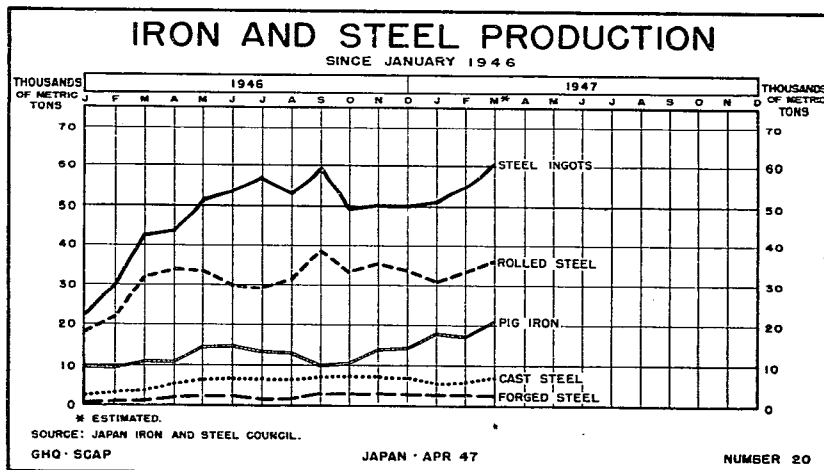


METAL INDUSTRIES

Iron and Steel

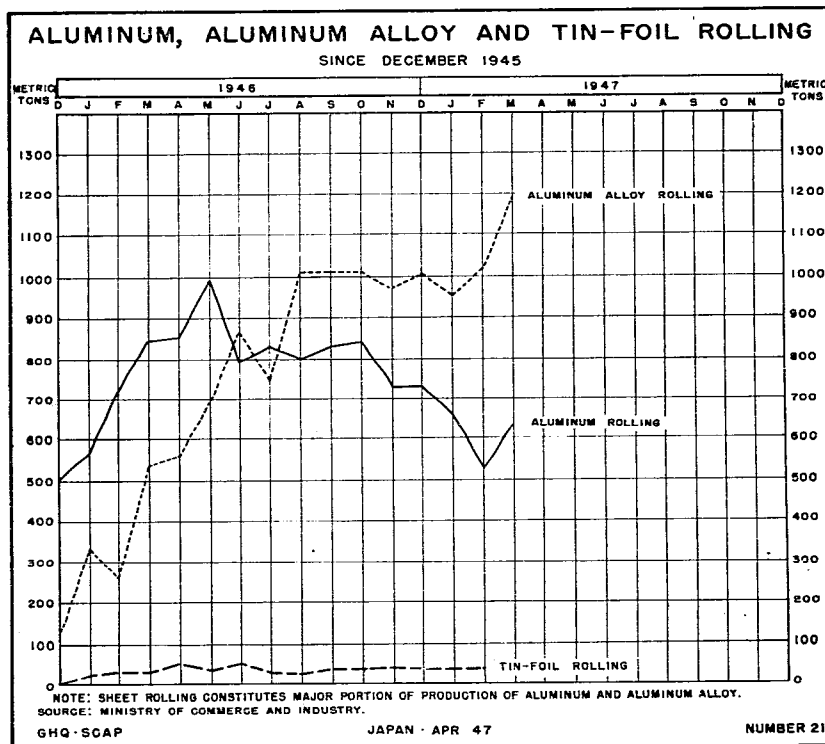
2. Increased coal deliveries to the iron and steel industry during the latter half of March were responsible for the largest monthly production of pig iron and steel ingots since the war ended. This output represents 60 percent of the minimum monthly steel production needed during 1947 for rehabilitation of coal mines, railroads, fertilizer plants and other essential industries.



Light Metals

3. Alumina produced by caustic digestion of scrap increased from 154 metric tons to 180 tons in March. Total aluminum produced in four primary and 15 secondary plants was 1,869 metric tons compared with a revised figure of 938 tons in February.

4. March production in 63 light-metal rolling plants is shown below.



Copper

5. Eight smelters produced 3,807 metric tons of blister copper and seven refineries produced 3,204 tons of refined copper, increases of 872 and 808 tons respectively based on revised February figures. Note chart at top of page 107.

6. Rolled copper and copper alloy production increased from 3,832 metric tons in February to 4,317 in March as the number of operating mills increased from 148 to 166. See chart No. 22, page 106.

Zinc and Lead

7. March distilled zinc output increased 99 tons to 422 metric tons. With the lifting of electric power restrictions electrolytic zinc production increased 215 tons to 620 metric tons. Zinc plate output of 491 metric tons increased 145 tons.

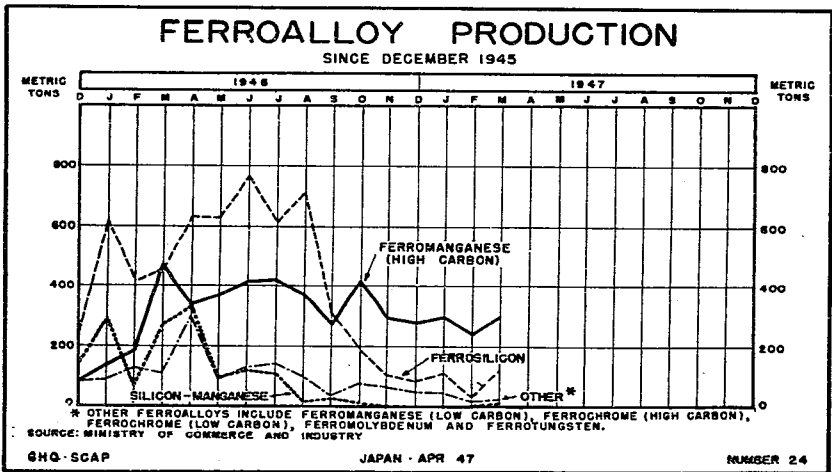
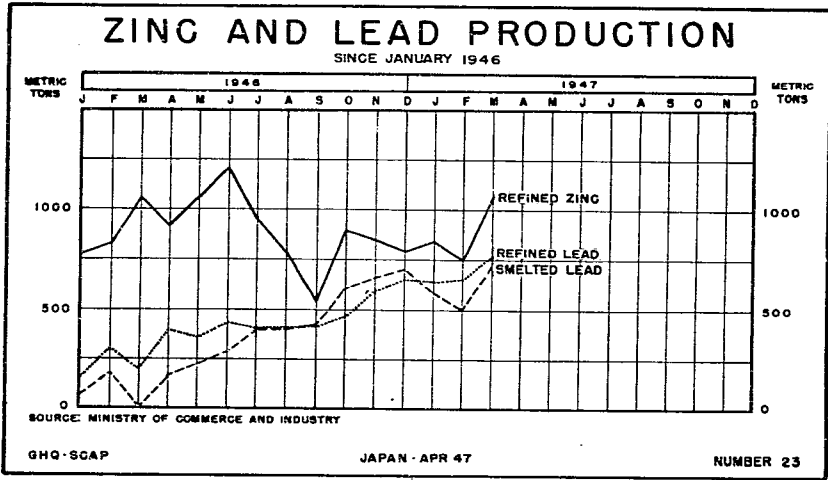
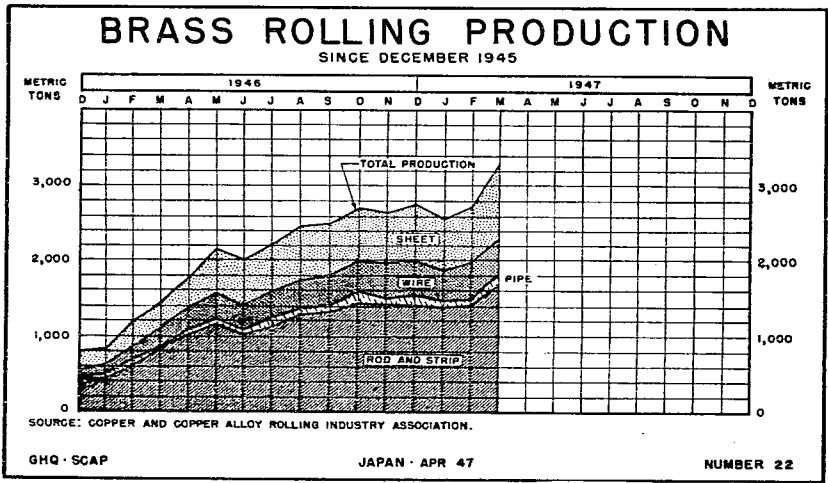
8. Lead smelting output was 724 metric tons and refined lead 766, increases of 218 and 111 respectively. See center chart, next page.

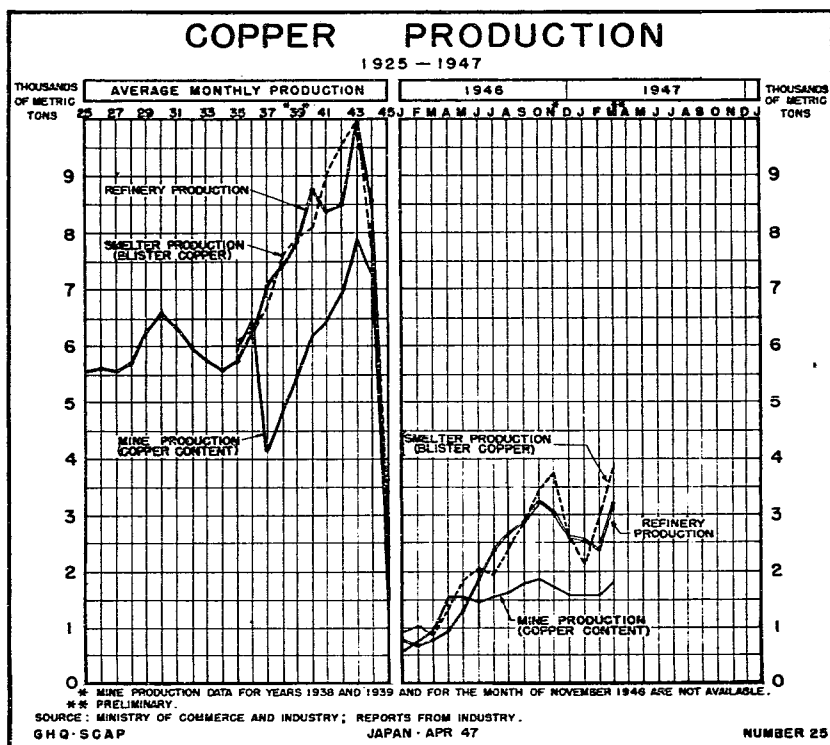
Other Nonferrous Metals

9. March mercury production amounted to 6.1 metric tons and crude tin output totaled four tons.

Ferrous Alloys

10. A 55-percent increase in ferroalloy production in March, shown on the chart at bottom of page 106, resulted from a more ample electric power supply.





RUBBER

11. Crude rubber stocks rose in March 92 percent with an increase in imports of crude rubber.

RUBBER INVENTORY (metric tons)

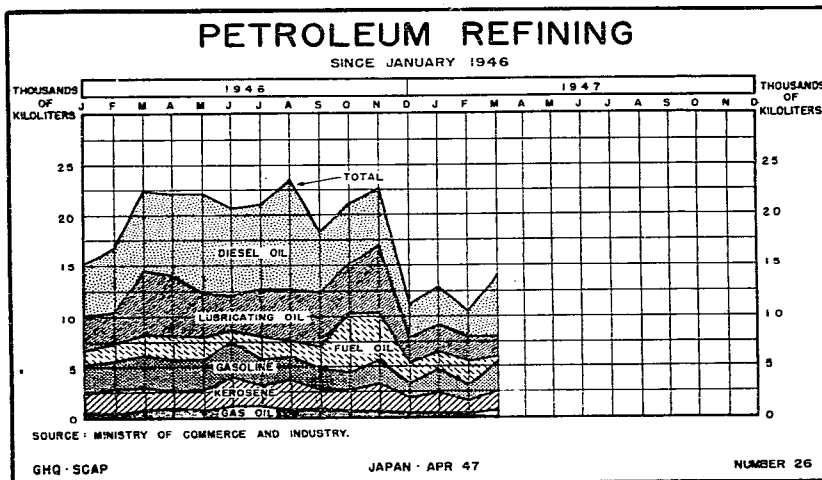
	<u>Crude Rubber</u>	<u>Latex</u>	<u>Scrap</u>
Inventory 1 March	2,791 <u>a/</u>	128	228
Receipts during month	3,904 <u>b/</u>	2	34
Consumption during month	1,328	9	228
Inventory 1 April	5,367	121	34

a/ Revised.
b/ Imported.

SOURCE: Ministry of Commerce and Industry, Rubber Control Union.

PETROLEUM

12. Crude runs to stills totaled 19,869 kiloliters in March, an increase of 3,755 over the previous month. Refined products totaled 14,029 kiloliters.

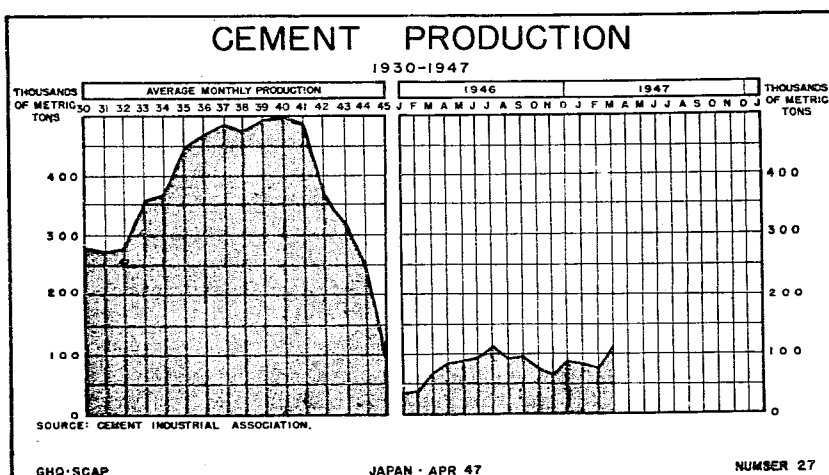


CEMENT

13. Thirty-three operating plants produced 112,086 metric tons of cement and 96,934 tons of clinker during March. The limiting factors in production were a shortage of bags and of 5,000-calorie or better coal. Estimated cement production for April is 120,000 metric tons. On 1 April the following stocks of materials were on hand at plants:

STOCKS HELD BY CEMENT PLANTS (metric tons)

Coal	32,562
Clinker	93,836
Cement	81,536
Bags (pieces)	655,321



CONSTRUCTION

Board of Reconstruction

14. The Board of Reconstruction was allocated ¥ 17,000,000 to establish an inspection system for the building industry. A total of 2,000 building inspectors will be employed ranging from 20 in such unbombed prefectures as Kagawa to 235 in Tokyo.

Coal Miners' Housing Program

15. The first coal miners' housing project which started in January 1947 involved a total of 5,380 houses. Of 3,324 which were repair jobs 2,413 are completed and occupied. Of the 2,056 houses to be constructed 1,431 are completed except for the minor fittings and 311 are occupied. The second miners' housing project to begin in May involves repair or construction of 10,700 houses in Hokkaido, 8,000 in Kyushu and 3,750 in Honshu and Shikoku.

SHIPBUILDING

16. From 10 March to 10 April shipyards completed repairs on 411 merchant vessels totaling 985,290 gross tons.

17. Between 20 March and 20 April two railway ferries totaling 6,350 gross tons were launched and two cargo vessels totaling 3,500 gross tons were completed. In this period 45 steel fishing boats totaling 4,744 gross tons were launched and 45 steel fishing vessels totaling 4,628 gross tons were completed. In addition one wooden ship of 150 gross tons was launched and six wooden ships totaling 1,350 gross tons were completed.

18. Six diesel engines were released to the Home Ministry for installation in vessels now under construction.

CHEMICAL INDUSTRIES

19. Production of chemicals increased in March as deliveries of coal and lignite improved and electric power restrictions were relaxed. Output of basic chemicals was 31 percent of estimated requirements for a balanced economy, an increase of eight percent over February. Note the charts on pages 110 and 111.

Fertilizer

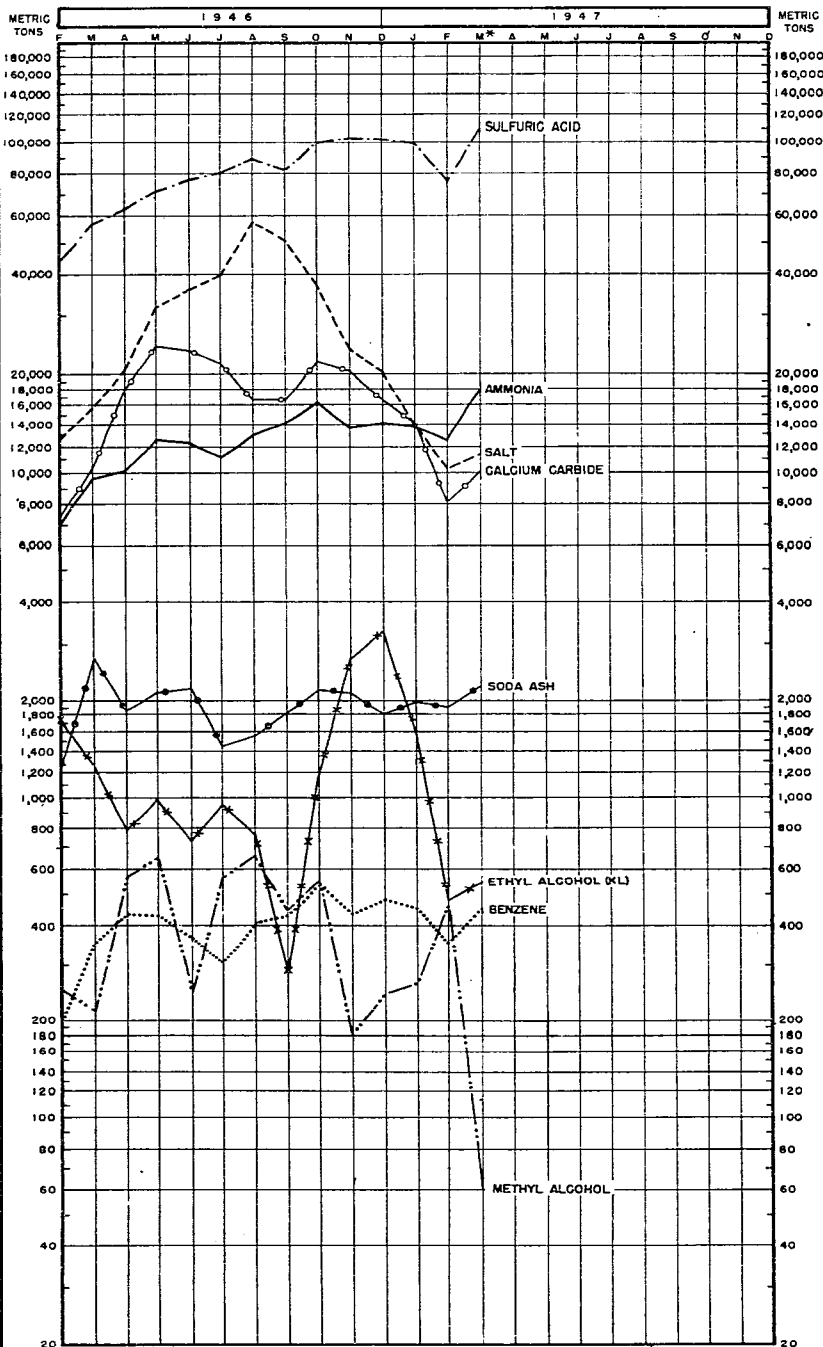
20. With increased electric power, except in Kyushu, and improved coal deliveries, ammonium sulfate output in March reached a postwar peak of 63,987 metric tons. Production amounted to about 85 percent of present capacity and was slightly less than that planned.

21. Increased calcium carbide deliveries resulted in a 35-percent rise in calcium cyanamide output in March. The 13,237 metric tons produced fell short of estimated production due to the low stocks of coke and carbide at most factories.

22. Continued slow deliveries of pyrites to phosphate plants resulted in a serious shortage of sulfuric acid for superphosphate production. A secondary limitation on production was the shortage of drying capacity for handling Angaur phosphate rock of high moisture content. Plans are being made to use drying kilns in alumina plants for the next eight months at which time the kilns now under construction at Angaur Island will be operating.

PRODUCTION OF PRINCIPAL CHEMICALS

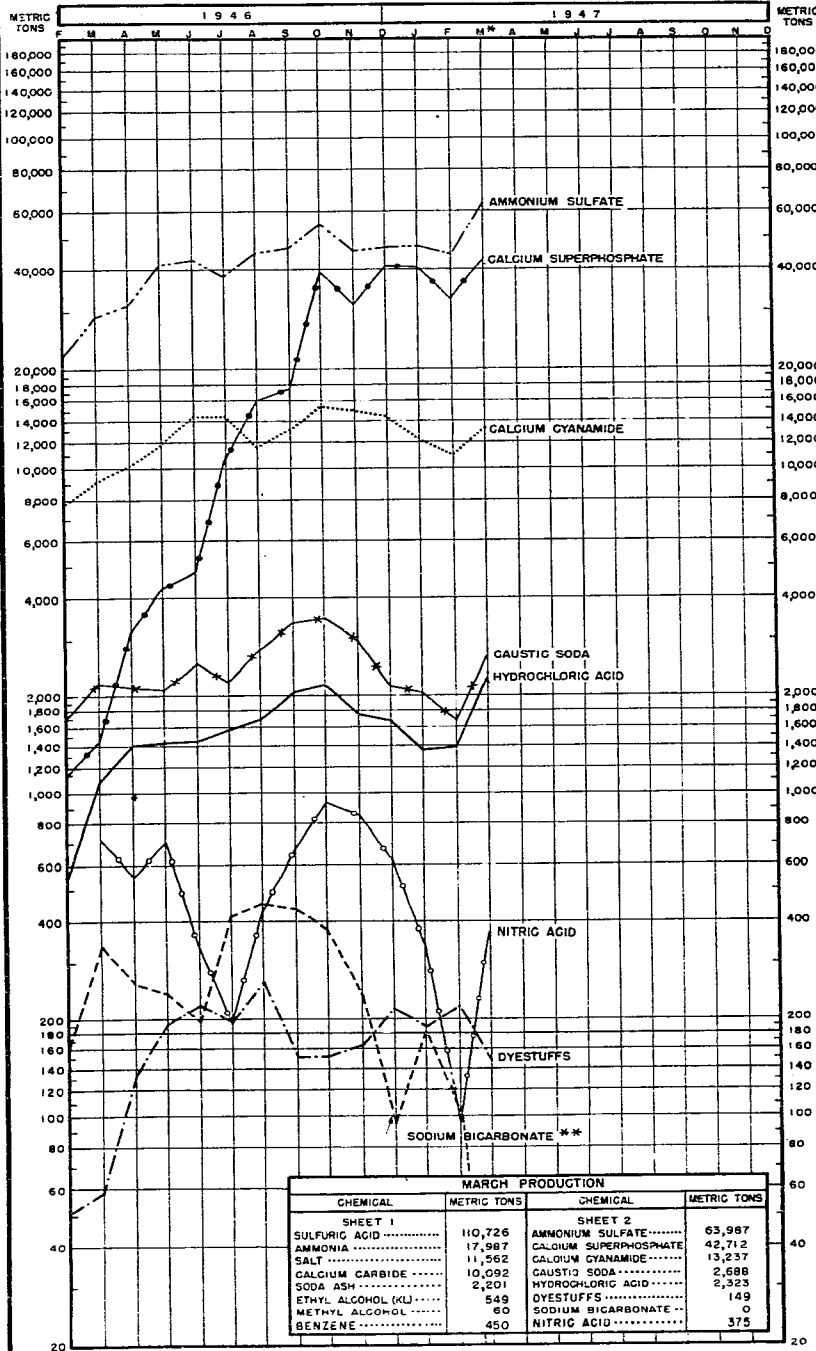
SINCE FEBRUARY 1946



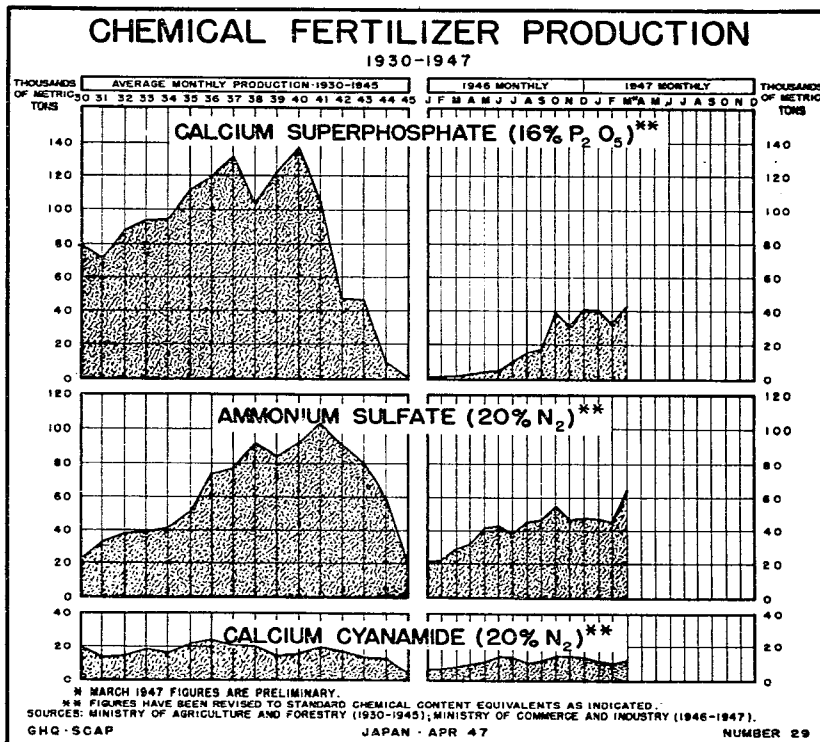
* PRELIMINARY
 NOTE: ON SEMILOGARITHMIC CHARTS EQUAL RISES OR FALLS INDICATE EQUAL PERCENTAGE CHANGES.
 SOURCE: MINISTRY OF COMMERCE AND INDUSTRY.
 GHQ - SCAP JAPAN APR 47 NUMBER 28 A

PRODUCTION OF PRINCIPAL CHEMICALS

SINCE FEBRUARY 1946



* PRELIMINARY
 ** ESTIMATED MARCH 1947 SODIUM BICARBONATE PRODUCTION = 0.
 NOTE: ON SEMILOGARITHMIC CHARTS EQUAL RISES OR FALLS INDICATE EQUAL PERCENTAGE CHANGES.
 SOURCE: MINISTRY OF COMMERCE AND INDUSTRY
 GHQ - SCAP JAPAN APR 47



Sulfuric Acid

23. March production of sulfuric acid was far short of the requirements of the fertilizer industry, the largest consumer, because of inadequate deliveries of pyrite ore. The situation improved considerably in the latter half of the month when the movement of pyrites was given the same high priority as coal and coke for the fertilizer industry and acid production reached a new monthly high of 110,726 metric tons.

