35,941 only. To meet present and future demands, the necessity of training managerial and scientific personnel, which the country sadly lacks, appears in order. The training of additional skilled workers may likewise be necessary.

24. To what extent is a surplus of labor anticipated over the next few years, and in what categories of workers? Is migration of such labour contemplated, and to what extent?

As already indicated elsewhere in this report, surplus labor especially in the unskilled class will be available to meet future expansion in agriculture and in industry. In 1939, the total number of gainfully employed persons 10 years old and over was 5,320,730, excluding housewives, and the labor supply was 7,304,300, or a surplus of 1,983,580, or 37.03 per cent. Prior to the war, the mobility of labor from island to island presented some difficulties although in centers of population like Luzon, labor mobility was facilitated by the network of good roads and cheap means of transportation. The migration of laborers from one area to another will depend upon the demands of employing enterprises.

「ラ・ユニオン」州、

又「サエ・フェルナンド」ト「バタンガス」州「バタン

ガス」ヲ經ル「軍用道路」建設ノ計畫モアリ、

又「マニラ」ニ於テ「現在」ノ「堤」ノ「倉庫」ヲ

修築「マニラ」港ヲ通シテ「ワタス」島ヲ回ルモノ

今後ノ増大ニ備ヘテ「港」ノ「北」ニ於テ「五個

ノ新」トキ「堤」及「倉庫」ヲ建設セリト

スル「他ノ」計畫モアリ。

「前」述ノ「計畫」ハ「米」ノ「タイ」ニ「關」スル「戦

災」條例「中」ニ「米」ノ「前」記「政府」計畫「入」分

トシテ「計」上セラルル「米」幾「計」ニ「百」〇、〇〇〇、〇〇〇。

「ス」ノ「中」ヨリ「建設」セリ「米」ノ「入」ニ「關」スル。

統計

概一五〇、〇〇〇、〇〇〇、〇〇〇

「フイリフピン」ス子ノ修理、港灣施設ノ

建設、修理、計画ヤリシク、會議室建設、

並ロハラニ学校及ヒ病院ノ修理ニ便

用サレ得ルト決定スルコトナリ。

又、
同様ノ必要ト新規計画ハ、諸島

内ノアメリカ陸海軍保及地ニ及リ

テ、三ヶ所トシテ、ソノ中ニハ、コレ等ノ

其ノ地内ニ、三ヶ所軍用航路ノ建設

改修、拡張カ入ラマシメナリ。テ、コレ等ノ

計画ニ対シテ、三ヶ所資金ヲ投スルハ、米國

又之付ラアル。

一九、出生及死亡ノ率ノ傾向、人口ノ變

化及ビ關係ニ要因ニ關スル事ニ對シ

資料。

「イリソ、ン」ニ於テハ、出生率千ハ、人口一千ニ

對スル比率、一九二一年ノ三、八三ニ比シ、

一九四〇年ハ三、二八ニ比シ、目立ツ程力ノ變化

モニテ、千ハ、見ユクナリ。コトヲ示シ、

年ノ間ニ於テハ、出生率ノ變化ハ

僅小ニアリ。コレニ及シ、人口一千ニ對スル

死亡率ハ、一九二一年ノ一、七九ニ對スル一、七九也

ヨリ一九四〇年ニハ一六、五〇〇減じ

顯著ナル
裁介カキ

好化^轉ヲ示シテ。レ母々凡ソ三五〇、〇〇〇人

口が増加シツアルモノト推定スル。一九

三九年、人口調査^{ニ於テ}ハ一六、〇〇〇、三〇〇

名ヲアツタ。一九四六年一月一日付ノ推定ニ

ハ一八、八四六、〇〇〇テアツタ。(

戦前^ノアフリカ^ニハ=後ノ人口

移動カ行ハシテヤ。即チ(イ)自然的

変流^ト由人爲的移動デアリ。後者ハ

政府ノ保護ノ下ニ公有地植民ノ目的

ヲ以テ人口稀薄ノ地域ニ移動スル人々

Doc. 1880
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ヲ指ス。一九三〇ヨリ一九三九年マデノ期

同ニ於テ、政府又援ノ下ニ送ラセタリ

民ノ平均妻ニ五ニ〇ニアリ。自然的

交流ハ曲辰村ヨリ曲辰村ヘノ移住ト、曲辰村

人口ノ都市ノ流入ノ二種ニ分ケ得

ル。コレ等ノ移住ノ間ニテハ、何等ノ

料ハナシ。

次表ハコトヲ示シテ在給男幼

者ノ職業的ハカチヲ示スモノナリ。

一般職業別並ニ性別ニ依ル十支以上ノ

有給男幼者。一九三九年