Sodium Products

24. Forty-eight percent of the estimated minimum salt requirements for a balanced economy was reached in March, 57,667 tons being imported and 11,562 tons being produced locally. The indigenous production was obtained through the use of intermittently excess hydroelectric power in certain areas and the use of lignite in place of coal.

25. Increased production of electrolytic caustic soda, soda ash, hydrochloric acid and liquid chlorine in March resulted from a slightly greater coal allocation combined with increased availability of power and salt. Present production of soda chemicals is still a small percentage of requirements since continued coal shortages limit operations.

Coal-tar Products

26. The supply of coal-tar products increased as a result of a larger amount of coal coked. Efficiency and production should increase as several plants which have not been scrubbing the coke gas because of localized shortages of creosote oil began this operation in April.

27. Production of crude benzene in March was 27 percent greater than in February.

Dyestuffs

28. Production of the less desirable sulfur black and khaki colors of which considerable stocks already exist decreased in March. Raw materials were diverted to increase the production of dyestuffs currently in demand for export of finished textiles. The production of direct and acid dyes increased about 25 percent over February.

Acetylene Derivatives

29. Acetylene derivatives production decreased in March chiefly because of the limited quantity of calcium carbide available to the industry. An increase in production is anticipated in April as approximately 2,500 tons of low-grade calcium carbide received from chemical fertilizer plants will be used in the production of acetic acid and acetone.

Oil and Paint

30. March production of 281 metric tons of hardening oil more than doubled February's output but was still far below minimum needs. Paint production increased 60 percent to 1,302 metric tons. Raw material stockpiles are nearly exhausted and indigenous production of fish and vegetable oils cannot meet minimum requirements.

MACHINERY

Machine Tools

31. The number of units produced increased from 412 in February to 501 in March and orders from 285 to 757. Six companies withdrew from the Japan Machine Tool Association, converting to other types of manufacturing. See chart on top of next page.

Precision Bearings

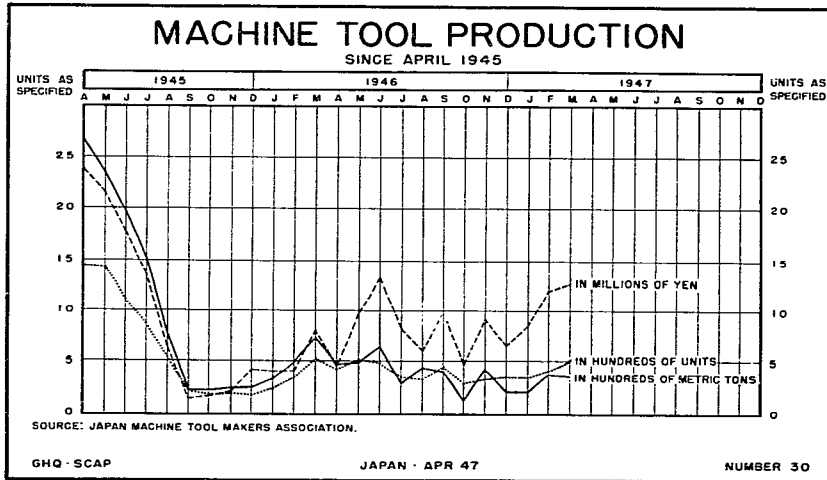
32. Value of March bearing production was ¥ 12,041,907 against ¥ 17,245,944 in February. Four plants discontinued manufacturing bearings, leaving 25 in operation.

Small Tools

33. Tool output dropped slightly in quantity and yen value. Production was up in three types: measuring tools, milling-machine cutters and threading tools.

Industrial Machinery

34. Production and repair of heavy industrial machinery and equipment in March totaled ¥ 331,659,000, an increase of 11.5 percent. Production and repair grossed 13,758 metric tons, a decrease of 12.6 percent compared with the previous month. Of this total weight 74 percent was for new units, 21 percent for parts and five percent for repair work. See the chart on page 115.



INDUSTRIAL MACHINERY PRODUCTION

(thousands of yen)

<u>Description</u>	<u>January</u>	<u>February</u>	<u>March</u>
Mining machinery	12,147	15,489	19,974
Chemical manufacturing machinery	59,425	64,464	63,281
Printing and bookbinding machinery	15,000	12,878	22,537
Rubber manufacturing machinery	5,912	3,558	8,535
Pulp and paper-making machinery	1,399	785	3,303
Food products machinery	12,408	10,563	8,045
Pumps	19,663	25,812	33,157
Crushers, mixers, pulverizers	5,683	9,635	10,129
Power transmission equipment	4,543	4,227	7,010
Foundry equipment	4,155	5,630	10,945
Conveyors	3,777	5,039	10,903
Iron and steel manufacturing equipment	5,804	11,330	12,820
Prime movers	14,927	19,695	17,248
Fans, blowers, compressors	14,687	20,172	18,290
Metal-forming equipment	14,701	18,609	18,920
Cranes and hoists	21,924	23,348	25,191
Woodworking machinery	27,766	29,779	32,394
Miscellaneous	<u>9,943</u>	<u>16,449</u>	<u>10,977</u>
Total	253,862	297,452	331,659

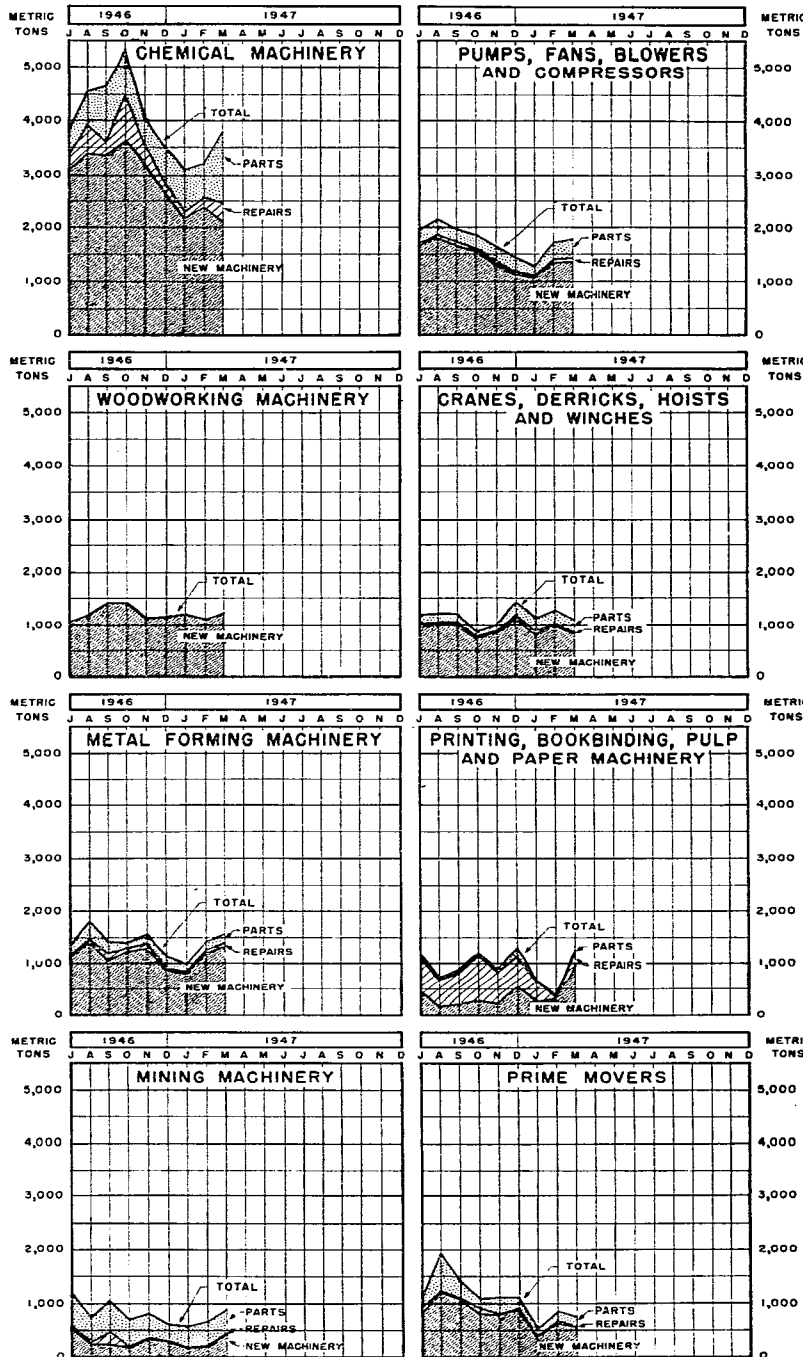
SOURCE: Industrial Machinery Association.

Textile Machinery

35. The value of textile machinery production decreased in March but parts value increased 24 percent. Gross tonnage increased slightly from 3,051 metric tons to 3,118 in March.

INDUSTRIAL MACHINERY PRODUCTION

PRINCIPAL CATEGORIES SINCE JULY 1946



SOURCE: INDUSTRIAL MACHINERY ASSOCIATION, WOODWORKING MACHINERY ASSOCIATION AND PRINTING AND BOOKBINDING ASSOCIATION.

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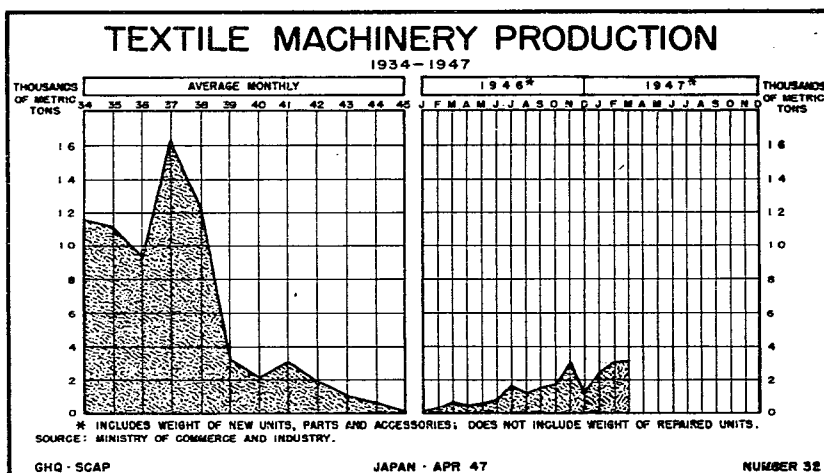
JAPAN APR 47

NUMBER 31

TEXTILE MACHINERY PRODUCTION
(thousands of yen)

	<u>February</u>	<u>March</u>
New Units	42,982	34,284
Repairs	17,498	17,003
Parts	<u>24,507</u>	<u>30,400</u>
Total	84,987	81,687

SOURCE: Japan Textile Machinery Association.



36. Production and repair value of cotton machinery in March was ¥ 57,638,000 compared with ¥ 59,005,000 in February.

COTTON MACHINERY PRODUCTION
March

	<u>New Sets</u>	<u>Repaired Sets</u>
Opener	12	10
Scutcher	9	-
Card	23	17
Drawing frame	-	10
Slubbing frame	-	6
Ring frame	-	22
Ring twister	12	5
Reeler	47	-
Winder	39	5
Loom	498	176
Other	74	53

SOURCE: Japan Textile Machinery Association.

37. March production and repair of silk machinery was ¥ 10,571,000 against ¥ 14,186,000 in February.

SILK MACHINERY PRODUCTION
March

	<u>New Sets</u>	<u>Repaired Sets</u>
Winder	108	-
Twister	20	1
Doubler winder	10	-
Warper	31	5
Loam	401	632
Other	597	85

SOURCE: Japan Textile Machinery Association.

38. Production and repair of wool and worsted machinery was ¥ 10,330,000 compared with February production valued at ¥ 8,957,000.

WOOL AND WORSTED MACHINERY PRODUCTION
March

	<u>New Sets</u>	<u>Repaired Sets</u>
Opener	38	2
Card	41	21
Mule frame	1	5
Winder	5	1
Warper	-	-
Loam	20	26
Other	177	26

SOURCE: Japan Textile Machinery Association.

SCIENTIFIC AND TECHNICAL RESEARCH

39. Japanese research reports indicate that approximately two thirds of the 3,951 projects covered in the last six months were in the field of applied science and the remainder in fundamental sciences; research work in medical schools and hospitals was not included. Of the 180 laboratories engaged in applied science, the commercial, government-operated and independent laboratories not connected with universities carried the major share of the research load. Chemical technology, with 35 percent of all projects in applied science, was the largest single field of endeavor, followed by agriculture and forestry, electrical technology, mechanical technology and metallurgy. Shortages of equipment and materials hampered serious research and kept the general quality of the work fairly low.

40. Emergency problems of short-range importance, such as saccharification and salt production, received maximum attention. Special emphasis was placed on research in new food sources and on substitutes for soap-making ingredients.

SECTION 4
MANUFACTURING

C O N T E N T S

	Paragraph
Food Processing.	1
Pulp and Paper	5
Glass and Ceramics	7
Medical Supplies	15
Electrical Manufacturing	17
Transportation Equipment	18
Rubber Manufacturing	22
Leather Manufacturing.	23
Agricultural Equipment	27
Handicrafts.	28
Miscellaneous Manufacturing.	31

FOOD PROCESSING

1. General shortages of raw materials continued. With the end of the mandarin orange packing season production of canned foods dropped sharply. Bottled food output, mainly pickled vegetables, increased slightly.

2. Premature release of bean paste was made to compensate for ration shortages. Lack of soybeans reduced bean paste in processing and in stock from 133,400 tons in March 1946 to 22,693. The soy-sauce industry is in a similar position. Bean curd (tofu) which is practically 100 percent protein has not been manufactured commercially since the fall of 1945 due to the lack of soybeans. Adulteration of soybean products with potatoes provides bulk for rations but does not meet protein ration requirements. See chart, following page.

Brewing and Distilling

3. March sake output reflects a normal seasonal increase. See chart on page 121.

Containers

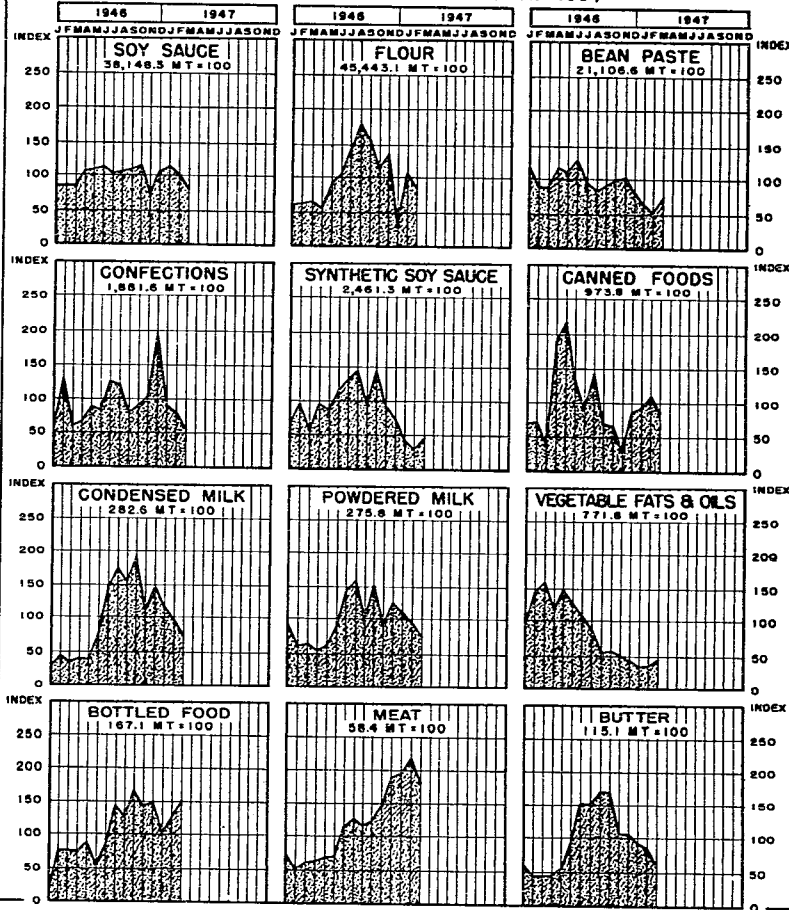
4. Container production was insufficient to meet the needs of the food industries. In March the industry consumed 360 metric tons of tin plate and 809 tons of paper and paperboard. Minimum requirements are 400 percent of present output. The fundamental shortage is the lack of steel.

PULP AND PAPER

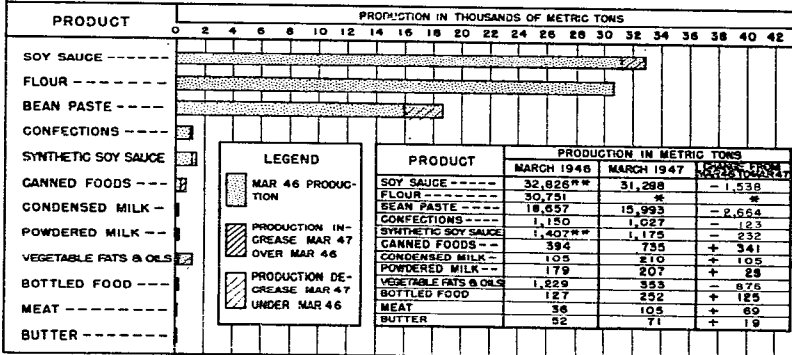
5. March paper production reached a postwar high. The

FOOD PROCESSING

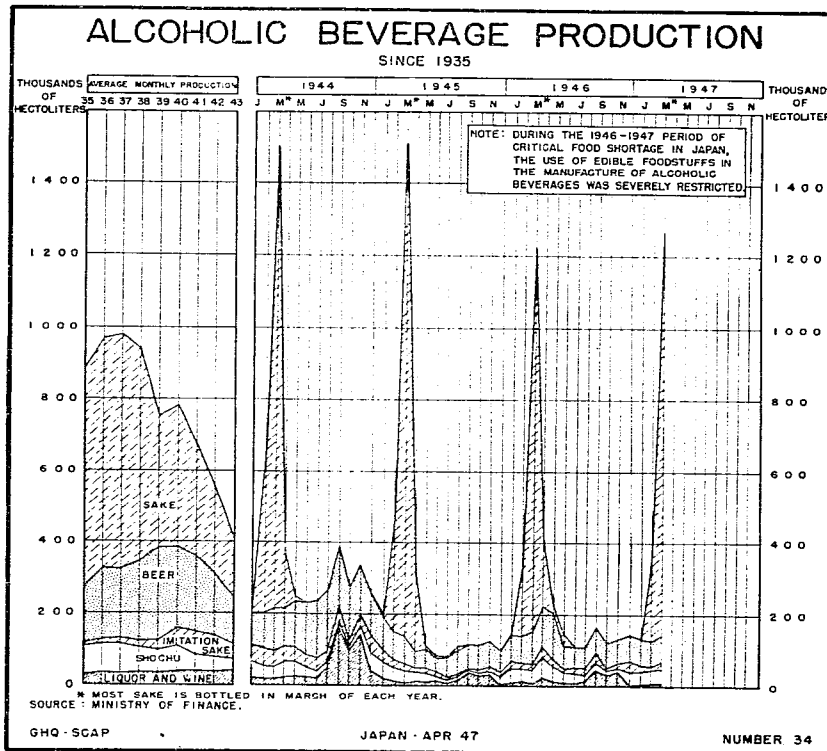
PRODUCTION INDEXES SINCE JANUARY 1946 (1946 AVERAGE MONTHLY PRODUCTION = 100)



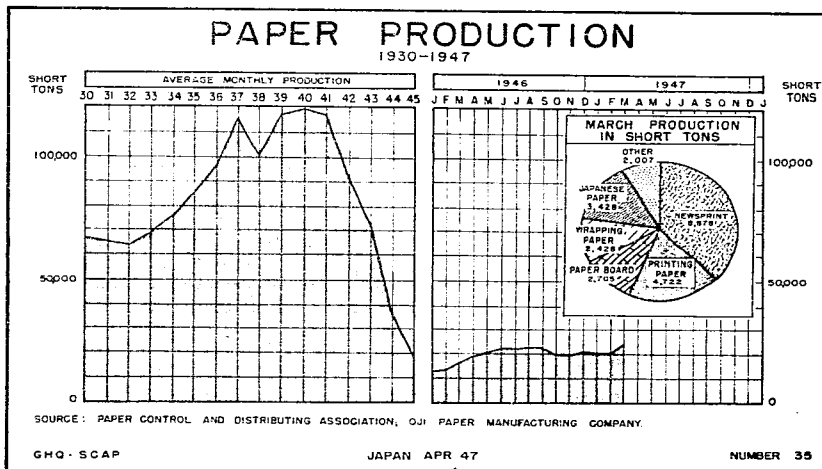
COMPARISON OF MARCH PRODUCTION IN 1946 AND 1947



* NOT AVAILABLE. ** REVISED.
SOURCE: MINISTRY OF AGRICULTURE AND FORESTRY.

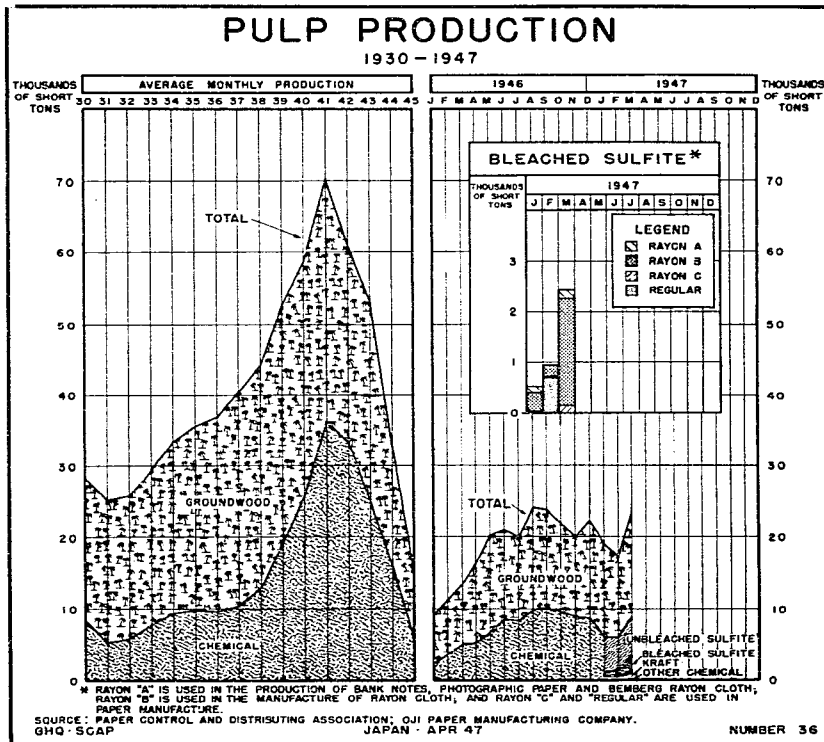


18-percent increase over February was mainly in newspaper, printing and paper bags.



6. Pulp production showed a marked increase of 36 percent over February output. Rayon B pulp, used in viscose rayon fiber production, increased almost tenfold. Unbleached kraft, critical in the manufacture of cement, food and fertilizer bags, almost tripled the February figure. Groundwood and unbleached sulfite,

important in newspaper and printing paper production, showed creditable gains.



GLASS AND CERAMICS

Glass

7. Window glass production in March increased 41 percent while output of polished plate glass increased 64 percent.

Production of optical glass was begun again with 400 kilograms produced.

Fiber glass production decreased 34 percent and output of glass wool increased 43 percent.

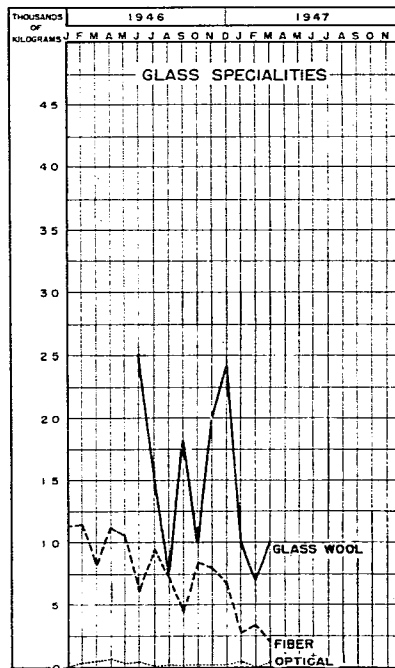
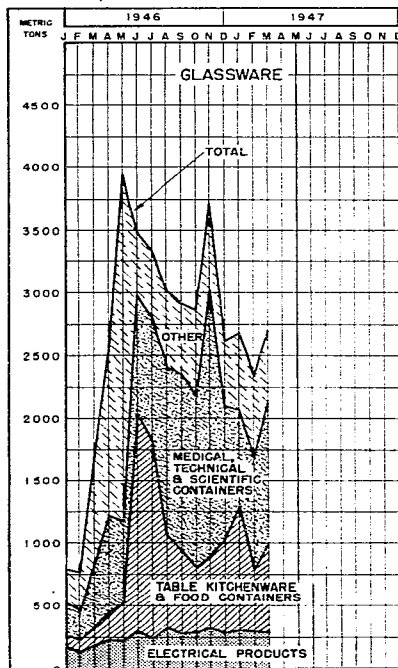
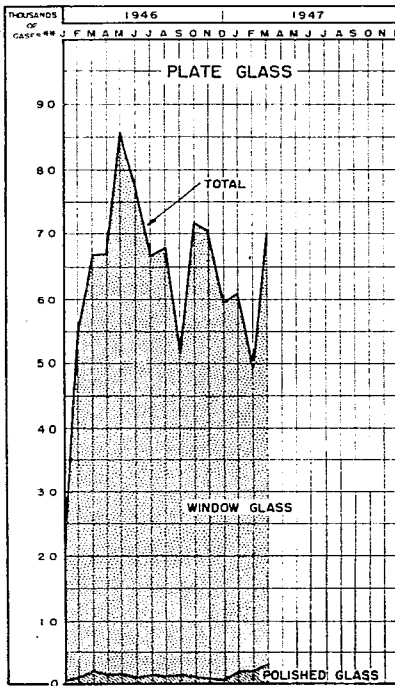
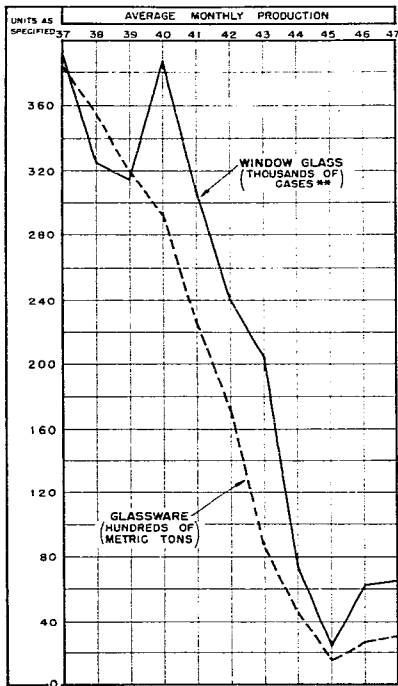
Production of all types of glassware totaled 2,711 metric tons in March, an increase of 16 percent over February.

Optical Instruments

8. Production of cameras during March decreased 37 percent from the February level; output of binoculars and opera glasses increased 153 percent and production of scientific and engineering equipment was generally below that of the previous month.

GLASS PRODUCTION

1937 - 1947



* 12-MONTH PERIOD ENDING 31 MARCH 1947.
 ** ONE CASE EQUALS 100 SQ FT OF 2 MM GLASS.
 SOURCE: MINISTRY OF COMMERCE AND INDUSTRY.
 GHQ-SCAP

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INSTRUMENT PRODUCTION

	<u>February</u>	<u>March</u>
Cameras	3,807	2,410
Projectors	171	325
Binoculars and opera glasses	1,448	3,662
Microscopes	285	323
Transits	175	105
Engineers' levels	192	267
Hand levels	20	0
Sextants	65	50
Alidades	250	200
Gas indicators	152	149
Interferometer gas indicators	100	0

SOURCE: Ministry of Commerce and Industry.

Refractory Industry

9. March production of fire-clay brick increased 15 percent as output of silica brick decreased six percent.

REFRACTORY BRICK PRODUCTION
(metric tons)

	<u>February</u>	<u>March</u>
Fire clay	9,857	11,365
Silica	1,995	1,866
Chrome	379	278
Magnesia	19	54
Corhart	188	53
High alumina	<u>188</u>	<u>103</u>
Total	12,626	13,719

SOURCE: Ministry of Commerce and Industry.

Abrasive Industry

10. March production of grinding wheels with vitreous bonds increased 15 percent. Plants in operation increased from 44 to 50. Output of wheels with elastic bonds increased 75 percent but production is still far below the minimum requirements of Japanese industry.

Production of ordinary abrasive paper increased 52 percent in March and output of waterproof paper increased 72 percent. Abrasive-cloth production maintained the February level.

ABRASIVE PRODUCTION
(metric tons)

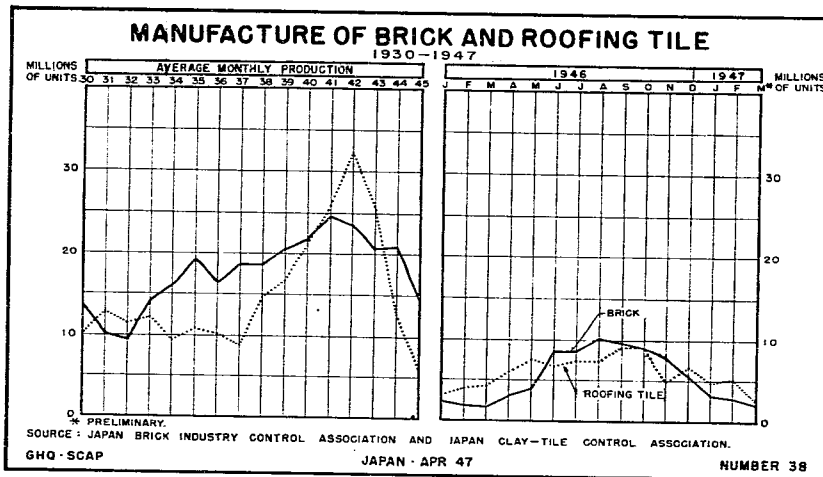
	<u>February</u>	<u>March</u>
Grinding wheels and stones		
Vitreous bond	383	441
Elastic bond	8	14
Abrasive paper and cloth (ren) <u>a/</u>		
Waterproof cloth (9x11 inches)	2,169	2,161
Ordinary paper (9x11 inches)	3,026	7,651
Waterproof paper (8½x10½ inches)	359	616
Abrasive grain		
Aluminum oxide		
Regular	85	101
White	20	10
Silicon carbide		
Regular	2	3.7

a/ One ren equals 480 sheets or their equivalent.

SOURCE: Grinding Wheel Manufacturers' Association, Japanese Abrasive Cloth and Paper Association and the Abrasive Materials Industry Association.

Structural Clay Products

11. Preliminary figures on the production of building brick and roofing tile in March show decreases of 24.5 and 53 percent respectively.



Asbestos Cement Products

12. Output of high-pressure pipe in March increased 62 percent over February. Corrugated sheet production increased 25 percent. Output of other asbestos cement products showed substantial increases.

ASBESTOS CEMENT PRODUCTS
March

	<u>Unit</u>	<u>Production</u>
Asbestos cement high-pressure pipe	metric ton	224
Concrete pipe	metric ton	4,860
Corrugated sheets	tsubo ^{a/}	59,260
Slates	tsubo	4,830
Wallboard	tsubo	54,000

^{a/} One tsubo equals 36 square feet.

SOURCE: Japan Asbestos Cement Production Association.

Vitreous Enamelware

13. March production of vitreous enamelware amounted to 191,814 pieces weighing 173 metric tons compared with 338,458 pieces weighing 338 tons produced in February. Twenty-five plants were operating in March compared with 29 in February.

Pottery and Porcelain

14. March reports were received from 64 pottery and porcelain plants and represent about 80 percent of production. Mosaic tile again accounted for the large number of items reported under "industrial ware."

POTTERY AND PORCELAIN PRODUCTION
March

	<u>Pieces</u>	<u>Weight (kilograms)</u>
Electrical insulators	5,125,229	1,155,029
Industrial ware	34,944,458	2,359,825
Laboratory ware	34,190	-
Domestic potteries	3,038,990	1,122,539
Sanitary ware	30,446	389,376

SOURCE: Porcelain and Chinaware Control Association.

MEDICAL SUPPLIES

15. Medical supply production for March was valued at ¥ 7,018,444 compared with ¥ 6,471,892 for February. These figures do not include X-ray and ultra-short-wave therapeutic apparatus.

MEDICAL SUPPLY PRODUCTION

	<u>February</u>	<u>March</u>
Ampoule cleaning apparatus	75	75
Basins, sterilizing	5,650	750
Basins, wash	200	130
Distilling apparatus	39	32
Dressing drums	555	610
Electric drying ovens	24	23
Electric incubators	71	107
Forceps	18,690	14,036
Illuminating lamps	82	121
Needles, suture	22,000	32,000

	<u>February</u>	<u>March</u>
Operating tables	91	111
Percussion hammers	200	2,750
Pneumothorax apparatus	100	100
Spatulas	200	200
Speculums	679	7,069
Sphygmomanometers	700	900
Steam inhalers	880	800
Sterilizers	1,491	916
Stethoscopes	500	2,182
Sun lamps	5	5
Surgical knives	3,143	4,105
Surgical needles	1,154,361	1,132,640
Surgical scissors	7,278	7,991
Ultra-short-wave therapeutic apparatus	100	34
Vaporizers	200	400
X-ray apparatus	112	105

SOURCE: Japan Medical Instrument Control Association.

Hypodermic Syringes

16. Output of hypodermic syringes in March increased four per cent to 401,117.

ELECTRICAL MANUFACTURING

17. To prevent illegal use and waste of tungsten wire filament future allocations will be controlled by the Ministry of Commerce and Industry, Machine Bureau, Electric Section.

The most serious difficulty in the production of electric light bulbs has been the procurement of bases. The industry now has a capacity of 7,750,000 bases per month but this production depends on the availability of brass strip.

The shortage of silicon steel and inadequate transportation to move the available steel continued to hamper production of large items.

MAJOR ELECTRICAL MANUFACTURES a/

	<u>February</u>	<u>March</u>
Motors (except railway)		
Fractional HP	3,631	3,413
Standard HP		
1-15 HP	6,471	9,246
16-100 HP	662	536
Over 100 HP	68	46
Portable tools	3,201	3,683
Other	1,785	3,287
Generators, converters and M-G sets, except turbogenerators and welders		
DC generators	379	626
AC generators	7	16
Other	1,374	1,378

	<u>February</u>	<u>March</u>
Turbogenerators		
Steam turbines for power stations	-	2
Other steam turbines	-	22
Water turbines	-	1
Transformers		
Distribution, 100 KVA and under	2,422	2,697
Power, over 100 KVA	98	79
Instrument	746	529
Other	386	391
Rectifiers		
Hot cathode	45	80
Steel tank	4	3
Mercury vapor	47	38
Selenium and other	1,055	1,667
Power condensers	1,327	3,341
Furnaces		
Arc	1	5
Low-frequency induction	7	2
High-frequency induction	2	4
Resistance	107	74
Other	43	-
Welding apparatus		
AC arc	127	53
Resistance	12	14
Control apparatus		
Hand control		
Starters	184	319
Controllers	230	359
Other	546	936
Remote control		
Contactors	372	488
Contactor panels	23	46
Resistors	104	294
Lifting devices	65	222
Other	-	241
Switchboard apparatus		
For standard motors	2,390	5,906
3,300 volts and under	1,150	1,799
Over 3,300 volts	884	583
Meters		
Watt-hour	21,588	24,104
Pyrometers	2,400	1,462
Other	32,500	35,011
Railway equipment		
Main motors	181	160
M-G sets	27	31
Blower motors	4	6
Locomotives		
Railway	2	6
Mining and industrial	2	-
Control apparatus	43	85
Battery locomotives	8	9
Battery-operated vehicles	16	36

	<u>February</u>	<u>March</u>
Railway signal equipment		
Signal mechanism	124	60
Electric levers	118	61
Interlocking relays	-	101
Switch machines	13	54
Electric locks	81	55
Circuit controllers	-	70
Line transformers	248	202
Signal transformers	355	574
Rectifiers	433	197
Approach indicators	70	350
Signal relays	1,375	1,444
Insulation materials		
Mica (kilograms)		
Moulding plate	9,232	8,002
Commutator segment	3,538	4,105
Heat-resisting plate	96	245
Flexible plate	1,463	2,274
Paper	8,046	11,387
Paper (rolls)	2,056	4,652
Varnished cloth (square meters)	95,000	73,220
Varnished tubes (meters)	898,360	607,148
Black tape (rolls)	211,296	311,550
Rubber tape (rolls)	17,887	13,095
Varnished tape (rolls)	4,570	12,273
Light bulbs		
General use <u>b/</u>	4,229,960	4,606,913
Special <u>c/</u>	243,543	253,435
Flashlight <u>d/</u>	1,107,731	860,701
Wire and cable		
Bare copper (metric tons)	925	1,525
Rubber-insulated (kilometers)	15,562	14,708
Weatherproofed (kilometers)	5,768	8,011
Cotton and silk covered (metric tons)	449	347
Enameled (metric tons)	100	90
Power cable (kilometers)	-	123
Other (kilometers)	1,112	123

- a/ All production stated in pieces unless otherwise indicated.
b/ Includes bulbs of 15 to 300 candle power.
c/ Includes bulbs over 300 candle power and special applications for railroad.
d/ Motor vehicle, flashlight and Christmas tree lamps.

SOURCE: Ministry of Commerce and Industry.

TRANSPORTATION EQUIPMENT

Truck Chassis

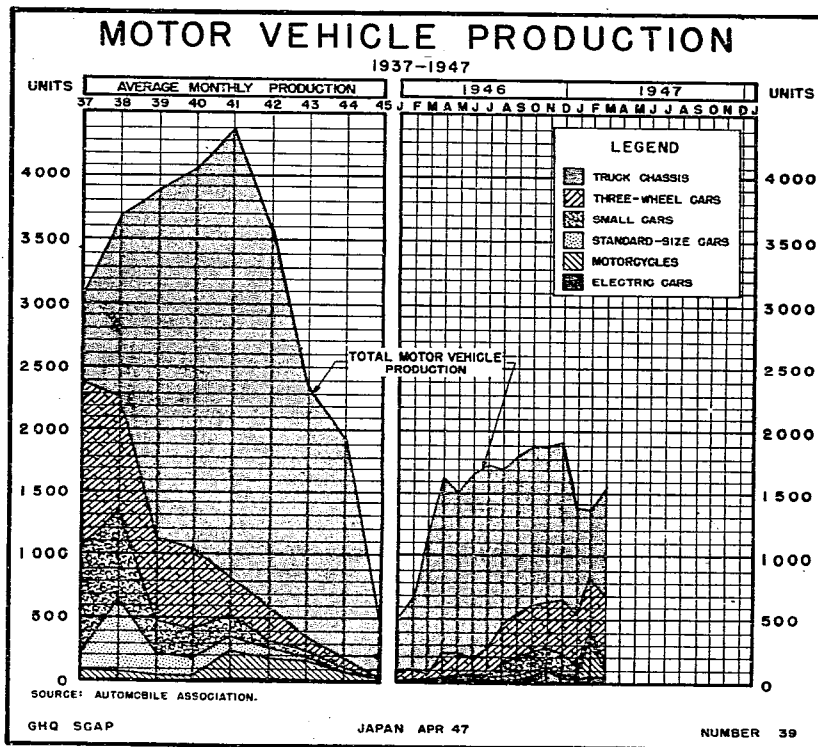
18. March truck chassis output increased 75 percent over February as the Diesel Automobile Company which had been closed by a strike resumed operation.

PRODUCTION AND DISTRIBUTION OF TRUCK CHASSIS

Maker	Stock 28 February	March Production	Total Available	Total Distributed	Stock 31 March
Toyota	305	375	680	240	440
Nissan	291	350	641	352	289
Diesel	424 a/	96	520	128	392
Mitsubishi	88	48	136	19	117
Total	1,108	869	1,977	739	1,238

a/ Revised.

SOURCE: Japan Automobile Chamber of Commerce.



Tractors

19. Tractor output in March increased 128 percent as 12 operating plants produced 201 tractors. Production of trailers dropped from 30 to 12 as only one trailer plant was operating.

Light Carts

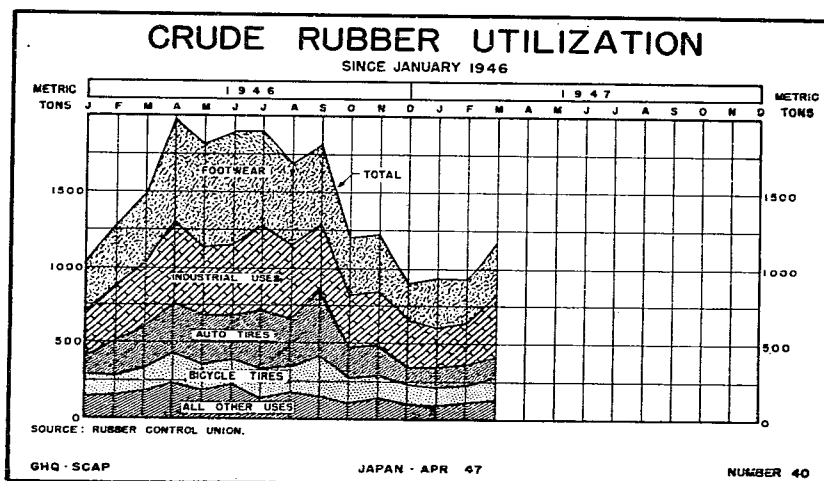
20. Light-cart manufacturers produced a total of 25,937 carts and 5,476 snow sleds during March compared with 25,685 carts and 5,512 snow sleds in February. The 3,990 reporting factories employed 19,994 persons.

Bicycles

21. The Bicycle Association reported production of 27,033 bicycles in March, compared with 11,353 in February, of which 16,075 are awaiting delivery of tires and tubes. Production of rear cars totaled 32,596 of which 26,260 lack tires and tubes.

RUBBER MANUFACTURING

22. Rubber goods production in March in terms of crude rubber consumed totaled 1,173 metric tons. The Nippon Tire Company which had been closed due to a strike was again in operation.



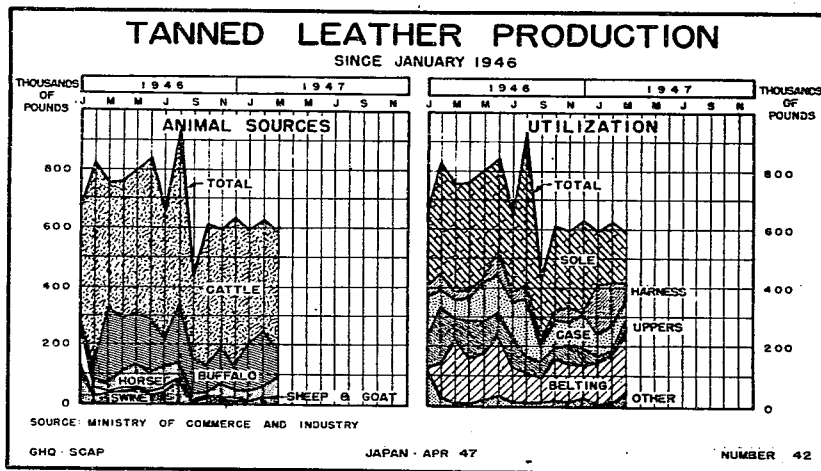
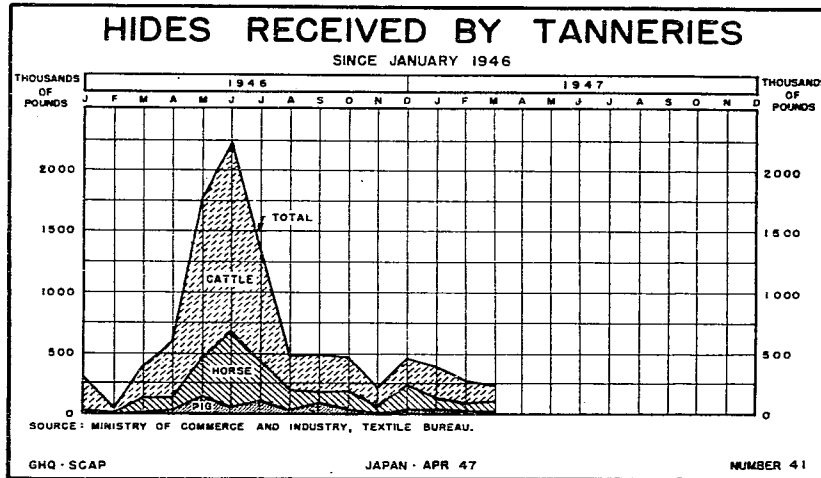
LEATHER MANUFACTURING

23. Because of delays in the effectuation of the new allocation system activity in the leather industry continued at a reduced rate during March.

24. Tanned leather production decreased 43,000 pounds below February figures as receipt of hides dropped 23,000 pounds. March stocks of tanned leather held by tanneries increased slightly over February. Note the two charts on next page.

25. Production of leather goods in March increased approximately 272,000 pounds. A large part of this increase was in belting and other industrial leather products for which a price increase was granted on 28 February. Leather goods for industrial uses totaled 332,000 pounds; footwear 453,000 pounds.

26. Manufacturers reported that 397,852 pounds of leather principally sole and belting leather, 940,165 inch-feet of machinery belting and 72,782 pairs of cut soles were produced in March from former Japanese military stocks.



AGRICULTURAL EQUIPMENT

27. Although electric power restrictions were lifted production continued to be limited by other material shortages. Increased official allocations of steel are planned for the future. The 190 reporting agricultural equipment plants employed 18,171 persons.

AGRICULTURAL IMPLEMENT PRODUCTION

	<u>February</u>	<u>March</u>	<u>Stock on Hand</u> <u>31 March</u>
Barley cleaner	284	641	779 ^{a/}
Barley-press roller	158	469	97
Cultivating hoe	158	1,720	2,739
Farm cart	220	415	145
Farm fan	250	101	93
Fertilizer grinder	0	140	63
Floss remover	318	400	1,400

	<u>February</u>	<u>March</u>	<u>Stock on Hand</u> <u>31 March</u>
Flour-milling machine	208	287	30
Fork	17,050	16,900	1,961
Grain dryer	50	0	150
Grain fan	1,632	2,501	290
Grain screen	0	265	0
Harrow	3,030	2,280	4,105
Hoe	51,634	73,506	92,041
Mower	0	8	0
Plow	24,250	20,943	26,672
Potato cutter	500	0	80,035
Pruning shears	1,100	600	600
Radish grater	600	0	-
Rice huller	945	1,221	382
Rice polisher	401	735	878 a/
Ridge scoop	1,845	1,341	465
Root cutter	70	0	0
Scattering scoop	11,619	10,680	19,129
Sickle	196,843	214,954	1,232,589
Simple weeder	2,870	2,060	12,705
Sowing machine	0	100	1,100 a/
Sprayer	10,680	16,300	1,000
Straw cutter	1,250	820	2,415
Straw cutter with feeder	4,749	5,834	2,336
Straw-mat machine	954	755	233
Straw-rope finisher	10	0	0
Straw-rope maker	5,154	7,203	2,902
Straw-softening machine	135	312	492 a/
Stump puller	40	0	0
Tea-leaf finishers	107	74	177
Tea-leaf shears	1,300	1,400	3,900
Thresher	6,575	6,994	2,282
Tobacco dryer	10	18	153
Vermicelli machine	100	95	20
Vertical pump	288	140	586
Weeder	19,230	31,868	66,186

a/ Revised.

SOURCE: Japan Agricultural Implement Industry Cooperative Union.

HANDICRAFTS

Silverware

28. March output of silverware decreased 2.2 percent under February. Forty-four factories with 1,601 employees were in operation.

SILVERWARE PRODUCTION (dozen)

	<u>February</u>	<u>March</u>
Spoons	52,364	50,851
Forks	21,789	21,057
Knives	8,381	8,795

SOURCE: Ministry of Commerce and Industry.

Lacquerware

29. Production in March decreased 12 percent from the previous month with a revised total of 4,440 operating factories employing 11,460 people. Five hundred fifty-four factories closed because their stocks of raw lacquer were exhausted.

LACQUERWARE PRODUCTION
(pieces)

	<u>February</u>	<u>March</u>
Tables (Japanese)	38,510	32,730
Tables (other)	9,900	6,930
Bowls (soup)	187,500	161,250
Bowls (other)	28,800	23,190
Trays	58,480	49,330
Boxes	42,000	33,820
Plates	127,700	104,720
Saucers	97,300	77,800
Chopsticks	182,000	191,100
Others	4,100	5,125

SOURCE: Lacquerware Association.

Pearls

30. Six factories were in operation in March with 189 employees.

PEARL PRODUCTION
(pieces)

	<u>February</u>	<u>March</u>
Necklaces	6,831	6,583
Rings	50	230
Clasps	550	-
Earrings (sets)	50	22

SOURCE: Ministry of Agriculture and Forestry,
Fisheries Bureau.

MISCELLANEOUS MANUFACTURING

Business Machines

31. During March a 142-percent increase in the production of Japanese typewriters resulted from a rise in the ceiling price. Output of teletypewriters also showed a large increase.

BUSINESS MACHINE PRODUCTION

	<u>February</u>	<u>March</u>
Japanese typewriters	270	651
Teletypewriters	1	60
Calculating machines	179	151
Mimeographs	3,007	1,033

	<u>February</u>	<u>March</u>
Rotary mimeographs	2	0
Files for mimeographs	1,400	2,000
Blueprinting machines	8	0
Cash registers	20 a/	20
Time recorders	36	0

a/ Revised.

SOURCE: Nippon Office Appliance Association.

Cosmetics and Dentifrices

32. A total of 236 cosmetic manufacturers employing 5,056 persons reported the production of ¥ 50,187,620 worth of toilet articles during March. Dentifrice manufacturers produced 688,768 kilograms of tooth powder valued at ¥ 6,336,666 and 85,975 kilograms of semipaste valued at ¥ 6,663,065.

Watches and Clocks

33. The Japanese watch and clock industry continued its production increase with March output exceeding 100,000 units for the second consecutive month. Thirty-three watch and clock plants were in operation employing 11,558 persons.

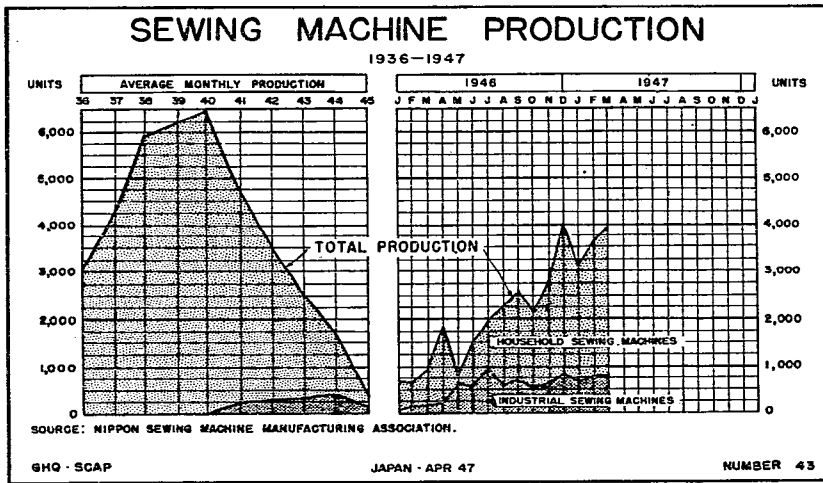
WATCH AND CLOCK PRODUCTION

	<u>February</u>	<u>March</u>
Wrist watches	14,960	17,930
Pocket watches	3,507	3,500
Alarm clocks	44,064	47,081
Table clocks	19,418	17,991
Wall clocks	18,082	16,741

SOURCE: Nippon Watch and Clock Industry Association.

Home-type Sewing Machines

34. Output of home-type sewing machines in March increased 10 percent over the preceding month. The main manufacturing bottle-necks are the shortage of coke and restrictions on consumption of electric power. Thirty-six sewing machine and parts factories were in operation.



SEWING MACHINE PARTS PRODUCTION

	<u>February</u>	<u>March</u>
Bobbin case	19,380	17,460
Shuttle	6,770	7,090
Other	144,657	116,452

SOURCE: Nippon Sewing Machine Manufacturing Association.

Light-metal Casting and Forging Industry

35. The 272 operating aluminum casting plants employing 14,768 persons showed a 14.7-percent increase in output over February. The 55 operating plants of the aluminum sheet products industry showed a 15.7-percent increase in March output.

PRODUCTION OF CAST AND FORGED PRODUCTS (metric tons)

	<u>February</u>	<u>March</u>
Cast household utensils	876	979
Other cast products	<u>484</u>	<u>580</u>
Total	1,360	1,559
Forged household utensils	289	310
Other forged products	<u>117</u>	<u>160</u>
Total	406	470

SOURCE: Light Metal Council.

Musical Instruments

36. Production of reed organs, harmonicas, accordions, guitars

and musical strings increased. One new harmonica manufacturer began operations bringing the total number of plants to 39.

Phonographs and Records

37. During March six companies were manufacturing phonographs and records. The Nippon Columbia Company, the largest producer, accounted for 85 percent of the phonograph output and 75 percent of the record production.

PHONOGRAPH AND RECORD PRODUCTION

	<u>February</u>	<u>March</u>
Phonographs	1,286	2,990
Records	338,993	406,672

SOURCE: Ministry of Commerce and Industry.

Matches

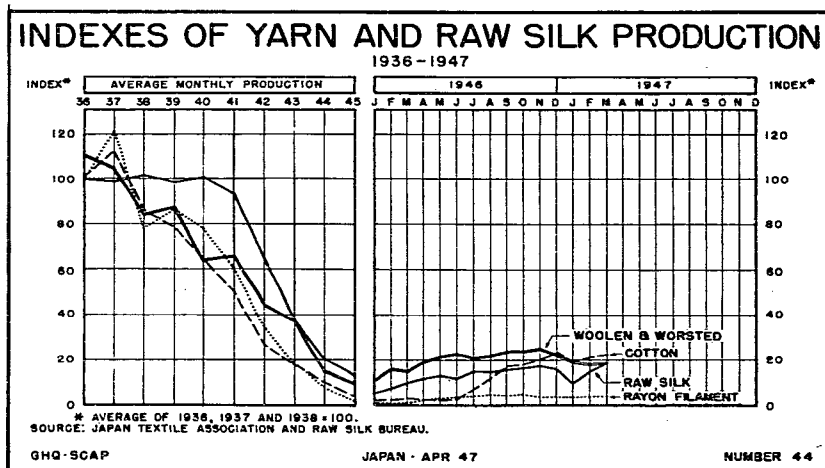
38. Match production in March totaled 16,688 match tons (one match ton equals 7,200 "full-size" small boxes), an increase of 30 percent over February. Serious shortages of glue, paraffin and paper exist.

SECTION 5
TEXTILE INDUSTRIES

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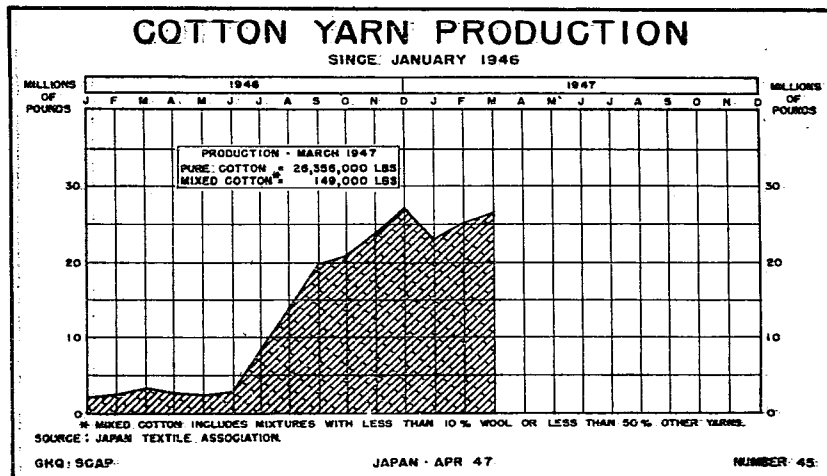
1. The general expansion in the textile industry in March was most outstanding in raw silk production which reached a new postwar peak.



COTTON

Spinning

2. Production of pure cotton yarn increased from 25,041,000 pounds in February to 26,356,000 in March and mixed cotton yarns from 67,000 pounds to 149,000.



A moderate increase in available electric power and a considerable increase in the number of workers employed were the principal factors in the expanded yarn production.

3. Big Ten spinners reported 47,237 operators at work in the spinning sections of their mills on 31 March and 22,397 in the weaving sections, a total increase of 4,063 workers over 28 February.

YARN STOCKS (thousands of pounds)

	<u>28 February</u>	<u>31 March</u>
Pure cotton		
Spinners and weaving affiliates	39,983	41,096
Independent cotton weavers	13,070	14,380
In dealers' hands	85	532
Mixed yarns a/		
Spinners and weaving affiliates	210	211
Independent cotton weavers	604	487
In dealers' hands	38	98

a/ Includes 1/2 rayon staple and other mixtures.

SOURCE: Japan Textile Association.

Cotton Supplies

4. The spinning mills reported receipt of 24,519,000 pounds of raw cotton in March, compared with 23,497,000 in February, and that 31,115,000 pounds were consumed compared with 28,242,000 in February. On 30 March there was a stock on hand of 72,465,000 pounds.

5. The ratio of cotton consumed to yarn produced showed a considerable increase in March. This was accounted for by cotton in process on additional cards, drawing frames and roving frames placed in operation during the month. The expansion was required to supply more semiprocessed raw material for the scheduled increase in cotton yarn spinning.

6. The Japan Cotton Importers' Association reported 849,257 bales of raw cotton listed on manifests of ships which had arrived in Japan through the end of March, but actual discharges totaled 849,111 bales leaving 146 bales shortlanded. Of the bales discharged, 595,744 bales were released for spinning and the remaining 254,367 bales were in interim storage or in transit at the end of the month.

7. The original schedule of the Commodity Credit Corporation Cotton Program which provided 890,000 bales of raw cotton for Japan was revised to 905,771 bales.

A shipment of 8,461 bales of raw cotton which was made from Japan's stockpile to Korea to relieve an acute shortage will be replaced from the United States.

Spindles

8. There was an increase of 102,178 operating spindles in March.

COTTON SPINDLES

	<u>February</u>	<u>March</u>
Installed	2,671,844	2,722,044
Operable	2,585,788	2,595,240
Operating <u>a/</u>	2,036,428	2,138,606

a/ Actual number of spindles operating converted into terms of two-shift basis.

SOURCE: Japan Textile Association.

9. March spindle output per working day of two shifts was .613 pounds of raw cotton converted to 20s yarn compared with .6 in January and .604 in February. Spinners attributed this improvement to higher spindle speeds made possible by increased skill of workers.

Mills

10. Production quotas were met by 56 of the 59 mills operating in March.

Weaving

11. Cotton fabric production was 51,723,000 square yards in March, an increase of 3,537,000 over February. See chart on the next page.

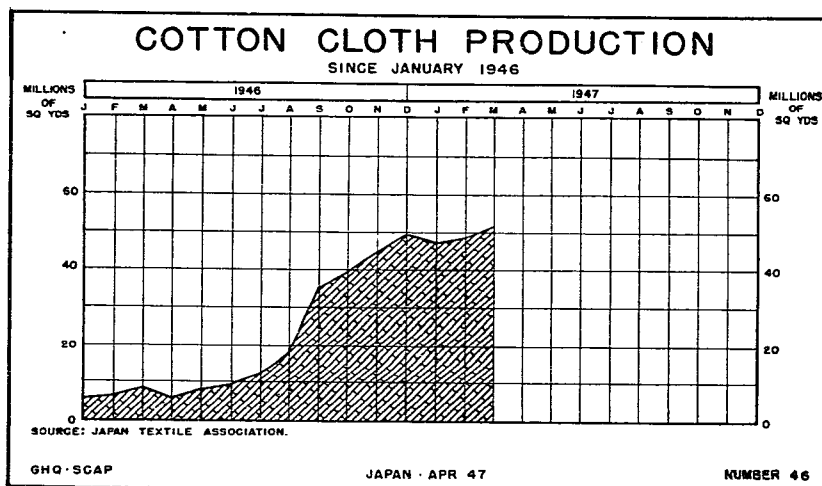
CLOTH STOCKS (thousands of square yards)

	<u>28 February</u>	<u>31 March</u>
Weavers <u>a/</u>	82,904	88,869
Independent weavers	53,064	58,892
Cloth Distribution Company		
Receipts	2,079	1,999
Disposition	6,221	3,019
Month-end stocks	16,175	17,740 <u>b/</u>

a/ Weaving subsidiaries of spinning companies.

b/ Includes 3,485,130 square yards added, based on annual physical inventories.

SOURCE: Japan Textile Association and Japan Cloth Company.



Looms

12. Slightly relaxed electric power restrictions in some areas and an improved labor supply enabled weavers to put 2,195 additional looms into operation in March.

LOOMS

	<u>February</u>	<u>March</u>
Installed	142,122	146,250
Operable	125,080	130,861
Operating <u>a/</u>	77,646	79,841

a/ Spinning companies, two-shift basis. Independent weavers, one shift, approximately 10 hours.

SOURCE: Japan Textile Association.

SILK

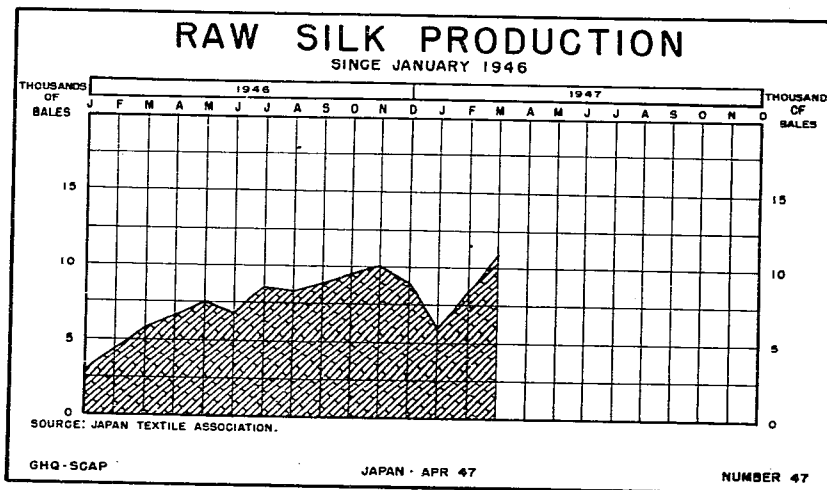
Reeling

13. Production of raw silk, shown on chart on opposite page, reached a new postwar peak of 10,849 bales in March, exceeding the previous peaks reached in November by 831 bales and February's output by 2,597 bales.

14. The principal factors in the expanded reeling operations were increased fuel supplies and the removal of electric power restrictions.

Mills and Machinery

15. Filatures had 33,115 reeling basins in operation at the end of March, an increase of 1,402 over February. An additional 953 basins were made operable during the month, increasing the total to 39,826.



16. There were 259 filatures in operation at the end of March out of a total of 272 operable mills, compared with 249 operating out of 267 operable in February. A total of 293 filatures were registered with the Ministry of Agriculture and Forestry.

Cocoon Stocks

17. There were 11,068,000 pounds of cocoons consumed during March leaving a stock on hand in mills of 94,700,000 pounds of reelable cocoons, fresh weight.

Silk Testing

18. Yokohama and Kobe raw silk conditioning houses tested 13,793 bales of freshly reeled silk for export during March compared with 11,175 in February. The average grades of raw silk tested were AA for 13/15 denier, the same as in February, and B for 20/22, an improvement of one grade over February.

19. Filatures reported that their production of 13/15 denier during the month dropped from 36.9 percent to 30.6 percent of the total production of raw silk.

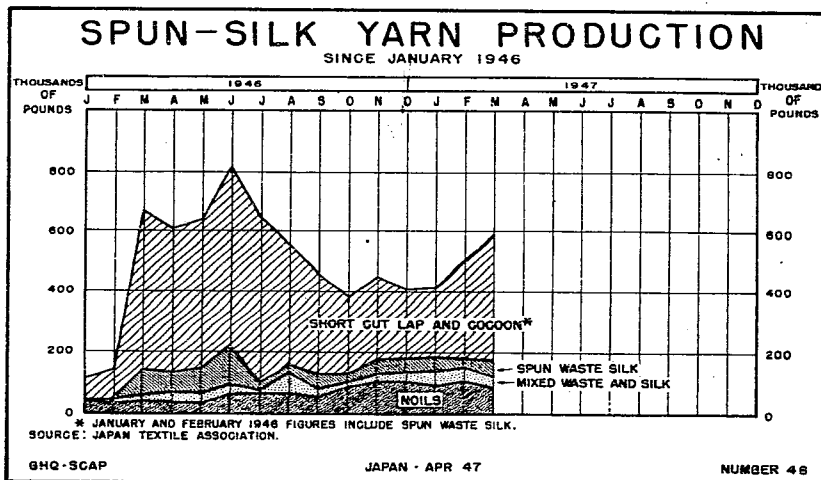
Silk Stocks

20. Filatures had 10,801 bales of raw silk on hand at the end of March. Distributing agencies had 113,388 bales on hand, an increase of 7,665 bales. This stock included 76,887 bales earmarked for export compared with 68,707 at the end of February.

Spinning

21. Relaxation of the electric power restriction enabled silk spinners to put 23,261 additional spindles into operation making a total of 133,568 spindles in operation at the end of March.

22. Spun-silk yarn production increased from 507,000 pounds in February to 591,000 in March.



RAW MATERIALS (thousands of pounds)

	<u>Consumption</u>		<u>Stocks</u>	
	<u>February</u>	<u>March</u>	<u>28 February</u>	<u>31 March</u>
Waste silk	305	231	2,660	2,623
Cut staple.	485	628	9,998	9,021

SOURCE: Japan Textile Association.

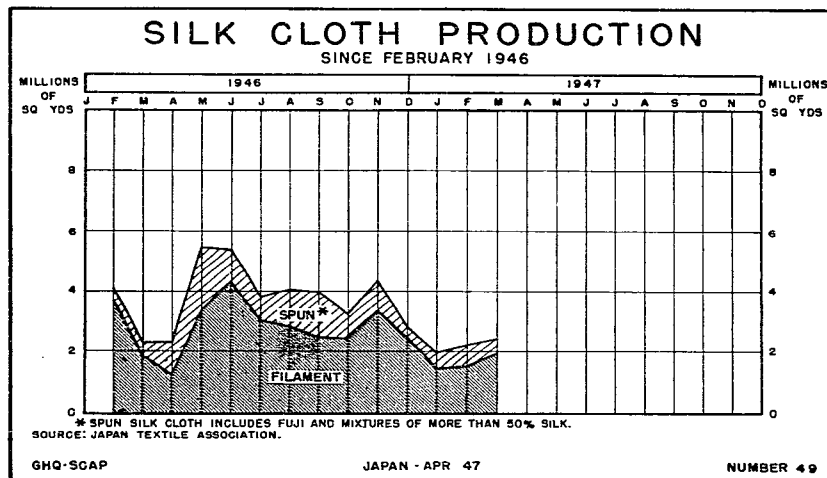
SPUN-SILK YARN STOCKS (thousands of pounds)

	<u>28 February</u>	<u>31 March</u>
Spun waste silk	585	520
Mixed waste silk and rayon staple fiber	145	169
Silk noils	313	268
Cut staple	1,437	1,475

SOURCE: Japan Textile Association.

Weaving

23. Silk weavers expanded production from 1,510,000 square yards in February to 1,954,000 in March as a result of the increased supply of electric power. The mills were still working on a program begun in May 1946 which included production of fabrics for export from 55,000 domestic bales of raw silk. Production of fuji silk and other fabrics amounted to 514,000 square yards, compared with 728,000 in February.



CLOTH STOCKS
(thousands of square yards)

	<u>28 February</u>	<u>31 March</u>
Silk	17,377	14,500
Fuji silk and others	2,627	2,276
Silk (Cloth Distribution Company)		
Receipts	6,619	8,821
Disposition	4,591	13,190
Month-end stock	32,937	28,568

SOURCE: Japan Textile Association and Japan Cloth Company.

RAYON

Raw Materials and Fuel

24. March deliveries of coal, pulp and caustic soda partially relieved the critical shortages of these materials that have existed since the first of the year.

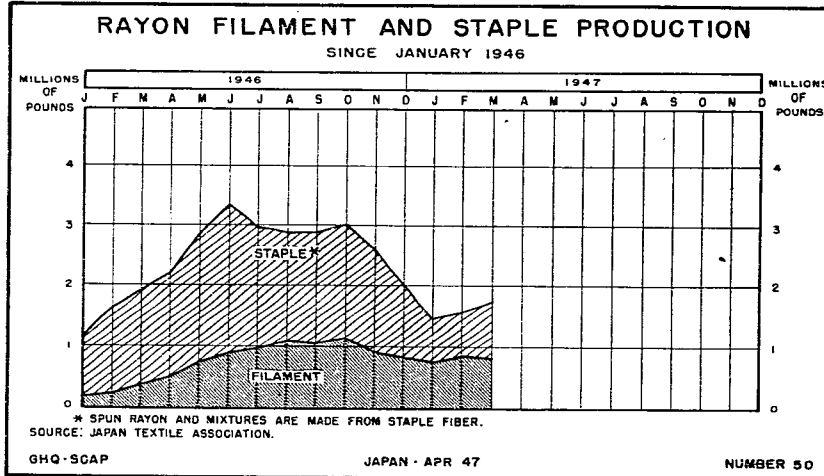
25. Receipts of caustic soda increased from 355 metric tons in February to 368 in March. Month-end stocks increased from 604 metric tons to 685 but were still below a safe minimum.

26. March rayon pulp production was approximately 10 times February's output. Rayon mills received 1,454 metric tons compared with 766 the previous month. Stocks were increased from 862 metric tons at the end of February to 1,237 on 30 March but were still below the minimum operating reserve necessary to maintain even the present reduced production volume. Considerable quantities of pulp were in transit to the mills on 30 March.

27. Rayon mills received 13,026 metric tons of coal, compared with 11,660 in February. The month-end stock was 6,461 metric tons, an increase of 765 over February.

Filement and Staple Production

28. Production of filement rayon yarn was 823,000 pounds compared with 855,000 in the previous month, while staple output was 945,000 pounds against 730,000.



FILAMENT YARN STOCKS IN MILLS
(thousands of pounds)

	<u>28 February</u>	<u>31 March</u>
Rayon mills	3,934	3,858
Weavers	4,961	4,754
Other manufacturers	1,581	1,547

SOURCE: Japan Textile Association.

Spinning

29. Relaxed restrictions on consumption of electric power enabled the spinners to increase spun-rayon yarn production from 858,000 pounds in February to 919,000 pounds in March.

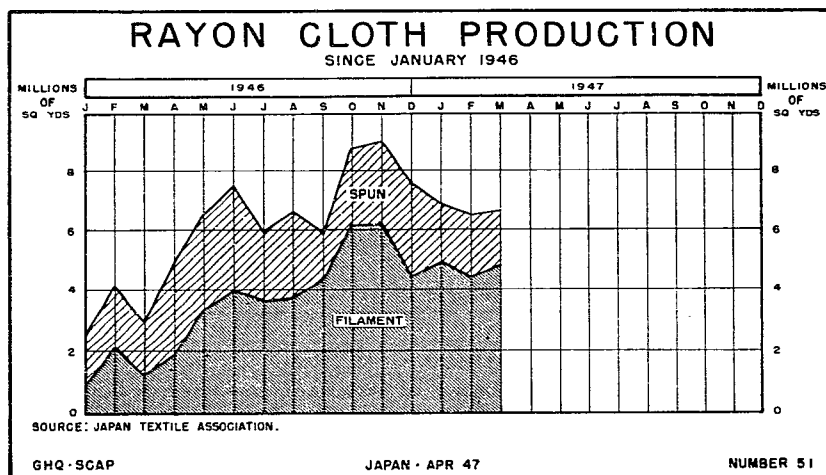
SPUN-RAYON YARN STOCKS
(thousands of pounds)

	<u>28 February</u>	<u>31 March</u>
Spinners	5,239	5,049
Independent weavers	2,355	2,246
Other manufacturers	325	302
In dealers' hands	21	20

SOURCE: Japan Textile Association.

Weaving

30. Filament rayon fabric production increased 402,000 square yards in March and most of the 4,836,000 square yards woven during the month will be offered for export. Spun-rayon cloth output showed a 300,000-square-yard decline in March production.



CLOTH STOCKS
(thousands of square yards)

	<u>28 February</u>	<u>31 March</u>
Mills		
Rayon	27,912	28,272
Spun rayon	7,509	7,008
Cloth Distribution Company		
Rayon		
Receipts	321	794
Distribution	2,033	1,286
Month-end stock	10,678	10,186
Spun Rayon		
Receipts	2,188	1,090
Distribution	3,718	2,213
Month-end stock	17,474	15,746 a/

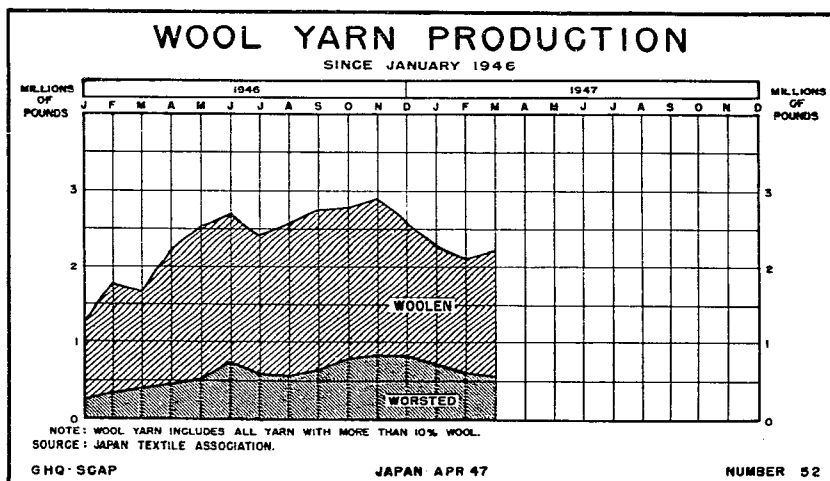
a/ 605,068 square yards deducted after annual reinventory.

SOURCE: Japan Textile Association and Japan Cloth Company.

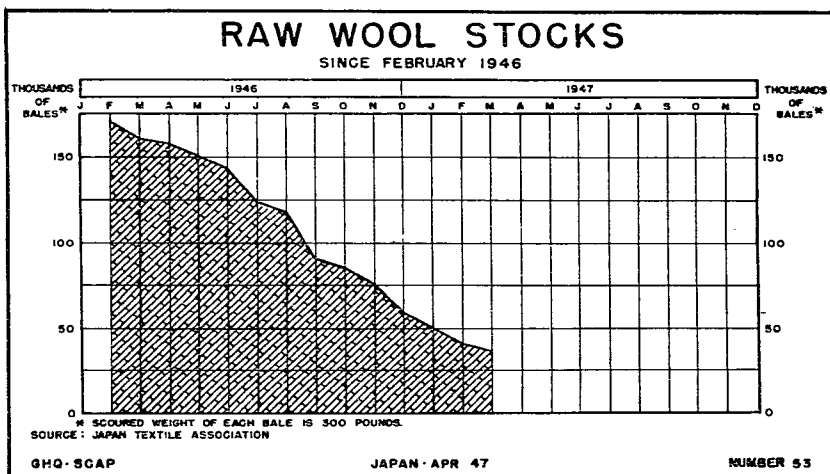
WOOL

Spinning

31. Production of woolen yarn increased from 1,527,000 pounds in February to 1,660,000 in March but worsted output declined from 609,000 pounds to 557,000. Spinners stated that the 52,000-pound reduction in worsted yarn products did not represent any reduction in the operation of worsted machinery but was the result of a shift to finer count yarns for export.



32. There were 5,601 bales of raw wool consumed during the month, leaving stocks of 36,369 bales on hand on 30 March.



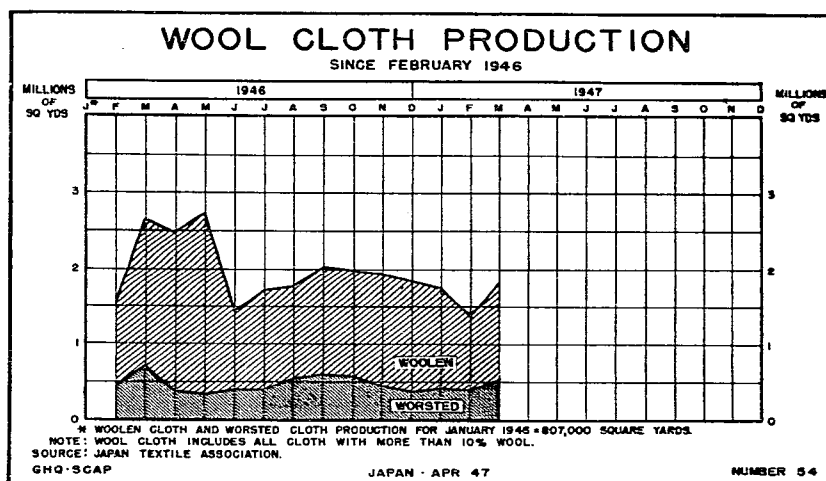
YARN STOCKS IN MILLS (thousands of pounds)

	<u>28 February</u>	<u>31 March</u>
Woolen		
Spinners	2,745	2,752
Weavers	1,133	1,316
Worsted		
Spinners	2,099	2,115
Weavers	374	328

SOURCE: Japan Textile Association.

Weaving

33. March production of woolen fabric was 1,288,000 square yards, an increase of 303,000 over February, and worsted fabric production was 518,000 square yards, an increase of 390,000.



34. There was a 30-percent gain in operating looms in March as a result of the increased electric power available.

LOOMS

	<u>February</u>	<u>March</u>
Installed	10,819	10,819
Operable	10,498	10,498
Operating	2,370	3,081

SOURCE: Japan Textile Association.

CLOTH STOCKS
(thousands of square yards)

	<u>28 February</u>	<u>31 March</u>
Mills		
Woolen	2,900	2,703
Worsted	1,130	948
Cloth Distribution Company		
Receipts	1,009	338
Distribution	1,108	686
Month-end stocks	1,751	1,403 ^{a/}

^{a/} 1,247 square yards deducted after annual re-inventory.

SOURCE: Japan Textile Association and Japan Cloth Company.

Cards and Spindles

35. Spinners reported that the increased electric power supply permitted expanded spinning-machinery operations.

SPINNING MACHINERY

	<u>Wool Cards</u>		<u>Worsted Spindles</u>	
	<u>February</u>	<u>March</u>	<u>February</u>	<u>March</u>
Installed	438	442	422,998	431,747
Operable	409	412	368,363	374,523
Operating <u>a/</u>	253	258	104,250	108,591

a/ Operating spindles converted into terms of two-shift basis.

SOURCE: Japan Textile Association.

HARD AND BAST FIBERS

Cordage

36. Receipt of raw materials by the twisting mills showed a general increase, particularly in domestic fibers. Rope and other cordage regained the losses sustained in February.

Spinning

37. Production of flax and ramie yarns declined in March despite increased receipts of these fibers.

38. Production of jute yarns showed an increase for the month even though fiber supplies were reduced. The yarns spun contained a larger proportion of substitutes.

RAW MATERIALS (thousands of pounds)

	<u>Stocks</u>	<u>Receipts</u>	<u>Consumed</u>	<u>Stocks</u>
	<u>28 February</u>	<u>March</u>	<u>March</u>	<u>31 March</u>
Sisal	628	6	120	514
Jute	1,532	129	175	1,486
Ramie and China grass	306	188	250	244
Flax	9,127	2,538	1,202	10,463
Hemp				
Domestic	5,649	718	732	5,635
Manchurian	1,109	259	176	1,192
Manila	646	95	143	598
Maolan <u>a/</u>	707	785	560	932
Bamboo	383	51	62	372
Kanpon <u>b/</u>	43	0	0	43

a/ New Zealand fiber.

b/ A species of Manchurian hemp.

SOURCE: Japan Textile Association.

SPINDLES OPERATING

	<u>February</u>	<u>March</u>
Flax	27,953	27,535
Ramie and hemp	21,310	20,244
Jute	3,064	3,230

SOURCE: Japan Textile Association.

SPINNING PRODUCTION
(thousands of pounds)

	<u>February</u>	<u>March</u>
Flax	754	720
Ramie and China grass	358	333
Jute	140	179
Rope	1,213	1,667
Cord	3	4
Fish-net twine	200	256

SOURCE: Japan Textile Association.

YARN STOCKS IN MILLS
(thousands of pounds)

	<u>28 February</u>	<u>31 March</u>
Flax	3,102	2,087
Ramie and China grass	1,383	827
Jute	299	278
Rope	1,638	1,929
Cord	0	1
Fish-net twine	170	151

SOURCE: Japan Textile Association.

Weaving

39. There was a decrease in production in all branches of the hard and bast fiber weaving industry.

LOOMS OPERATING

	<u>February</u>	<u>March</u>
Flax, hemp and ramie	3,011	2,829
Jute	43	26

SOURCE: Japan Textile Association.

CLOTH PRODUCTION AND STOCKS
(thousands of square yards)

	<u>Production</u>		<u>Stocks</u>	
	<u>February</u>	<u>March</u>	<u>28 February</u>	<u>31 March</u>
Flax	968	956	2,053	1,925
Ramie and hemp	535	323	1,609	1,406
Jute	144	28	118	8

SOURCE: Japan Textile Association.

MISCELLANEOUS

Spinning

40. Throstle yarn production increased from 247,000 pounds in February to 330,000 in March. This reversed the trend which was started by the seasonal return of workers to harvest rice crops in November and was later influenced by the electric power shortage.

Weaving

41. Production of throstle fabrics declined from 459,000 square yards in February to 379,000 in March, while production of reprocessed fabric and others increased from 626,000 square yards to 742,000. Yarn for the weaving of the reprocessed fabric was withdrawn from stock as there has been no production of these yarns since the withdrawal of the cotton spinners from the field several months ago.

THROSTLE SPINDLES

	<u>February</u>	<u>March</u>
Installed	1,106,018	1,106,018
Operable	943,534	953,446
Operating	814,080	822,784

SOURCE: Japan Textile Association.

YARN AND CLOTH STOCKS

	<u>28 February</u>		<u>31 March</u>	
	<u>Yarn a/</u>	<u>Cloth b/</u>	<u>Yarn a/</u>	<u>Cloth b/</u>
Throstle	685	660	649	512
Reprocessed	323	474	291	416
Others (mixed)	1,626	1,803	1,938	1,689

a/ Thousands of pounds.

b/ Thousands of square yards.

SOURCE: Japan Textile Association.

KNIT GOODS

42. Improved availability of electric power permitted the knit-goods manufacturers to increase production of gloves and

underwear, while there was a slight decrease in output of hosiery because of the reduction in wool stocks allocated to the manufacture of this article.

43. The manufacture of singlets for export increased from 70,984 dozen in February to 83,842 in March.

44. The knitters reported that 89 percent of the 2,030,000 pounds of cotton yarn allocated to them for the quarter was received but that delivery of other yarn was irregular.

45. Delivery of gloves has been slowed down pending revision of ceiling prices.

KNIT-GOODS PRODUCTION AND STOCKS
(thousands of dozen)

	Production <u>February</u>	Stocks 28 <u>February</u>	Production <u>March</u>	Distrib- ution <u>March</u>	Stocks 31 <u>March</u>
Underwear	147 <u>a/</u>	127 <u>a/</u>	190	151	166
Stockings	206	907	188	147	948
Gloves	45	136	48	57	127

a/ Revised.

SOURCE: Japan Textile Association.

YARN CONSUMPTION AND STOCKS
(thousands of pounds)

	On Hand <u>28 February</u>	Receipts	Consumed	On Hand <u>31 March</u>
Cotton	524	1,360	1,157	727
Mixed cotton	85	2	25	62
Rayon	839	151	153	837
Spun rayon	181	57	67	171
Raw silk	179 <u>a/</u>	12	50	141
Spun waste silk	34	3	3	34
Cut silk staple	18	16	2	32
Woolen	1,022 <u>a/</u>	260	318	964
Others	69 <u>a/</u>	7	4	72

a/ Revised.

SOURCE: Japan Textile Association.

KNITTING MACHINES IN OPERATION

	<u>February</u>	<u>March</u>
Warp	51	90
Circular	2,337	2,420
Flat	2,910	2,994
Flat for gloves	1,707	1,765
Hosiery	4,748	4,931

SOURCE: Japan Textile Association.

SEWING GOODS

46. Increases in tabi and bedding production were outstanding exceptions to the general decline in March production of household goods and clothing articles. Tabi manufacturers received special allocations of electric power because of industrial workers' need for footwear. The industry as a whole did not benefit from increased availability of electric power since large numbers of their plants are small home industry units which continued to operate under the power restrictions applied to private dwellings. Secondary-school uniform and bedding manufacturers received increased allocations of fabrics.

47. With the exceptions of kimonos, secondary-school uniforms, bedding and mosquito nets, distribution of manufactured articles was held up due to internal financing difficulties on the part of prefectural distributing organizations.

CLOTH CONSUMPTION AND STOCKS
(thousands of square yards)

	In Mills <u>28 February</u>	<u>Receipts</u>	<u>Consumption</u>	In Mills <u>31 March</u>
Cotton	12,949 a/	5,433	6,049	12,333
Rayon	2,849	3,611	3,839	2,621
Spun rayon	7,410	2,449	3,180	6,679
Silk	3,041	3	14	3,030
Reprocessed	519	11	152	378
Woolen and worsted	3,688	697	786	3,599
Others	3,083 a/	1,318	1,749	2,652

a/ Revised.

SOURCE: Japan Textile Association.

MANUFACTURED GOODS PRODUCTION AND STOCKS
(thousands of pieces)

	Pro- duction <u>February</u>	Stocks <u>28 February</u>	Pro- duction <u>March</u>	Distri- bution <u>March</u>	Stocks <u>31 March</u>
Ready-made clothing					
Work	1,004	2,531	800	844	2,487
Street and house	752	3,144	573	737	2,980
Kimonos	325	1,154	92	416	830
Underwear, shirts, etc.	1,972	7,438	1,523	2,068	6,893
Elementary- school uniforms	637	1,857	187	261	1,783
Secondary- school uniforms	104	287	141	109	319

	<u>Pro- duction February</u>	<u>Stocks 28 February</u>	<u>Pro- duction March</u>	<u>Distri- bution March</u>	<u>Stocks 31 March</u>
Tabi (pairs)	1,718	1,038	3,681	2,515	2,204
Mattress ticking (sets of 3)	11	115	168	144	139
Mosquito nets	91	311	63	99	275
Hats	364	781	154	227	708

SOURCE: Japan Textile Association.

SUNDRY GOODS

48. Improved electric power deliveries to the fish-net manufacturers and larger deliveries of yarn resulted in an increase in total production from 795,000 pounds in February to 1,041,000 pounds in March.

SUNDRY GOODS PRODUCTION AND STOCKS (thousands of pounds)

	<u>Production February</u>	<u>Stocks 28 February</u>	<u>Production March</u>	<u>Distribution March</u>	<u>Stocks 31 March</u>
Fish netting					
Cotton ^{a/}	789	418	1,023	1,063	378
Manila	1	0	0	3	1
Silk	5	1	14	5	10
Sewing thread					
Pure cotton	381	2,401 ^{b/}	329	424	2,360
Mixed cotton	0	11	0	0	11
Silk	69	588	49	190	447
Rayon	16	40	35	18	57
Braid	44	151	61	36	176
Fringe	3	98	5	17	86
Tape	100	483	101	121	463
Twine and net	23	24	29	20	33
Lace	9	102	9	11	100

^{a/} Including twine.

^{b/} Revised.

SOURCE: Japan Textile Association.

DYEING AND FINISHING

49. Activity in the dyeing and finishing industry was accelerated during March with the exception of linen and ramie fabrics. The mills were working on cotton, rayon and silk fabrics scheduled for export.

50. The finishers received the first consignment of 7,480,330 linear yards of fabric, largely shirtings and jeans, woven under

the Commodity Credit Corporation Cotton Program to be bleached, printed, dyed and finished. This quantity was the first allocation of a total of 33,600,000 yards.

51. Dyeing and finishing mills have received greatly increased second quarter allocations of coal for the processing of materials scheduled for export.

CLOTH PROCESSED
(thousands of square yards)

	<u>Processed February</u>	<u>Processed March</u>	<u>Returned to Client</u>	<u>In Mills 31 March</u>
Cotton	4,639	6,645	6,984	8,140
Spun rayon	3,832	4,070	4,097	6,347
Silk	4,589	5,071	6,032	6,427
Rayon	3,403	4,813	3,237	9,616
Linen and ramie	888	787	1,071	2,098

SOURCE: Japan Textile Association.

52. The decrease in number of operating machines was offset by an increase in hours of operation. Machinery normally excess was put into operation during the electric power shortage to take advantage of the hours when power was available.

MACHINERY

	<u>February</u>	<u>March</u>
Mills reporting	219	220
Mills operating	159	174
Machines operating		
Boilers	243	240
Tenters	234	227
Driers	333	318
Printers	19	17
Napping machines	99	102

SOURCE: Japan Textile Association.

SECTION 6

TRANSPORTATION AND PUBLIC UTILITIES

C O N T E N T S

	Paragraph
Motor Transportation.	1
Rail Transportation	2
Water Transportation.	4
Electric Power.	6
Gas Industry.	15

MOTOR TRANSPORTATION

1. Improvement in the operative status of motor vehicles continued in March.

MOTOR VEHICLE INVENTORY

	<u>Trucks</u>		<u>Buses</u>	
	<u>February</u>	<u>March</u>	<u>February</u>	<u>March</u>
Operable	48,166	49,653	6,915	7,185
Deadlined	<u>27,520</u>	<u>27,626</u>	<u>4,806</u>	<u>4,591</u>
Total	75,686	77,279	11,721	11,776

SOURCE: Ministry of Transportation.

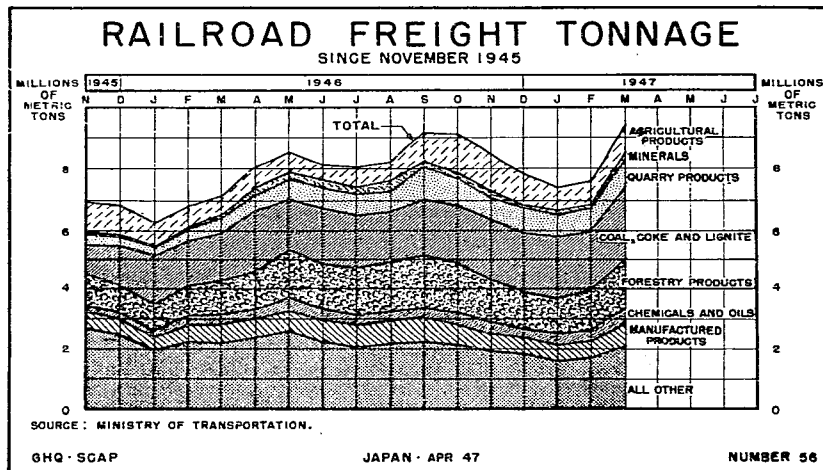
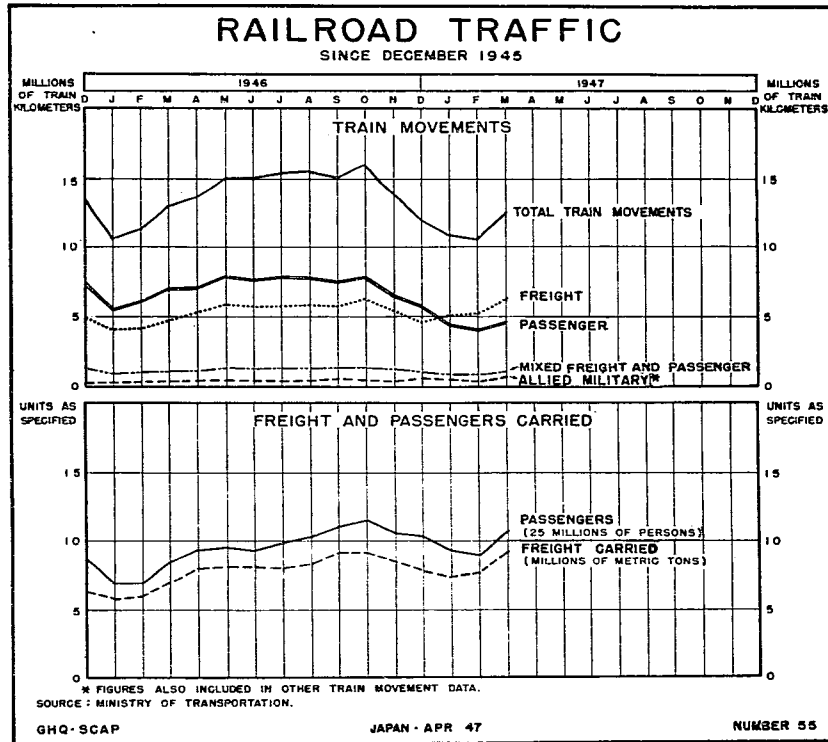
The revised number of trucks and buses in March 1946 totaled 69,304 compared with 89,055 as of March 1947.

RAIL TRANSPORTATION

2. A slightly more favorable coal allocation permitted considerable expansion of operations by government railways in March.

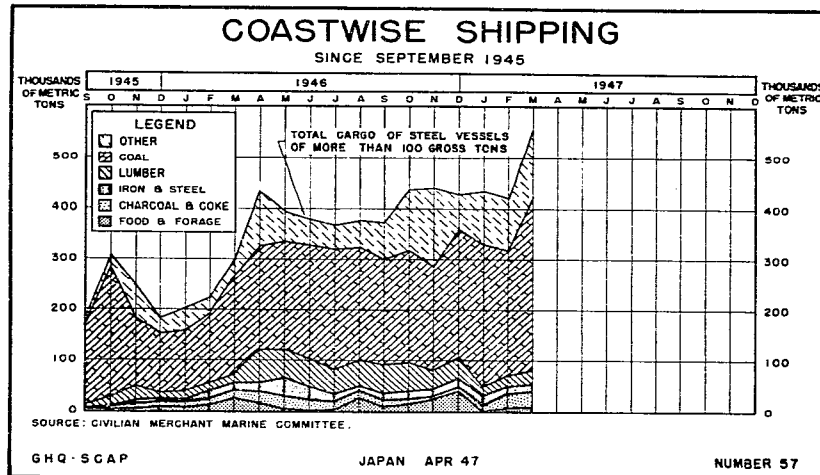
Passengers carried in March increased to 270,899,116. See chart, top of next page.

3. Freight tonnage handled, shown on chart No. 56, following page, increased from 7,600,600 in February to 9,433,500 metric tons in March.



WATER TRANSPORTATION

4. Coastwise and foreign shipping tonnage gained in March with coastwise shipping reaching 553,917 metric tons.



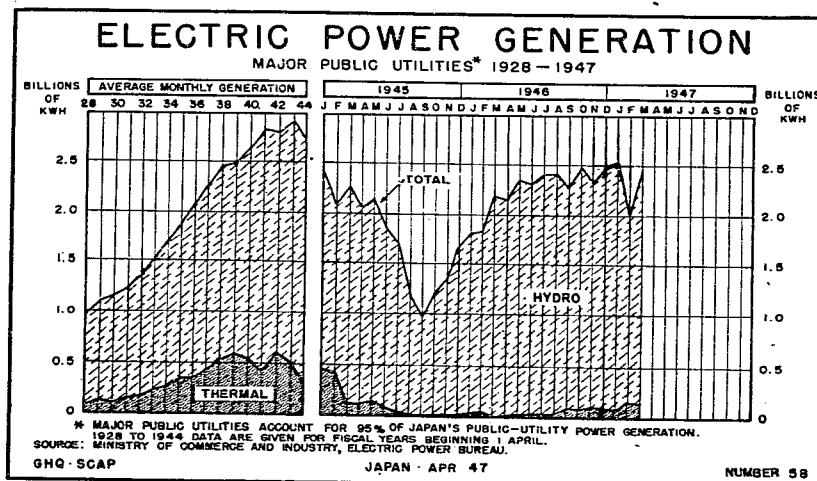
5. March shipments to China totaled 19,826 metric tons, a gain over February.

Shipments to Korea increased to 87,745 metric tons in March compared with February's 84,187.

ELECTRIC POWER

6. The total electric power generated was 2,432,541,000 kilowatt hours in March, an increase of 422,236,000 kilowatt hours or 21 percent over February and 8.7 percent higher than the predicted value of 2,238,000,000 kilowatt hours.

In contrast to February, when the natural stream flow was only two percent above the 10-year average, March showed a 10-percent increase above the 10-year average, resulting in increased hydroelectric power production.



7. Average daily thermal power production in March was 15 percent less than in February while hydro power production was 11 percent more. Daily total power production ran nine percent above February, relieving power restrictions to some extent.

MAXIMUM POWER RESTRICTIONS ^{a/}
March
 (percent of July-September average consumption)

	Essential Public Use and Coal Mining	Industrial		Commercial	Japanese Households
		Essential	Other		
Hokkaido	-	-	10	-	-
Tohoku	10	20	50	10	10
Kanto	10	20	50	10	10
Kansai	10	20	50	10	10
Chugoku	0	10	30	20	20
Shikoku	10	20	50	20	20
Kyushu	10	20	50	20	20

^{a/} Electric boilers totally restricted.

SOURCE: Ministry of Commerce and Industry, Electric Power Bureau.

8. Emergency restrictions had to be applied in Kyushu because of the low stream flow and in Hokkaido where the average flow was insufficient.

**GENERATING STATISTICS OF
 NATURAL-FLOW-TYPE POWER PLANTS ^{a/}**
 (thousands of kilowatts)

District	March	Ten-year Average	Percent of Average Flow
Hokkaido	55	55	100
Tohoku	108	108	100
Kanto	922	870	106
Kansai	1,264	1,082	117
Chugoku	211	173	122
Shikoku	110	98	112
Kyushu	141	167	84
Total	2,811	2,553	110

^{a/} Owned by Japan Electric Generation and Transmission Company.

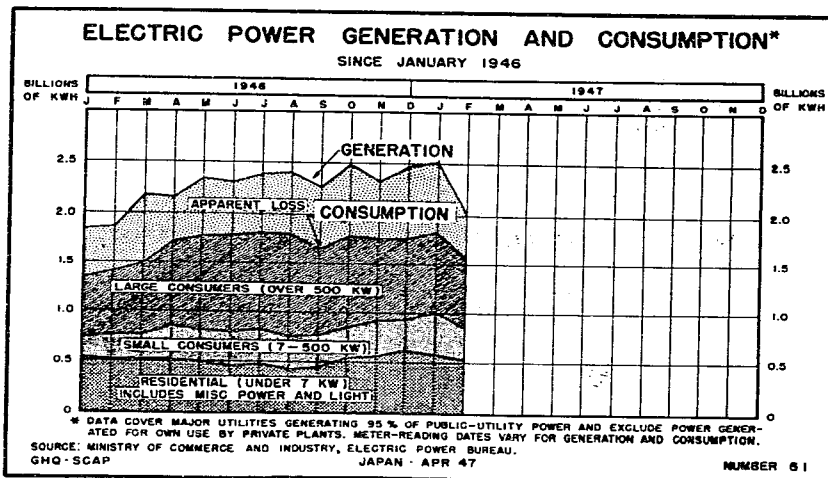
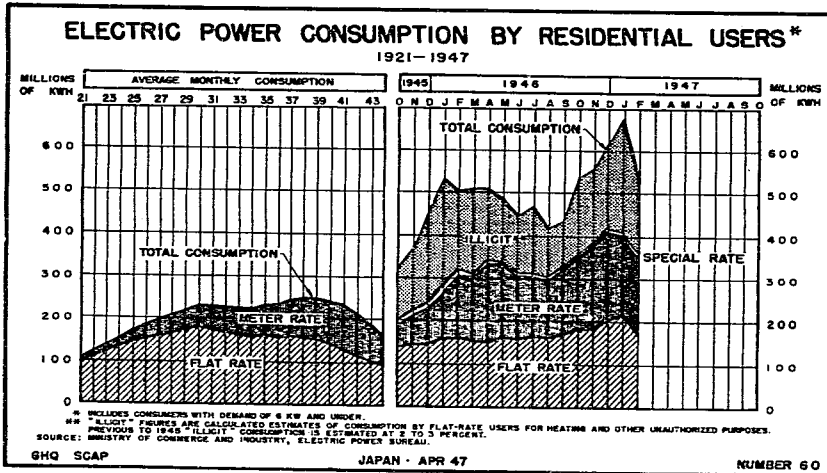
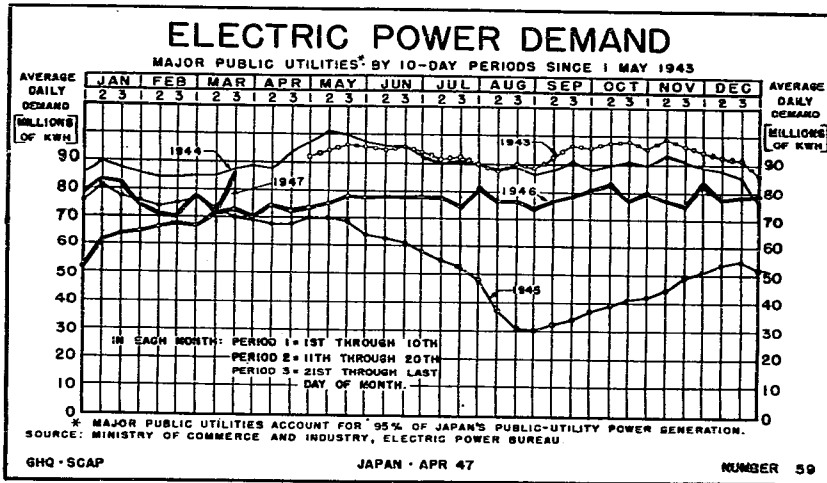
SOURCE: Ministry of Commerce and Industry, Electric Power Bureau.

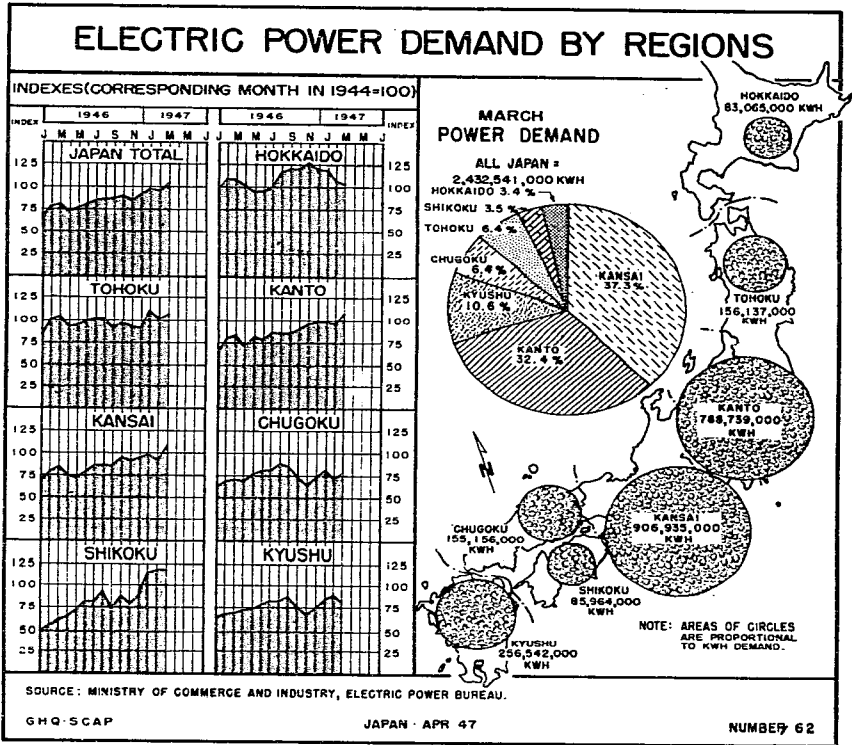
9. Daily power demand averaged 78,500,000 kilowatt hours of which 74,000,000 were produced by hydro power and 4,500,000 by steam. Note chart at top of facing page.

10. The Kansai and Kanto regions accounted for over half of the total demand. See chart, page 162.

11. February consumption of electric power by residential users, shown in center chart opposite, decreased to 527,000,000 kilowatt hours.

12. Consumers with a demand of over 500 kilowatts accounted for 723,000,000 kilowatt hours of the total consumption of 1,579,000,000. See the facing chart.





13. The industry estimates that it will produce 2,914,000,000 kilowatt hours in April. Hydroelectric generation will account for 2,835,000,000 kilowatt hours and steam for the rest.

Plant Construction

14. Construction of 13 hydroelectric power plants is in process. Of their total capacity of 149,800 kilowatts 52,700 have been completed. A total of 6,800 kilowatts of hydroelectric power production capacity was added to the system during March after completion of repairs. However 11 plants with a hydroelectric power capacity of 46,720 kilowatts are inoperative because of waterway trouble.

Minato No. 2 thermal power plant is nearing completion and will be able to deliver about 25,000 kilowatts. Amagasaki No. 2 has been 50 percent repaired.

GAS INDUSTRY

15. The amount of gas produced on an average day during March was 1,097,013 cubic meters, 29.7 percent of plant capacity.

16. Daily natural gas production in Akita, Chiba, Niigata and Nagano amounted to 18,452 cubic meters, 1.7 percent of total gas production.

0450

COAL FOR THE MANUFACTURE OF GAS
(metric tons)

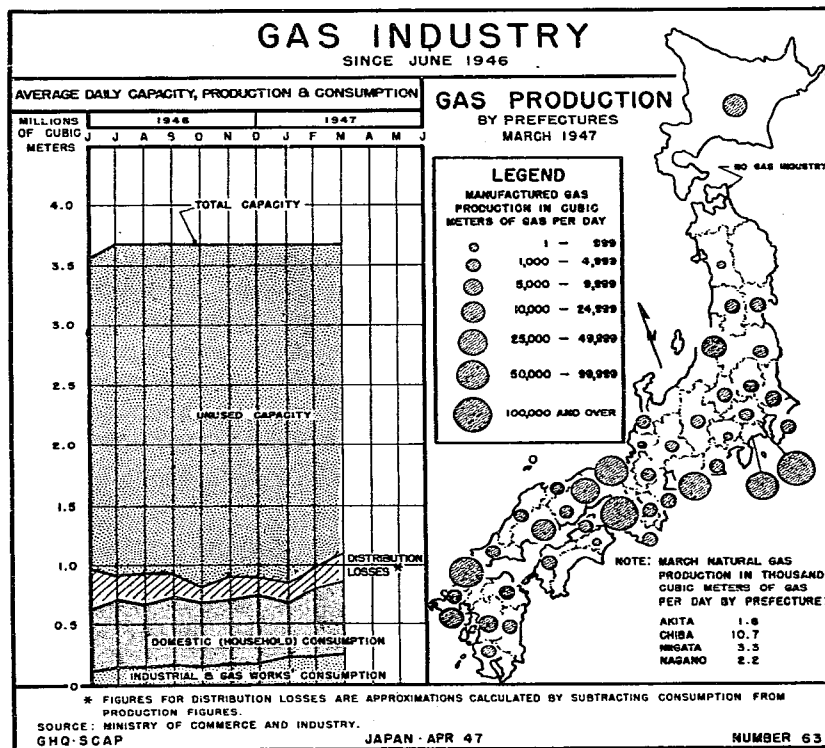
	<u>March</u>	<u>April</u>
Allocation	82,500 <u>a/</u>	95,000 <u>b/</u>
Deliveries	74,627	-
Consumption	72,495	-
Stock on hand 31 March	10,094	-

a/ Eight thousand five hundred tons for manufacturing coke with gas as a by-product.

b/ Twenty thousand tons for manufacturing coke with gas as a by-product.

SOURCE: Ministry of Commerce and Industry, Coal Board, Gas Section.

17. The daily average amount of gas consumed in March was 595,261 cubic meters domestically, 219,386 industrially and 45,000 in gas works. The total of 859,647 cubic meters represented an increase of 66,984 cubic meters, 8.4 percent over February consumption.



18. The apparent loss in distribution leakage amounted to approximately 21.6 percent in March.

SECTION 7

COMMUNICATIONS

C O N T E N T S

	Paragraph
Administration.	1
Wire.	3
Radio	8
Postal Services	20
Construction and Rehabilitation	27
Equipment Manufacturing and Supply.	35
Personnel	45
Financial Operations.	47

ADMINISTRATION

1. Conferences were held by the Ministry of Communications in Osaka, Matsuyama and Hiroshima on 14, 17 and 19 April, respectively, to clarify to local officials the methods of applying the new accrual accounting system to budget planning and its procedural details.

2. On 23 April the Ministry of Communications announced the establishment of a Labor Bureau and the division of the Postal Savings and Life Insurance Bureau into separate Postal Savings and Postal Life Insurance Bureaus.

The new Labor Bureau consists of five sections. The Labor Section will deal with labor relations and working conditions. The Allowances Section will handle all matters relative to wage payments. The Health Section, the Welfare Section and the Tokyo Communications Hospital have functions which are self-explanatory.

The new Postal Savings Bureau will operate on the same level as the General Affairs Bureau and the Telephone and Telegraph Bureau. The Postal Life Insurance Bureau will be at a higher level within the Ministry.

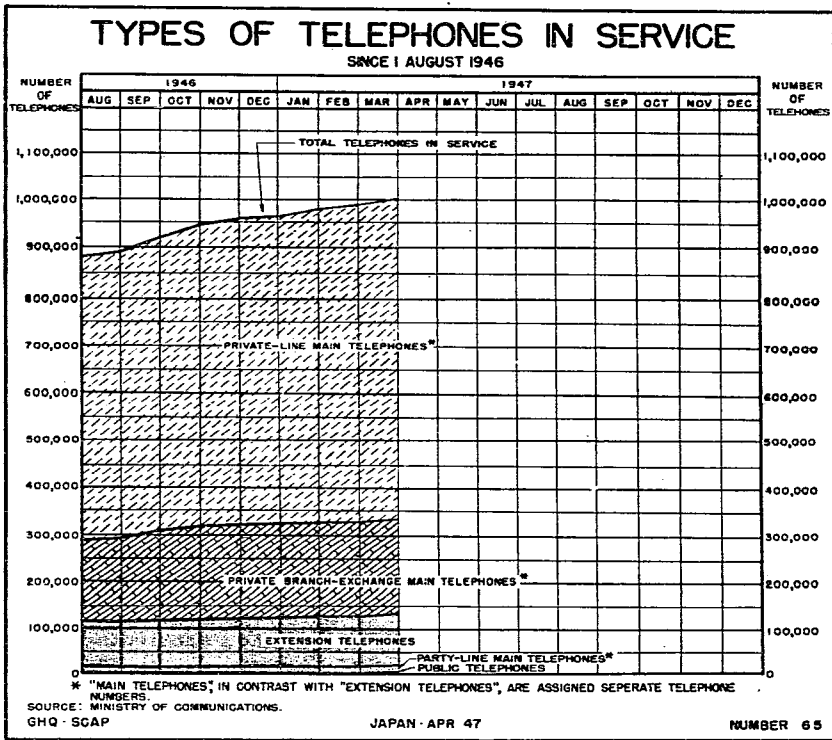
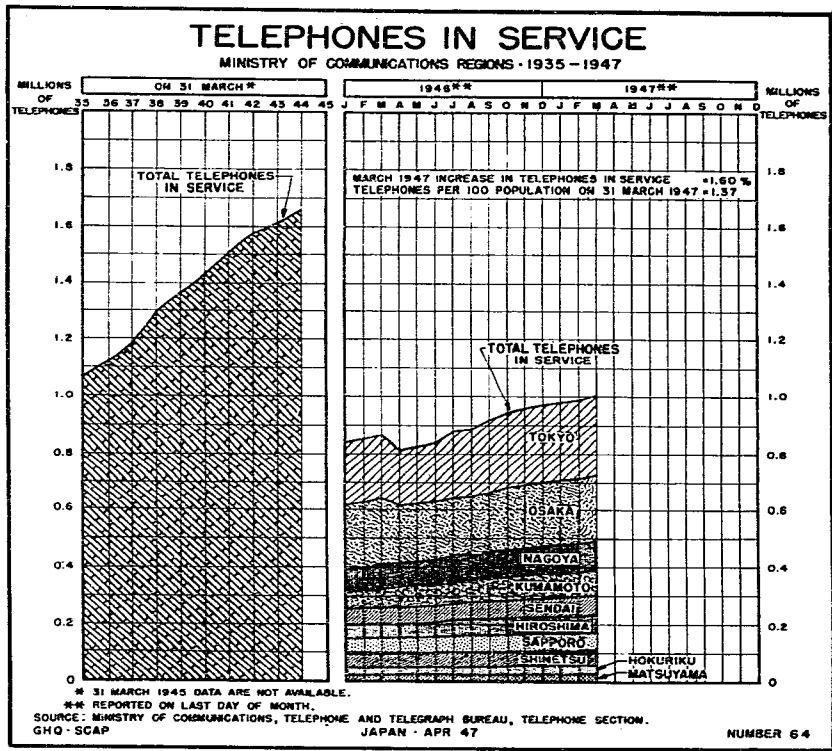
WIRE

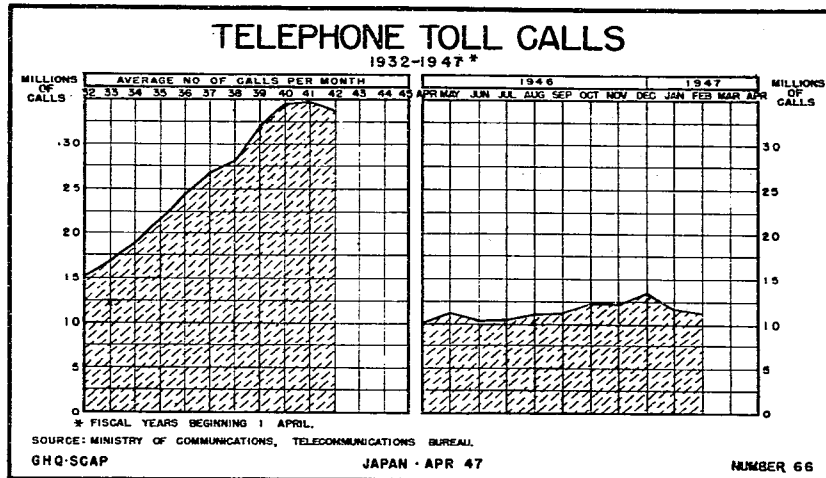
Domestic Telephone

3. The number of telephones in service increased slightly in March, continuing the trend which started in September 1946. See the top chart on page 166.

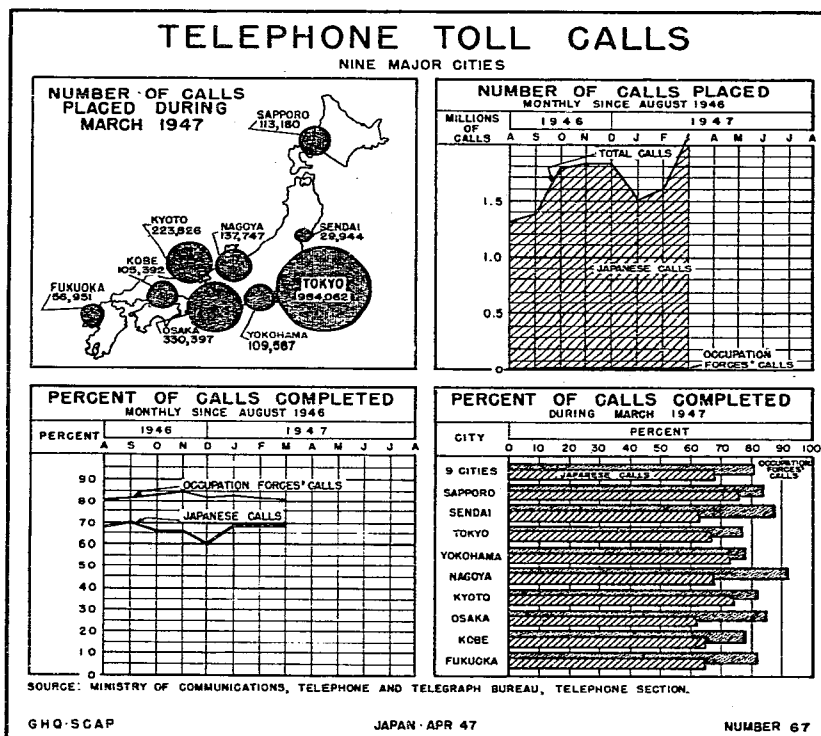
4. Private-line main telephones increased two percent in March. Approximately 67 percent of all telephones in service are now private-line main telephones. Note the second chart, following page.

5. During February domestic toll traffic, continuing its downward trend, declined three percent as shown at the top of page 167.





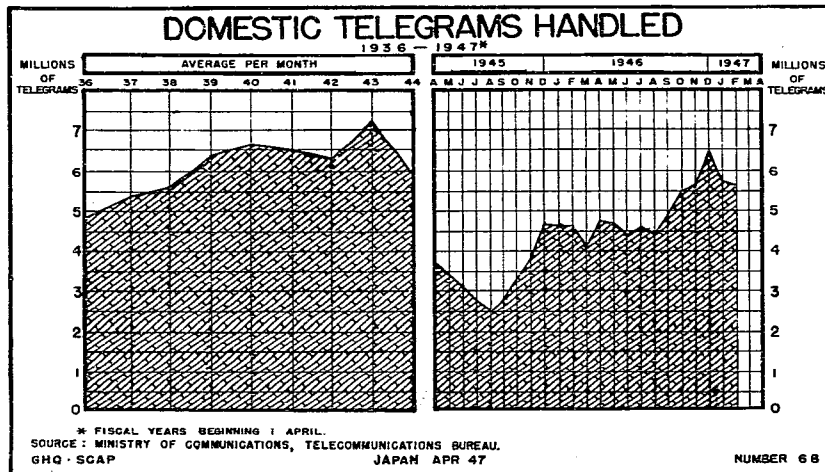
6. March was the second consecutive month in which no change was recorded in the percentage of Japanese telephone toll calls completed in nine major cities. Completion of Allied Forces calls continued to drop at the steady rate of one percent.



Domestic Telegraph

7. The post-holiday-season decline in domestic telegram volume

continued into February with traffic dropping approximately two percent.



RADIO

Domestic Radio Service

8. The Japanese Coastal Radio Service, which heretofore provided ship-to-shore service only for Japanese coastal shipping, was expanded on 10 April to serve Allied merchant vessels. Messages dealing with estimated time of arrival of shipping, control of ship traffic, official shipping information and navigation or distress messages from shipping will be accepted for transmission. American citizens aboard American merchant ships may exchange messages with Occupation Forces personnel having APO or FPO addresses in Japan. At present the service is used only by American and British shipping but it will be extended to other Allied nations upon their application.

9. On 1 April the Ministry of Communications activated in the Radio Bureau a new section to investigate and initiate appropriate action against Japanese radio stations which violate general radio regulations.

10. The Ministry of Communications was authorized on 1 April to use two radio frequencies in implementing a plan to establish 10 new radio stations linking the monitoring stations now supervising Japanese radio transmission.

11. On 16 April the Broadcasting Corporation of Japan was allocated 10 new radio frequencies for experimenting with a modern antenna not previously used in Japanese broadcasting.

12. The Ministry of Communications licensed 44 new stations on 1 April. Twenty of these permit ship-to-shore communication with fishing fleets for more rapid handling of the catch. Five licenses were issued to new police radio stations on islands west of Nagasaki Prefecture to combat illegal immigration and smuggling. Nine radio manufacturers were licensed to experiment with VHF mobile equipment for use by police, fire departments and railroads. The remaining 10 were miscellaneous special stations.

JAPANESE RADIO STATIONS IN OPERATION

<u>Class</u>	<u>31 January</u>	<u>1 April</u>
Coastal	15	15
Domestic point-to-point	156	154
Broadcast	98	104
Broadcast relay	30	30
Police	57	62
Privately owned	11	11
Special (standard frequency, experimental, scientific)	28	47
Meteorological	32	32
Railroad	105	105
Aeronautical	12	12
International point-to-point	8	8
Lighthouse	24	24
Fishing	26	46
Demobilization	15	15
Total services	617	665
Less duplications	<u>41</u>	<u>45</u>
Total stations	576	620

SOURCE: Ministry of Communications.

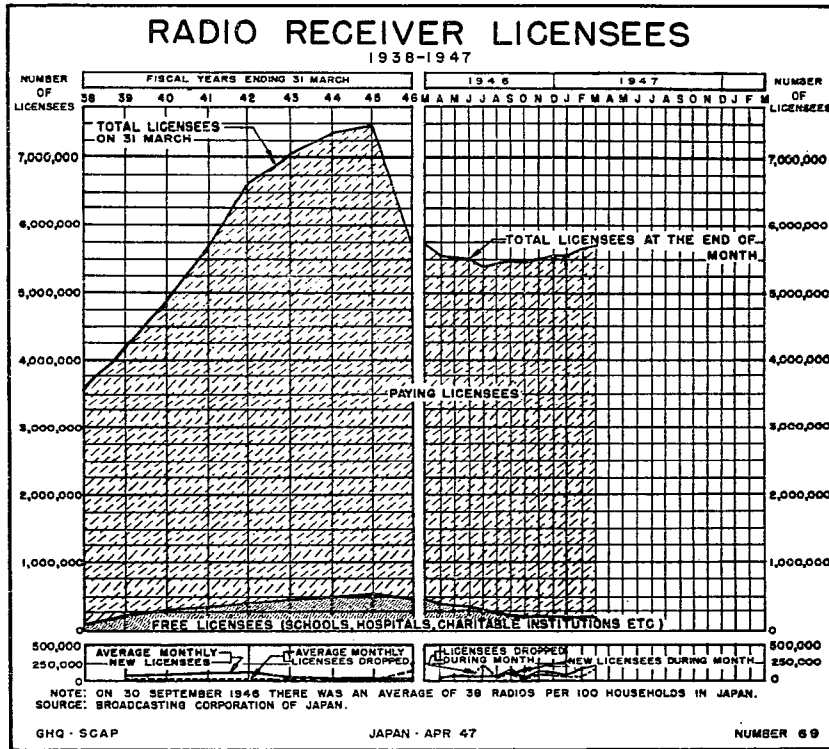
Domestic Broadcasting

13. The Shingu broadcasting station, destroyed in last December's earthquake and tidal wave, acquired a new transmitting station, dormitories for employees and a listeners' service station during April.

14. Receiver license discontinuances, caused largely by the critical shortage of repair parts, reached the peak figure of 192,000 during March, about three times as many as in February. Some radio servicemen are dismantling new receivers to obtain parts for repairs. See chart at top of following page.

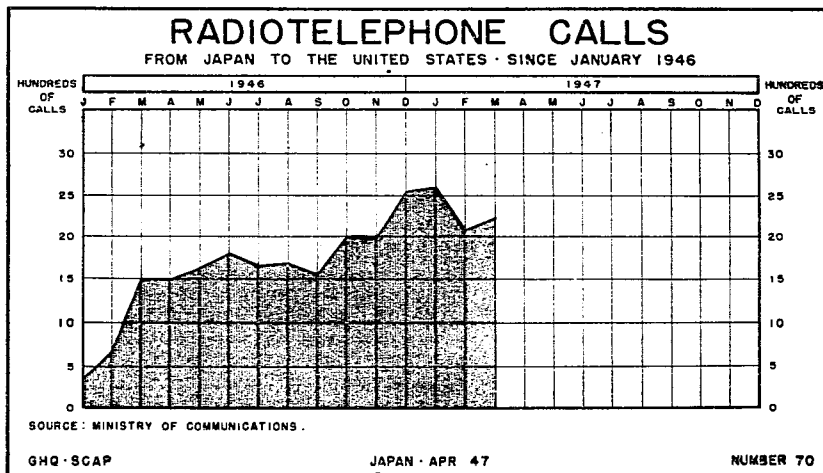
15. At the end of March 5,700,000 home receivers were licensed. The Broadcasting Corporation of Japan estimates that 1,000,000 households were operating receivers illegally. This higher estimate is based partly on the surprising success of the "Fair Listening Movement," a campaign to locate and license all radios, which brought nearly 200,000 new licenses in March. The campaign was aided by several prefectural and municipal governments which levied or have applied for permission to levy taxes on household radios. Many illegal listeners realized that they would be evading a government tax as well as the listening fee and decided to legalize their ownership.

16. Through 31 March samples of 66 newly designed standard or "National Type" receivers were submitted by manufacturers to the Broadcasting Corporation of Japan for inspection. Of these, 36 were approved, 21 will be modified by manufacturers with Corporation guidance, two were rejected and seven are still being tested. This testing is similar to that used by the Underwriters' Laboratory in the United States for inspecting and recommending electrical equipment. The service is optional but only certain standard low-cost receivers approved by the Corporation are exempt from an excise tax.

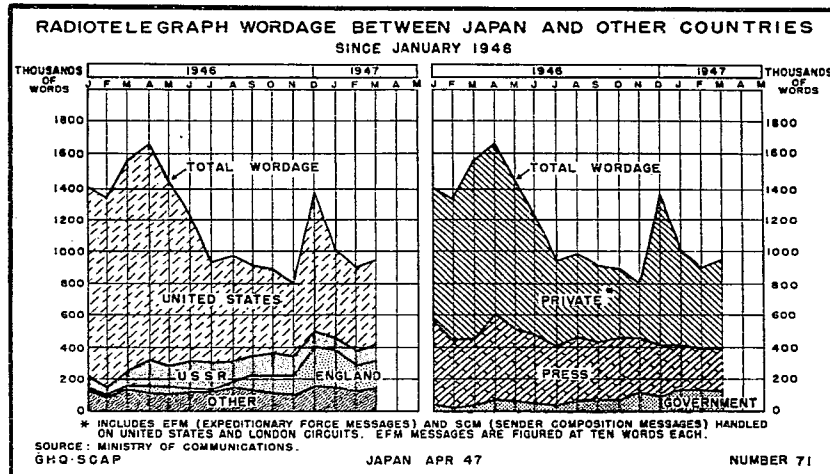


International

17. During March the number of radiotelephone calls from Japan to the United States increased seven percent, reversing February's trend.



18. The volume of international radiotelegraph traffic rose five percent in March, reversing the preceding two-month trend.



19. Radiotelegraph service connecting Japan, Hawaii and the United States was expanded on 18 April when the Japanese Government was authorized to establish a private message service with these points. Anyone in Japan may now receive private messages with prepaid reply from the United States or Hawaii and may file private return messages, using reply-paid vouchers for payment. This system provides for people who have no access to Military Payment Certificates and were unable to reply to messages received. All messages are subject to censorship and are restricted to personal, social, business, commercial and financial messages of an informational and nontransactional nature. The English, French, Russian, Chinese, Japanese and Portuguese languages may be used.

POSTAL SERVICES

20. While the volume of domestic letter mail handled during March was substantially the same as that handled during February, parcel post volume continued to drop at a steady four-percent rate. Note chart on top of next page.

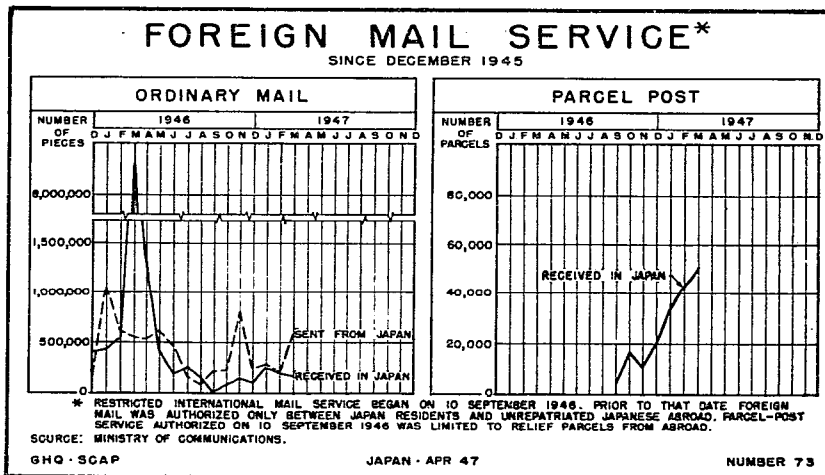
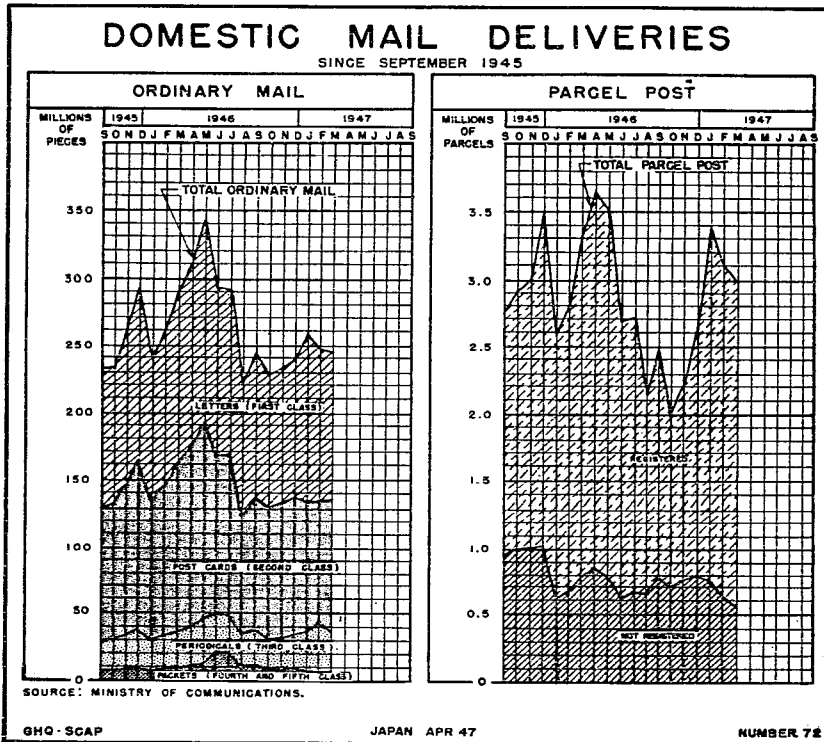
International Mail

21. In March, the third month since the authorization of letter exchanges between Japan and other countries, there was for the first time a decline (17 percent) in the number of incoming letters and post cards. The number of letters and post cards dispatched from Japan continued to increase, being 186 percent higher in March than in February. See chart on next page.

22. The March rate of increase in the number of gift parcels received in Japan was 17 percent, compared with 27 percent in February. Total volume was 464,100 pounds.

Finance

23. Postal savings deposits increased slightly in March, as reflected in the chart on page 173. There were negligible changes in the value of postal life insurance and annuity policies and postal transfer deposits. Payment of taxes contributed to an increase of 37 percent in money orders issued.

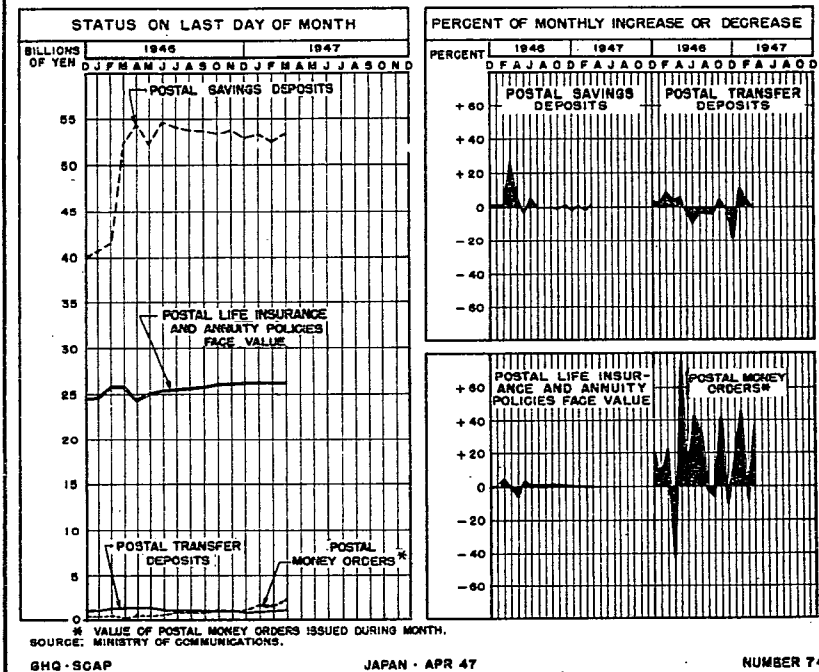


24. Effective 1 April the limit on postal orders, a widely used form for small transactions, was raised from ¥ 300 to ¥ 1,000; ordinary postal money orders and telegraphic money orders from ¥ 1,000 to ¥ 5,000; and postal transfers from ¥ 3,000 to ¥ 10,000.

25. As an added protective measure postal orders since 15 April are being made out on a new form to specific payees who must identify themselves to receive payment.

POSTAL SAVINGS, POSTAL LIFE INSURANCE AND MONEY ORDERS

SINCE DECEMBER 1945



Post Offices

26. On 31 March there were 556 ordinary and 13,124 special post offices in operation, an increase of three ordinary and 50 special post offices over February.

CONSTRUCTION AND REHABILITATION

Telephone and Telegraph

27. Rehabilitation of the telephone exchanges in the Kobe and Kyoto areas was completed in mid-April as scheduled. Progress continues in other areas.

TELEPHONE REHABILITATION
20 April

	<u>Number of Exchanges</u>	<u>Percent Completed</u>
Hiroshima	3 dial, 2 toll	74
Kumamoto	6 dial, 3 common battery, 6 toll	65
Nagoya	5 dial, 2 toll	60
Matsuyama	1 dial, 1 common battery	52

SOURCE: Ministry of Communications.

Calling tests in the areas being rehabilitated show a steady increase in the percent of calls completed and quality of transmission.

28. The transmission testing initiated in March on main toll circuits radiating and controlled from Tokyo was extended in April to all main toll routes in Japan. All toll circuits are scheduled for testing by 1 August.

29. The Ministry of Communications announced the establishment of two telephone maintenance training schools in Tokyo. Fifty men began an intensive course at the Tsukiji Exchange on 21 April and 31 men will begin a similar course at the Kichijoji Exchange on 15 May.

30. To speed up routine and simplify repairs in the rehabilitation of Japan's telephone and telegraph network the Ministry of Communications Supply Bureau and Engineering Bureau have listed 105 commonly needed items of which minimum stocks will be kept at all local offices. A revised supply system provides for daily inventories, automatic reordering of consumed supplies and a rapid flow of repair parts.

31. The Ministry of Communications started a drive in April to improve transmission over the wire network feeding local radio stations.

Postal

32. Maintenance and remodeling work on railway mail cars in February and March succeeded in keeping service up to the January level. Eight cars were salvaged from parts of cars previously charged off as fully depreciated. Only 459 cars could be effectively used due to the current temporary curtailment of train service.

During February and March 30 trucks were procured or salvaged. It is planned to use some of the U. S. Army surplus trucks recently sold to the Japanese Government to extend existing truck routes and to re-establish routes discontinued before and during the war.

STATUS OF MAIL VEHICLES

	<u>Railway Cars</u>		<u>Motor Trucks</u>		<u>Bicycles</u>	
	<u>31 Jan</u>	<u>31 Mar</u>	<u>31 Jan</u>	<u>31 Mar</u>	<u>31 Jan</u>	<u>31 Mar</u>
Carried on records	729	737	817	847	30,759	30,759
Unserviceable or otherwise assigned	201	208	185	190	8,472	7,435
In actual use	459	459	632	657	22,287	23,324
Additional needed	0	0	153	181	6,244	5,207
Total required	459	459	785	838	28,531	28,531

SOURCE: Ministry of Communications.

During March 1,037 bicycles were received from manufacturers, releasing an equal number of deteriorated machines which

will be scrapped for usable parts. In addition, 3,161 are rented from individuals at ¥ 35 per month.

33. The number of bicycles to be withdrawn from export was increased from 3,000 to 5,000 to meet the postal system's immediate needs.

34. On 31 March, the end of the fiscal year, 74 percent of the buildings in the year's postal construction program were over 50 percent complete.

POSTAL CONSTRUCTION PROGRAM
31 March

	Over 50% Complete	Under 50% Complete	Projects Dropped	Total
Post offices	47	0	3	50
Post-office dormitories	19	1	15	35
Hospital enlargements	1	0	0	1
Hospitals	1	0	0	1
Secondary schools	1	1	0	2
Workrooms and dormitories	7	1	2	10
Printing plants	1	0	0	1
Stamp and card depositories	1	0	0	1
Warehouses	2	0	0	2
Mailbag depositories	20	1	10	31
Clinics	7	1	4	12
Postal Savings branches	7	0	1	8
Postal Life Insurance branches	<u>1</u>	<u>0</u>	<u>0</u>	<u>1</u>
Total	115	5	35	155

SOURCE: Ministry of Communications.

The coming year's program calls for completion of the present projects as well as certain new ones.

EQUIPMENT MANUFACTURING AND SUPPLY

35. Production of communication equipment in March was the highest since the surrender chiefly because of greater coal deliveries and relaxation of electric power restrictions with the end of the dry season.

36. March coal deliveries to communication equipment manufacturers were 46 percent higher than in February, partly because of a 25-percent raise in the quantity allocated. First deliveries of lignite occurred in March, 57 percent of the 1,500-metric-ton allocation. Lignite allocations for April and May remain at 1,500 metric tons.

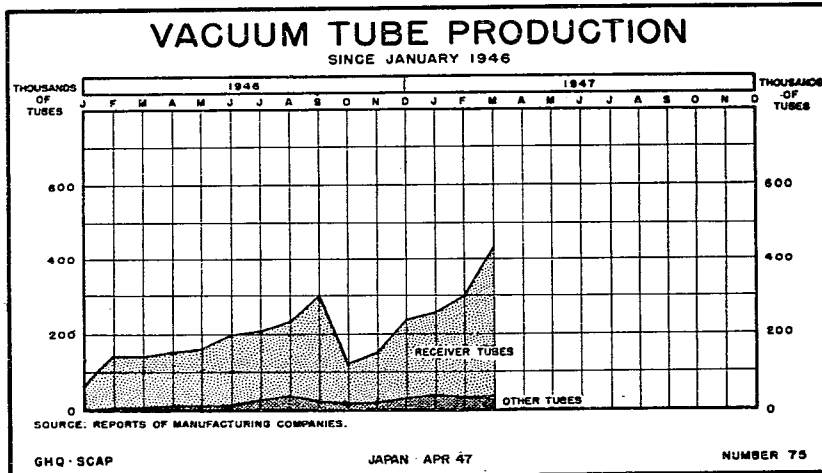
COAL ALLOCATIONS AND DELIVERIES
(metric tons)

	<u>Coal Allocated</u>	<u>Coal Delivered</u>	<u>Percent of Allocation Delivered</u>
February	6,000	3,780	63
March	7,500	5,500	73
April	7,500	-	-
May	8,000	-	-

SOURCE: Manufacturers' reports.

Radio Equipment

37. The production of all types of vacuum tubes reached a new peak in March, 48 percent over February production. Badly needed receiver tube production increased 52 percent.



38. The higher production of receiver tubes will permit an increase in the allocation of tubes for repair of sets presently inoperable.

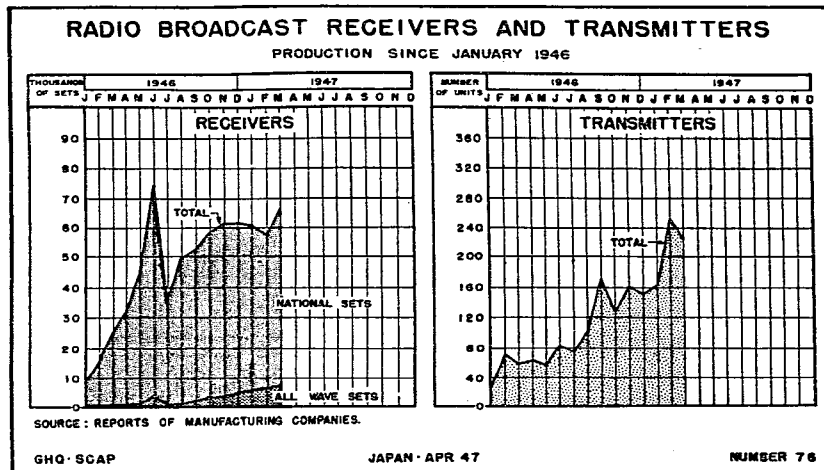
RECEIVER TUBE ALLOCATIONS

	<u>February</u>	<u>March</u>	<u>Percentage</u>	
			<u>February</u>	<u>March</u>
New radios and amplifiers	240,239	270,000	73.0	69.2
Replacements	74,048	102,993	22.5	26.3
Operations ^{a/}	<u>14,808</u>	<u>17,577</u>	<u>4.5</u>	<u>4.5</u>
Total	329,095	390,570	100.0	100.0

^{a/} Required by the Ministry of Communications, the Broadcasting Corporation of Japan and manufacturers for testing.

SOURCE: Communications Equipment Manufacturers' Association.

39. Total radio receiver production increased approximately 16 percent in March. Transmitter production decreased 10 percent, the first drop in three months.



40. March increases in radio parts production will contribute further to receiver set repairs.

RADIO PARTS PRODUCTION
(thousands)

	<u>February</u>	<u>March</u>
Condensers	1,484	1,444
Resistors	1,379	1,386
Transformers	77	91
Speakers	67	107
Miscellaneous (thousands of yen)	15,842	21,451

SOURCE: Manufacturers' reports.

Wire Equipment

41. New high levels were attained in March in the production of telephone sets, carrier systems and parts.

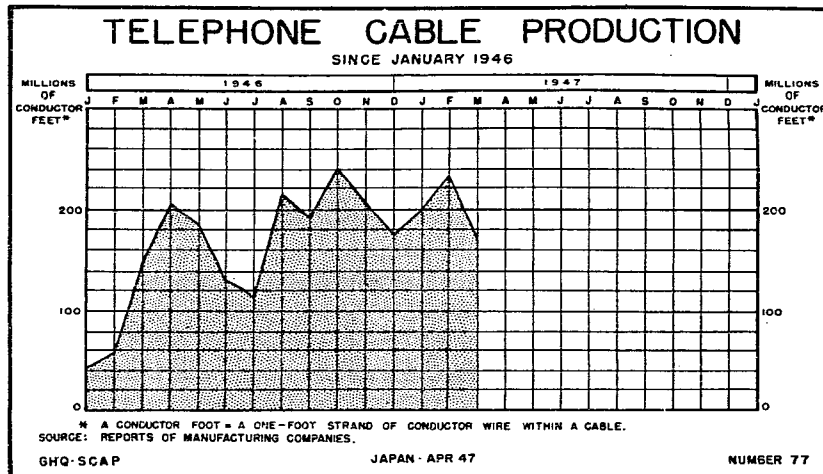
WIRE COMMUNICATION EQUIPMENT PRODUCTION

	<u>February</u>	<u>March</u>
Telephone sets	20,278	23,794
Manual switchboards	296 ^{a/}	264
Automatic switch units	2,719	4,444
Carrier systems	258	438
Repeater systems	48	25
Miscellaneous (thousands of yen)	14,316	19,348

^{a/} Revised.

SOURCE: Manufacturers' reports.

42. A coal shortage at one large cable-manufacturing plant caused a 17-percent drop in production of cable footage, from 1,660,000 to 1,380,000. Production in conductor-feet was 27 percent less than in February.



Japanese Army-Navy Equipment

43. In March 113 field radio sets from Army-Navy stocks were shipped to China. Testing was completed on 255 similar radio receivers scheduled for future shipment.

44. Approximately 60 percent of all former Japanese Army-Navy communications equipment and parts released to the Ministry of Communications for civilian use had been distributed by the end of March. A detailed inventory of the remaining equipment, most of which is unsuitable for civilian use in its present form, was about 75 percent complete by 31 March.

PERSONNEL

45. Between 2 March and 5 April average weekly absenteeism was 5.3 percent, .1 percent less than during the preceding three weeks.

46. No major shifts were recorded during March in the number of Postal Bureau and Postal Savings and Life Insurance Bureau personnel. The number of classified employees is fixed by law. Additional persons hired, who have the same qualifications as classified employees and receive the same treatment, are listed as "quasi-classified."

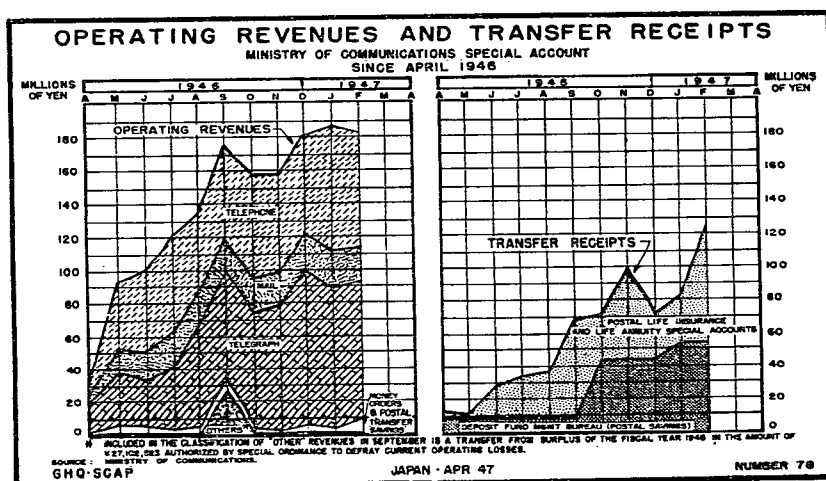
NUMBER OF POSTAL EMPLOYEES
31 March

	<u>Second Class</u>	<u>Third Class</u>	<u>Quasi-classified</u>	<u>Unclassified</u>	<u>Total</u>
Postal Bureau	217	23,519	21,843	54,395	99,974
Postal Savings and Life Insurance Bureau	1	14,486	5,540	67,468	87,495
Postal Savings and Life Insurance branches	<u>88</u>	<u>8,732</u>	<u>37</u>	<u>20,922</u>	<u>29,779</u>
Total	306	46,737	27,420	142,785	217,248

SOURCE: Ministry of Communications.

FINANCIAL OPERATIONS

47. A two-percent drop in Ministry of Communications February operating revenues was the first decrease since October.



SECTION 8

LABOR

C O N T E N T S

	Paragraph
Labor Legislation and Policy.	1
Labor and Employer Organizations.	8
Labor Relations	26
Labor Education	38
Wages and Working Conditions.	44
Employment and Unemployment	51
Public Works.	66
Labor for the Occupation Forces	69
Administration.	71

LABOR LEGISLATION AND POLICY

Ordinance for the Reorganization of Employment Exchange Administration

1. A Ministry of Welfare ordinance issued on 8 April reorganized public employment exchange administration. Field office supervision, formerly under the Ministry of Home Affairs, was transferred to the Ministry of Welfare with additional power to control prefectural operations including budget, personnel and location of employment security offices. Although the prefecture remained the basic unit of administration and limited supervisory authority rested with the prefectural governor, the Minister of Welfare was given discretionary power to set up centrally supervised regional offices covering several prefectures.

In order to emphasize the postwar shift in employment exchange activity from wartime labor mobilization to voluntary consultation, recruitment and placement service for employers and job applicants, the ordinance further changed the name of the exchanges from Kinrosho (Diligent Labor Office) to Kokyo Shokugyo Antei Sho (Public Employment Security Office).

The ordinance was a temporary measure pending National Assembly action on the Employment Security Bill amending the Employment Exchange Law of 1938.

Amendment to the Trade-union Law

2. A program to ascertain public opinion on amendment of the Trade-union Law, initiated by the Ministry of Welfare in January in response to labor and employer criticism of the statute, neared completion. A general publicity program was carried out through magazine, newspaper and radio releases. All prefectural governors sponsored roundtable-labor-management conferences on suggested revisions of the Law. These conferences were based on a questionnaire mailed on 14 January to approximately 6,000 unions as well as to employer groups and prefectural Labor Relations Committees.

Discussion centered largely around proposed amendments concerning:

- (1) Guarantee of democratic union election procedures including full membership vote and use of the secret ballot.
- (2) Establishment of legislative safeguards against arbitrary exclusion or expulsion from union membership.
- (3) Public certification of union financial statements.
- (4) Establishment of procedures to determine appropriate bargaining units in plants and industries.
- (5) Barring of top-level supervisory employees from union membership.

Preparation of a draft bill for submission to public hearings was scheduled for mid-May.

Ministry of Labor

3. On 29 April the Cabinet announced that, in order not to hamper the work of the Cabinet which will take office under the new Constitution and to be consistent with the spirit of the Constitution which abolishes action by Imperial Ordinance, it has decided to postpone the establishment of a Ministry of Labor and to recommend to the new National Assembly that such a ministry be established without delay.

Labor Standards Law

4. Pending decision on the effective date of the Labor Standards Law enacted by the Diet on 27 March, preparation of ordinances for establishment by 1 May of the Labor Standards Bureau in the Ministry of Welfare and prefectural Labor Standards Offices was begun by the Ministry of Welfare.

Recruitment of personnel for the national and prefectural offices was under way.

5. A large-scale program to publicize the Law featured distribution by the Ministry of Welfare of 50,000 verbatim copies and a number of interpretative bulletins to all labor administration officials. Six lectures on the Law were given to labor and employer groups in Tokyo, Yokohama, Nagoya and Osaka between 29 March and 21 April, with additional lectures scheduled for other cities during May. Posters were displayed in factories and public places. The new Workers' Education Bureau of the Ministry of Welfare assisted in implementing the program.

Unemployment Insurance Bill

6. The Ministry of Welfare undertook revision of the draft Unemployment Insurance Bill, which was removed from the agenda of the 92nd Diet. The Ministry conducted a nationwide sample interview survey on duration of and reasons for unemployment to be used as the basis for revision of length of benefits, employment requirements and other provisions of the bill.

Labor Policy of Democratic Party

7. The labor policy of the Democratic Party, formed early in April, stressed labor-management cooperation for increased

production and wage-price stabilization. Also advocated were profit-sharing and minimum wage systems based on comprehensive cost-of-living statistics.

LABOR AND EMPLOYER ORGANIZATIONS

Labor-Management Economic Reconstruction Council

8. The labor-management Economic Reconstruction Council on 10 April decided to launch a popular movement for improved ration distribution. The Council appointed certain of its members to study the causes for rationing delays and to draft an alternative program for submission to the Government. Plans were made to sponsor a mass food rally in Tokyo.

9. The Coal Industry Reconstruction Council was active in assisting settlement of the coal miners' dispute by informal conciliation and maintenance of liaison with government agencies.

At a special meeting on 14 April the Council voiced its approval of the terms of the agreement and reiterated resolutions to secure more materials and funds for coal mine operation, maintain labor peace and increase production efficiency. The Council further agreed to establish in Hokkaido, Japan and Yamaguchi Prefecture regional Coal Industry Reconstruction Councils similar to that already established in Fukuoka Prefecture.

Political Activities

10. Of the 32 nonpolitical organizations registered by 6 April under Imperial Ordinance No. 101 to engage in political campaign activity during the elections, 18 were labor unions. National and prefectural labor-union officials won 23 of the 250 seats in the House of Councillors on 20 April. Sixteen labor leaders, 10 from national and six from local union offices, won seats in the 466-member House of Representatives on 25 April. Labor-supported Social Democratic candidates won governorships in Nagano, Tokushima and Fukuoka Prefectures. A labor leader was elected as governor of Hokkaido.

Labor Federations

11. On 23 April at a meeting sponsored by the National Liaison Council of Labor Unions approximately 1,000 labor union representatives announced plans to hold a rally and demonstration in observance of Japan's 18th May Day.

Efforts by government and municipal workers to persuade the Government to declare May Day an official holiday were rejected on 23 April although workers might attend with the permission of their supervisors. Stipulation that May Day might be observed as a holiday by government communications and railway workers and teachers was included in the contracts signed by these groups in February and March.

12. The General Federation of Japanese Trade Unions, the National Congress of Industrial Unions and the All-Japan Council of Labor Unions issued a joint statement defining the relationship between labor unions and workers' cooperatives. Cooperatives should be independent self-financed agencies but should be organized by trade-union leaders and should actively support unions in disputes by funds, publicity and other means, according to the statement.

13. At press interviews on 16 April the secretary general of

the National Congress of Industrial Unions and the executive officer of the General Federation of Japanese Trade Unions agreed that the labor movement currently was undergoing a period of self-examination.

The Congress official stated that Congress leaders were "aware of strong criticism being leveled at them by the rank-and-file members" particularly regarding the "wrong course mapped out for them" in the abortive general strike. The Federation officer stressed that rank-and-file criticism of Federation leaders was "rather conspicuous by absence" as the Federation leadership had "never gone to the extreme as the NCIU leaders did."

Remedy for the situation was to be found in "further democratization of union setup with a view to encouraging the rank-and-file to act with responsibility and self-respect," according to the Congress official, while the Federation leader stated that "a great deal of self-reflection seems to be called for."

14. A nationwide coal miners' physical education program, which would include regional and nationwide baseball tournaments, was undertaken by the National Council of Coal Mine Workers' Unions, with assistance by the Ministry of Welfare, the Coal Mining Cultural Association and the Society for Increasing Coal Output.

Labor Union Statistics

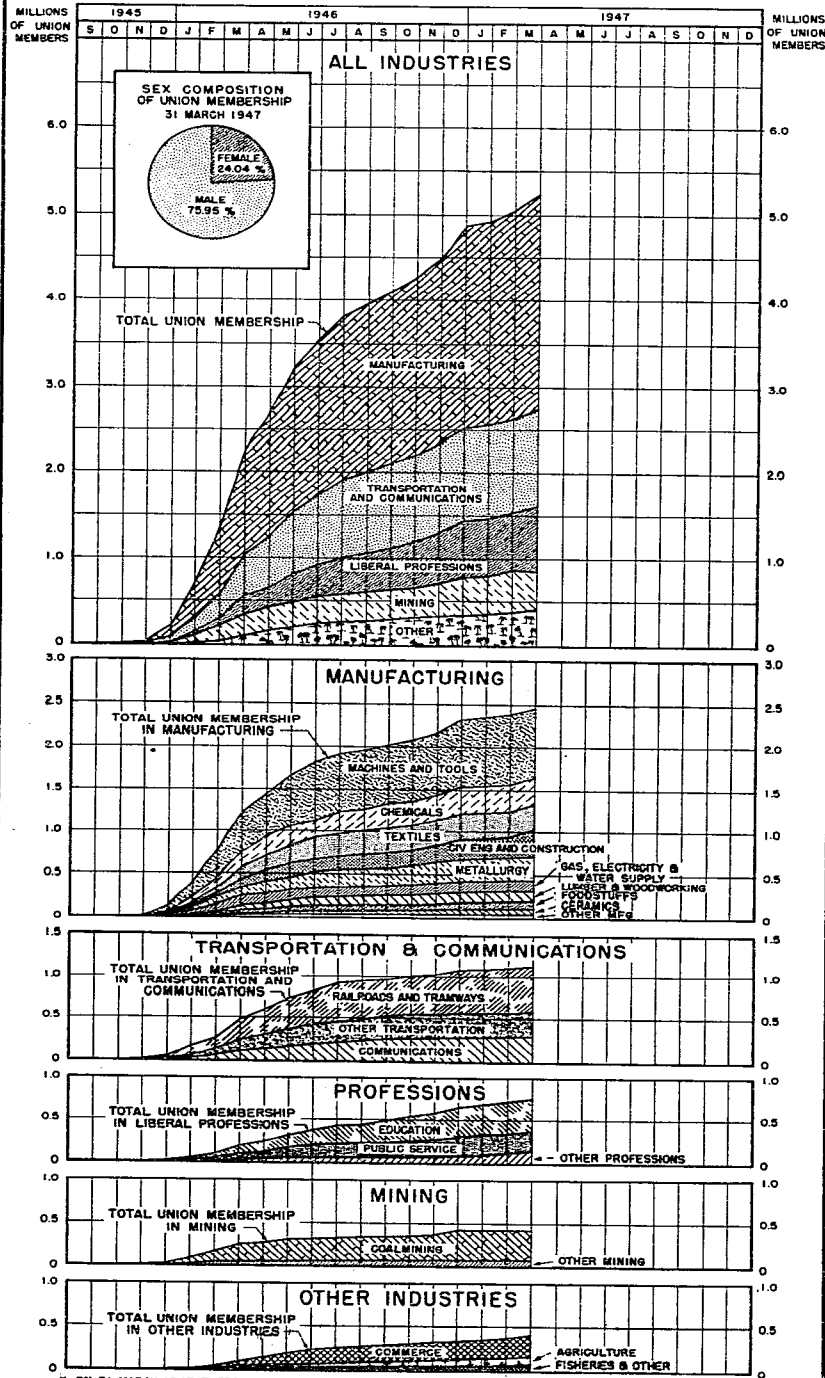
15. The Ministry of Welfare revised union statistics as of the end of 1946 to include all registrations of unions reported by prefectural officials to the Ministry after the close of the monthly reporting period. Unions numbered 17,265 with 4,849,329 members on 31 December 1946, according to the revised statistics, compared with the 17,163 unions and 4,415,482 members previously reported.

Total unionization represented 58 percent of the 8,232,400 paid nonfarm workers employed as of 30 June according to mid-1946 census reports adjusted to include 523,800 construction workers previously excluded. Coal miners and transportation and communications workers were the most highly organized groups with 85 and 82 percent of workers organized respectively. Workers in manufacturing were 47 percent unionized on the basis of employment at that time. Labor union membership since September 1945 is shown on the chart on the facing page.

16. Organization of 2,718 unions with 377,640 members during the first three months of 1947 raised union organization to a total of 19,983 unions and 5,226,969 members on 31 March.

LABOR UNION MEMBERSHIP*

SINCE 1 SEPTEMBER 1945



* ON 31 MARCH 1947 THERE WERE 19,983 UNIONS REGISTERED. UNION MEMBERSHIP FIGURES ARE EXCLUSIVE OF THE ALL-JAPAN SEAMEN'S UNION WITH 74,185 MEMBERS ON 1 FEBRUARY 1947.
 SOURCE: MINISTRY OF WELFARE.
 GHQ-SCAP

JAPAN - APR 47

NUMBER 79

LABOR UNIONS AND MEMBERSHIP a/
31 March

<u>Industry</u>	<u>Unions</u>	<u>Membership</u>		<u>Total b/</u>
		<u>Men</u>	<u>Women</u>	
Manufacturing				
Metallurgy	1,084	222,829	37,831	260,660
Machines and tools	3,019	684,544	137,363	821,907
Chemicals	1,465	234,990	90,282	325,272
Gas, electricity and water supply	439	124,986	13,306	141,457
Ceramics	405	50,815	16,111	66,926
Textiles	879	80,360	229,847	310,207
Lumber and woodworking	1,094	93,347	29,006	122,927
Foodstuffs	515	49,490	24,685	74,175
Printing and binding	207	21,677	10,762	32,439
Civil engineering and construction	798	284,099	17,091	301,190
Other	<u>187</u>	<u>14,098</u>	<u>7,084</u>	<u>21,182</u>
Total	10,092	1,861,235	613,368	2,478,342
Mining				
Metal	235	52,646	10,877	63,523
Coal	582	297,987	52,298	350,285
Other	<u>60</u>	<u>7,047</u>	<u>1,700</u>	<u>8,747</u>
Total	877	357,680	64,875	422,555
Transportation and communications				
Railroads and tramways	500	482,007	66,570	550,494
Automobile	266	43,868	6,498	50,366
Water (inland)	110	21,037	2,925	23,962
Other transportation	780	186,035	24,772	210,807
Communications	<u>1,184</u>	<u>196,645</u>	<u>101,348</u>	<u>303,077</u>
Total	2,840	929,592	202,113	1,138,706
Public service and liberal professions				
Public service	1,720	190,672	62,145	254,115
Education	1,482	223,386	159,428	383,576
Other	<u>720</u>	<u>92,637</u>	<u>37,056</u>	<u>129,704</u>
Total	3,892	506,695	258,629	767,395
Agriculture	860	72,771	16,468	89,239
Marine products	85	20,607	2,089	22,696
Commerce	1,188	160,295	85,189	247,271
Other	<u>149</u>	<u>50,826</u>	<u>10,139</u>	<u>60,765</u>
Grand total	19,983	3,959,501	1,252,870	5,226,969

a/ Unions reported registered exclusive of unions reported discontinued.

b/ Totals include following figures for which no sex breakdown was reported: manufacturing 3,759 (gas, electricity and water supply 3,165, lumber and woodworking 574); transportation and communications 7,001 (railroads and tramways 1,917, communications 5,084); commerce 1,787; public service and liberal professions 2,071 (public service 1,298, education 762, other 11); grand total 14,598.

SOURCE: Ministry of Welfare.

Labor Union Activities

17. Efforts at internal reorganization and increased local union autonomy began in three major unions:

- (1) Charging national union leadership with "Communist domination" the Mainichi newspaper local of the All-Japan Newspaper and Radio Workers' Union, key National Congress of Industrial Unions' affiliate, disrupted the Union's 27-28 March national convention with a resolution to withdraw. Action by the Union on the secession motion was postponed until the scheduled May convention, pending "mass discussion" by the rank and file.

Subsequently the Shin Osaka, Akita Sakigaki Shimpo, Godo and Saga newspaper locals also withdrew.

- (2) The General Federation of Government Railway Workers' Unions prepared a draft plan for internal departmentalization of the Federation along craft lines in accordance with a "reorganization for unity" resolution adopted at the 16-17 March national convention. The resolution followed debate over a proposal, later shelved, to bar Communists from union office and was in line with efforts to achieve unity beginning in the fall of 1946 when collective bargaining negotiations were seriously hampered by internal dissension.
- (3) Preparations were in progress for formation of an independent union by two factions that withdrew in November 1946 from the Toho Studio local of the All-Japan Movie and Theater Workers' Union in protest against allegedly arbitrary and undemocratic leadership both in the Theater Workers' Union and in the National Congress of Industrial Unions to which it was affiliated.

18. Increasing concern of organized labor in reducing prices to the level of wages was evidenced on 27 March by a resolution to launch a labor-sponsored drive for lower prices passed at an informal meeting of labor groups in Osaka. Present among others were representatives of the General Federation of Japanese Trade Unions, the All-Japan Seamen's Union and the All-Japan Electrical Workers' Union.

19. The Cabinet on 8 April made a clear-cut distinction between the official business of government and municipal employees and their union affairs. With the exception of those persons whose sole business was specified by the February and March government workers' contracts to be union business, workers were prohibited from engaging in union affairs during office hours; collective negotiations on office time might, however, be authorized by higher officials. Government offices might be used for meetings but use of government supplies for union purposes was forbidden. Only designated parts of office buildings might be used for posting of union material.

20. Meeting in Tokyo on 11 April, labor representatives from 148 plants of the Nissan, Toyota and Daihatsu automobile companies formed a preparatory committee for the organization of an automobile workers' union in these three companies. The meeting resolved to work for a master agreement with the companies involved covering

union recognition, closed shop and regional wage minimums. Further resolutions were made to launch an organizational drive throughout the industry.

21. The All-Japan Bank Clerks' Union was inaugurated on 11 April, consolidating 54 unions with a total claimed membership of 100,000.

World Federation of Trade Unions Commission

22. The World Federation of Trade Unions Commission which arrived in Tokyo in late March spent 10 days in Japan inspecting labor unions and labor conditions.

At a final press conference held in Tokyo on 6 April the American representative stated that while the Japanese unions were "still quite immature, we believe their enthusiasm, genuine interest and sincerity of purpose will reflect to the great credit of workers in Japan." The Commission stressed the importance of unification of the labor movement to assure healthy trade-union development.

The Commission announced it would issue a preliminary report on its survey in mid-June, to be followed by a complete report at a later date.

Dissociation of Wartime Leadership from the Labor Movement

23. The Ministry of Welfare late in March announced that, under the terms of the Imperial Ordinance of 14 December 1946 for the dissociation from the labor movement of wartime "labor front" officials, a total of 19,517 persons were ineligible for positions of leadership in organizations concerned with labor.

Persons affected had held positions as presidents or vice-presidents, directors, advisers, auditors, councillors, executive officers, editors of association publications, or bureau, division or local affairs chiefs. The total comprised 3,895 persons at one time influential in the Great Japan Industrial Patriotic Association (Dai Nippon Sangyo Hokoku-kai), 15,207 from the Great Japan Labor Patriotic Association (Dai Nippon Romu Hokoku-kai), 294 from the Japan Maritime Patriotic Association (Nippon Kaiun Hokoku-kai), 43 from the Harmonization Society (Kyocho-kai) and 78 from minor "labor front" organizations.

Employer Organizations

24. On 27 March the Federation of Iron and Steel Industrialists held a general meeting at which labor policies, relations with other employer organizations and general economic conditions were discussed. A petition was drawn up for presentation to the Government.

25. The seven-point "Request for Immediate, Forcible and Drastic Steps to be Taken Concerning the Labor Movement" was presented to the Government by the Federation on 18 April. The petition stressed the close relationship between the labor problem and the long-range economic reconstruction. It recommended immediate government action including clarification of the basic rights and functions of management and labor, legislative prohibition of production control, improved ration distribution, establishment of minimum wages in accordance with Labor Standards Law provisions and absorption into government and Occupation Force employment of workers laid off through curtailment of iron and steel production.

LABOR RELATIONS

Labor Relations Committees

26. Mediation activity of the Labor Relations Committees increased as unions turned more often to the Committees for assistance in negotiations.

27. Election of neutral members by recently chosen labor and employer representatives on 17 April completed selection of the new members of the Central Labor Relations Committee following the 1 March expiration of the one-year term of office of the original membership.

For the first time the full representation provided for by the Trade-union Law (seven members each for labor, employers and the public) was selected. Three of the neutral, two of the labor and one of the employer representatives were members of the original committee appointed in March 1946. The tentative membership list was submitted for approval to the Ministry of Welfare.

28. Thirty-three prefectural Labor Relations Committees had completed selection of new Committees by 30 April while 13 were in the process of choosing new membership.

Negotiations and Agreements

29. A number of major collective agreements were concluded during late March and April, including industry-wide contracts for coal miners, seamen, port and harbor and Occupation Force workers and employees of the Takeda Pharmaceutical Industry, Ltd. Conclusion of the agreements and the implementation of contracts concluded during late February and March, including government railway and communications workers and teachers, brought under recent agreements over half of total organized labor.

The contracts, terms of which were more specific than those of earlier agreements, generally provided for establishment of national and local labor-management councils as day-to-day negotiating bodies, thereby implementing in a number of important industries the principles embodied in the establishment of the labor-management Economic Reconstruction Council. Following the organization of the railway council during February, communications workers and officials started work on the council provided for in their contract signed during March.

All agreements included acceptance by the employer of the principle that the worker should be guaranteed a minimum livelihood, although a wage system based on the sliding-scale principle was provided only in the coal miners' agreement. Increasing acceptance of the sliding-scale principle as implementation of the minimum livelihood guarantee was indicated with the 18 April acceptance by the management of the Oriental Economist, whose president is also Minister of Finance, of workers' demands for establishment of a "minimum sliding-scale basic salary."

Each of the contracts was a master agreement including specific provision for supplementary local agreements.

30. Outstanding among the April agreements was the mining agreement. Formalizing the provisional agreement reached on 7 March, coal mine workers and operators on 12 April signed an industry-wide collective bargaining agreement which covered total

employment in the coal-mining industry, including 203,316 underground workers, 210,724 surface workers and 44,310 office workers.

Initially several member unions objected to the provisional agreement because regional differences in rates of incentive pay would result in regional variations in the amount of retroactive wage adjustment, but the disagreement was resolved by the following Coal Board commitments:

- (1) Release of coal miners' blocked accounts not in excess of amounts necessary to standardize retroactive payments for January, February and March.
- (2) Granting of extra rations of sake to each miner responsible for increased production for that period.
- (3) Immediate delivery of clothing to those areas adversely affected by the retroactive pay clause.

31. On 22 April the Minister of Education, the Education Reform Committee within the Ministry and the All-Japan Teachers' Unions Council reached agreement on interpretation of the two identical contracts signed in March between the Ministry of Education and these two major teachers' organizations.

On the ground that teachers are public-office holders, the Committee early in April criticized the agreements' closed shop, hours and other provisions and opposed granting to the scheduled labor-management council authority on teachers' placement and other policies.

The 22 April agreement clarified these provisions and stipulated that the projected council would mainly devote its efforts to improvement of teachers' pay and other working conditions.

32. Industry-wide negotiations begun several months ago were continued in the private railway, rolling stock and metal-mining industries. Employer claims of financial inability to meet union wage demands under current economic conditions and regional variations in financial ability to make even small wage increases complicated the situation and were largely responsible for failure to reach settlements.

Workers and management of the private railways accepted a Central Labor Relations Committee mediation plan covering the basic wages and workweek in the industry but detailed settlements of overtime premiums, special bonuses and regional allowances were to be worked out locally.

33. Federated rolling-stock workers formally dropped industry-wide wage negotiations and resumed bargaining at the local level.

The Central Labor Relations Committee undertook conciliation to avert a scheduled work stoppage in metal mines.

34. The Central Labor Relations Committee continued conciliation measures in the long-standing negotiations regarding personnel policy between radio workers and the Broadcasting Corporation of Japan.

Labor Dispute Statistics

35. Owing to the continuation of the government workers' dispute total workers involved in disputes occurring during February

remained almost the same as the January total although the number of workers involved in strikes increased.

Man-days idle owing to strikes and lockouts increased during February, largely as the result of the strike at the Kawasaki Plant of the Diesel Automobile Company involving 9,138 workers and lasting the entire month (24 workdays).

LABOR DISPUTES a/

<u>Disputes</u>	<u>December</u>		<u>January</u>		<u>February</u>	
	<u>Number</u>	<u>Workers Involved</u>	<u>Number</u>	<u>Workers Involved</u>	<u>Number</u>	<u>Workers Involved</u>
Acts of dispute						
Strikes	52	60,954	30	17,491	52	28,101
Slowdowns	14	8,734	9	2,316	14	1,462
Lockouts	6	464	10	717	6	260
Production control	<u>19</u>	<u>4,988</u>	<u>26</u>	<u>6,243</u>	<u>24</u>	<u>5,037</u>
Total	91	75,140	75	26,767	96	34,860
Not accompanied by acts of dispute <u>b/</u>	<u>10</u>	<u>1,433,770</u>	<u>16</u>	<u>1,436,780</u>	<u>22</u>	<u>1,444,381</u>
Grand total	101	1,508,910	91	1,463,547	118	1,479,241

a/ Includes both disputes beginning during the month and those carried over from the preceding month.

b/ Includes disputes where negotiations have broken down and a third party has intervened to assist adjustment.

SOURCE: Ministry of Welfare.

MAN-DAYS IDLE OWING TO STRIKES AND LOCKOUTS a/

	<u>Workers Involved</u>	<u>Man-days Idle</u>
December 1946	61,724	234,326
January 1947	18,208	275,458
February 1947	28,405	454,382

a/ Includes both disputes beginning during the month and those carried over from the preceding month.

SOURCE: Ministry of Welfare.

LABOR DISPUTES

	<u>Beginning</u>		<u>Carried Over</u>		<u>Total</u>	
	<u>Number</u>	<u>Workers</u>	<u>Number</u>	<u>Workers</u>	<u>Number</u>	<u>Workers</u>
Acts of dispute						
Strikes	35	24,529	17	3,572	52	28,101
Slowdowns	11	1,193	3	269	14	1,462
Lockouts	1	21	5	239	6	260
Production control	<u>2</u>	<u>233</u>	<u>22 a/</u>	<u>4,804</u>	<u>24</u>	<u>5,037</u>
Total	49	25,976	47	8,884	96	34,860
Not accompanied by acts of dispute b/	<u>7</u>	<u>7,229</u>	<u>15</u>	<u>1,437,152</u>	<u>22</u>	<u>1,444,381</u>
Grand total	56	33,205	62	1,446,036	118	1,479,241

a/ Includes one dispute with 44 workers involved which was recorded during January as a strike.

b/ Includes disputes where negotiations have broken down and a third party has intervened to assist adjustment.

SOURCE: Ministry of Welfare.

Labor Disputes

36. Increased Labor Relations Committee activity prevented occurrence of any major strike although coal mine negotiations were punctuated by several brief and localized walkouts.

37. After four months of unsuccessful bargaining, workers and management of the Toyo Watch Company on 22 April agreed to accept a mediation plan for wages and other working conditions proposed by the Saitama Prefectural Labor Relations Committee. The dispute was complicated by the existence of two rival unions with no clear-cut indication as to which represented the majority of the workers. The situation was resolved by the decision of the union affiliated with the National Congress of Industrial Unions to withdraw from the Congress and amalgamate with the second Toyo union, an affiliate of the General Federation of Japanese Trade Unions.

LABOR EDUCATION

38. The first coordinated union and Government labor-education program was launched on 16 April when officials of the new Workers' Education Bureau of the Ministry of Welfare and representatives of the Joint Labor Union Education Committee of the three major federations agreed to set up a Labor Advisory Committee to the Bureau. The Workers' Education Bureau was established late in March to conduct a broad education program for labor, employers and the general public on labor legislation and noncontroversial basic trade-union subjects. The Joint Labor Union Education Committee was formed by the federations two weeks later to maintain labor liaison with the Bureau.

The Labor Advisory Committee was to act as a permanent consultative body to the Workers' Education Bureau. Membership would consist of seven labor and six neutral representatives; one of the labor members was to act as executive secretary, paid by the Ministry and working full time within the Bureau.

39. Continuing widespread press comment on the need for more workers' education within the labor movement reached a peak with editorial criticism in leading newspapers and magazines directed at labor leaders, particularly those of the National Congress of Industrial Unions, for failing to keep their members informed on union affairs and general economic conditions.

Publications on Labor

40. An increase occurred in the number of publications on labor issued. Labor educators expressed pessimism over future publication plans, citing the increasing paper shortage and the mid-April decision of the Government Paper Allocation Committee to reduce paper rations generally and deny paper quotas for periodicals whose initial appearance had not been effected by 1 May.

41. The first broad text on the history and theory of trade-unionism, "A Textbook on Trade-unionism," by I. Ayusawa, prewar Japanese representative in the International Labor Organization and currently executive director of the Central Labor Relations Committee, was put on the market early in April.

PUBLICATIONS ON LABOR
April

<u>Issuing Office</u>	<u>Publication</u>
Political Education Association	"A Textbook on Trade-unionism," I. Ayusawa
Economic Reconstruction Council	A Guide to the Economic Recon- struction Council
Central Labor College	The Wagner Act <u>a/</u> United Automobile Workers' "Con- tract with the Chrysler Cor- poration, 1945" and "Contract with the General Motors Cor- poration" <u>a/</u> Labor Yearbook of 1947 <u>b/</u> Central Labor College Review <u>c/</u>
Ministry of Communications	Communications Labor <u>c/</u> SCAP's "The Duties of a Shop Steward" <u>a/</u> and "The Purpose and Means of Workers' Educa- tion" <u>a/</u>
Federation of Coal Operators	National Association of Manufac- turers' "Collective Bargaining: A Management Guide" and "Good Industrial Relations" <u>a/</u> The Readers' Digest's "The End of the Labor Monopoly" <u>a/</u> Nippon Times' "Democracy and Labor Unions" and "Political Activities of Labor Unions" <u>a/</u> United Mine Workers' "Bituminous Wage Agreement for 1945" and "Appalachian Wage Agreement for 1946" <u>a/</u> Report on Recent Labor Negotia- tions

Issuing OfficePublication

Tokyo Coal Operators' Association	Central Labor Relations Committee's "Report on Coal Mines Situation"
Kanto Employers' Association	U. S. Department of Labor's "Safety through Management" <u>a/</u> Tokyo-Yokohama Industry <u>b/</u> The Management Magazine <u>c/</u> Diamond <u>c/</u>
Japan Federation of Industries	Industrial Report <u>c/</u>
Federation of Economic Organizations	Economic Materials <u>c/</u>
National Congress of Industrial Unions	Labor Front <u>a/</u>
Dr. Matsui, Doshisha University	History of the American Labor Movement
SCAP	Trade-unionism: The Dangers of Undemocratic Totalitarian Control

a/ Translation.
b/ Second edition.
c/ Recurrent.

Labor-Management Libraries

42. New prefectural labor-management libraries with the Ministry of Welfare's assistance were being stocked with available texts on labor, all important periodicals issued by labor and employer organizations and 20 basic SCAP publications on trade-union subjects. Two additional libraries were established in major cities of Saitama Prefecture.

Labor Schools

43. Labor schools covering trade-unionism, collective bargaining procedures and other labor matters included the following:

LABOR SCHOOLS

<u>Sponsor</u>	<u>Date</u>	<u>Attendance</u>
General Federation of Japanese Trade Unions	17-18 March <u>a/</u>	150 women-unionists
City of Tokyo	24-29 March	60 trade-unionists
Central Labor College	14-19 April <u>b/</u>	90 students, largely union members
Osaka Military Government Team	13 March-29 April <u>c/</u>	300 union leaders and management representatives
Kanagawa Military Government Team	26 March	500 trade-unionists

a/ Second of a series.
b/ First of a series of afternoon workers' institutes.
c/ Series of lectures.

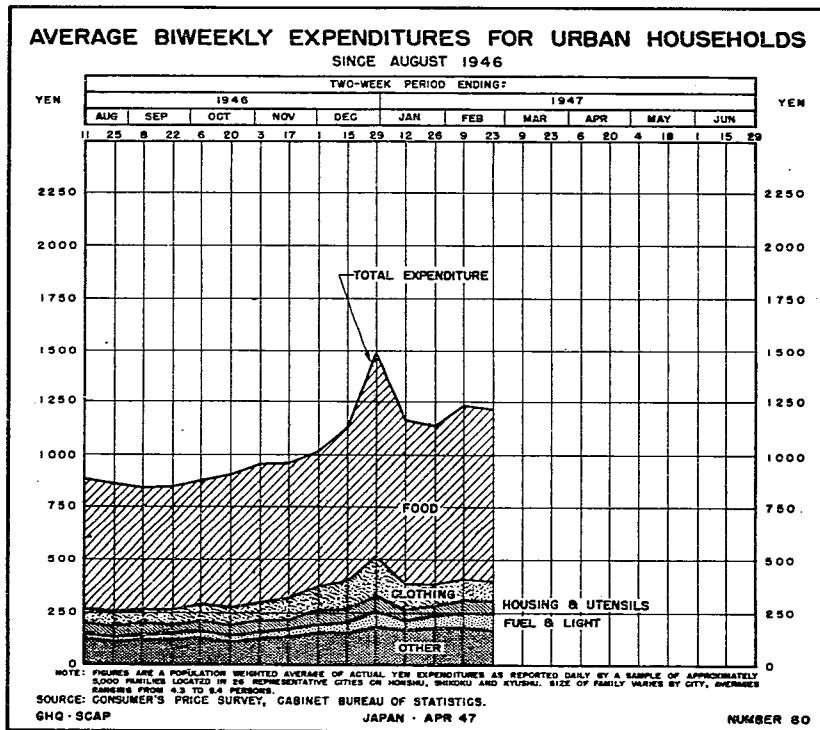
In addition the third in a series of institutes arranged jointly by Japanese Government officials and Military Government teams to promote the usefulness of women's organizations was held in Yokohama on 1-2 April, attended by some 9,000 women leaders from labor and other groups. Discussions included problems of women in industry and child labor in Japan.

WAGES AND WORKING CONDITIONS

44. Government arrests of black-marketeers, prosecution of farmers failing to turn in their rice quotas and other efforts to improve the food situation continued. A plan to revise the rationing system was announced but official food rations still lagged behind schedules. Consumer goods became increasingly scarce and the cost of living continued to increase.

45. Absenteeism by workers taking "food holidays" to visit the country in search of food, which ceased last fall with the harvest, again became a problem. Production was hampered in several instances, including iron and paper currently in short supply.

46. February figures on biweekly family expenditures rose slightly over January.



47. The Wage Investigation Commission during April established two subcommittees, the first to formulate Commission policy on general economic matters and the second to deal with the more specific technical problems of minimum wages and cost of living. Membership included both Commission members and the technical advisers appointed during March.

Both subcommittees immediately began the collection and study of relevant data.

48. At a meeting on 15 April of the preparatory committee for the Advisory Committee for the Investigation of the Improved Treatment of Government Employees, members representing the Government and government workers' unions reached agreement on a new pay scale for government employees retroactive to 1 April.

By terms of the agreement total monthly pay, including increased area differentials and higher family allowances, would average approximately ¥ 1,500, 25 percent over the current ¥ 1,200 monthly average which resulted from temporary wage increases granted in February.

Basic wages were classified according to the job and its duties and responsibilities, with minimum levels specified by age to ensure all workers a minimum livelihood. The Committee was to continue consideration of plans to effect a balanced wage structure.

Budgetary considerations prevented immediate implementation of the wage agreement but officials were working out the financial problems involved.

49. All government and Occupation Force workers were given half holidays on the three election days which fell on working days. Adoption of a similar policy by private employers was urged by the Government.

50. On 21 April the All-Japan Coal Mining Association reported that between March 1946 and March 1947 miners' productivity averaged 5.45 tons of coal per worker per month, with a June low of 5 tons and a December high of 6.1 tons.

As a result of the prohibition on employment of women underground, the number of women surface workers had risen from 39,100 in April 1946 to 51,100 on 1 April 1947.

Absenteeism was lowest in December, at 10 percent of the total payroll, and highest in the May-June 1946 period when 16 percent of the workers stayed away from work, many in order to engage in spring planting.

EMPLOYMENT AND UNEMPLOYMENT

51. Dwindling raw materials stockpiles and interruption in power supply, forcing full or partial shutdowns in a number of plants and presaging curtailments in the public works program, prevented an increase in the level of employment and full utilization of workers employed. Indications were that the Government program to encourage unemployed persons to take up farming, initiated in late 1946, did not reduce unemployment appreciably.

Manpower Utilization

52. Representatives of the Economic Stabilization Board and the labor-management Economic Reconstruction Council met in Tokyo on 9 April to discuss means for efficient utilization of manpower underemployed within industry owing to faulty techniques of production engineering and shortages in material and power supply. A tentative program was outlined, pending discussion by the organizations' members, to launch a joint survey on the problem.

Employment Security Offices

53. To acquaint the public with the significance of the employment exchange reorganization of 8 April and to attract unemployed persons to the exchanges, a nationwide education program to extend over a two-month period was launched by the Ministry of Welfare. Commencing with an explanatory press release on 2 April, six days before issuance of the Ordinance, the program featured rallies, posters and radio spot features and an official letter was sent to each prefectural governor requesting inauguration of similar local publicity campaigns.

54. Recruitment and placement policies for the reorganized employment security bureaus, issued to prefectural governors on 10 April by the Ministry of Welfare, included the following points:

- (1) Recruitment and placement should be done without compulsory or unfair treatment and without preference other than the priority given to Occupation Forces and the critical coal, textile and steel employment.
- (2) Only vacancies having the working conditions prescribed by the Labor Standards Law should be filled and placement should be from within the establishment's labor market area.
- (3) To satisfy both workers and employers, active efforts to locate job vacancies and job applicants should be made, with accurate advertisement. Use by employment security bureaus of "labor bosses" was forbidden. Permission for direct recruitment by employers outside the labor market areas was to be given only for those critical industries where the employment bureaus could not obtain an adequate force and only if they complied with recruitment and employment regulations. Through vocational guidance workers should be referred to jobs for which they were best fitted.
- (4) Employers in critical industries should be encouraged to study and correct causes of turnover. Methods of training skilled workers and improving efficiency of unskilled workers should be instituted in factories and workshops.

Labor Market Survey

55. First reports of the local labor-market surveys were received by the Ministry of Welfare and work on plotting the labor market areas of the country began. Areas were to be determined first for Kumagaya, where the initial local survey was made, and Tokyo, selected as representative of large cities. On the basis of this plotting, standard procedures for determining the other areas were to be established.

Vocational Training

56. With the end of the six-month term in March, the number of students enrolled in vocational training establishments decreased by 1,849 to a total of 13,666 (11,744 men and 1,922 women) and courses under way numbered 425 in 360 establishments.

57. First result of a Ministry of Welfare program to establish national standards for vocational training was the completion of standard course outlines for the training of carpenters and ships' carpenters and for instruction in civics, to be included in all training courses. Outlines specified the number of hours to be spent in classroom and shop as well as topics to be covered. Preparation of similar outlines for other courses was in process.

58. Persons enrolled in the Government-subsidized "jusan" or handicraft work centers increased slightly during March to a total of 102,655 (30,237 men and 72,418 women) in 2,020 establishments. In addition, persons working at home on "jusan" materials totaled 61,213 (8,170 men and 53,043 women) on 31 March.

59. Factories receiving financial assistance from the Government in order to reduce total unemployment increased by 12 to a total of 103 during March. Employment increased by 1,146 to a total of 3,522 workers. The Ministry of Welfare during April began revision of requirements for granting financial assistance.

60. Enrollment during March in the new training establishments for seamen totaled 417 persons. At the end of April Ministry of Welfare officials announced an enrollment goal of 1,600 students for each six-month term.

Recruitment Programs

61. Recruitment continued to more than offset persons leaving the coal, textile and raw silk industries during March. The textile and raw silk employment increases were lower than in February while the gain in coal mining remained about the same.

RECRUITMENT AND EMPLOYMENT IN TEXTILE, RAW SILK AND COAL INDUSTRIES

Industry	Employed	Recruitment	Number	Number	Net	Employed
	28 Feb	Goals	Recruited	Leaving		
		Jan-Mar	March	Jobs	Change	31 Mar
Textile a/						
Cotton spinning and weaving	86,681	30,730	6,374	4,679	+1,695	88,376
Silk spinning and weaving	13,750	6,460	916	560	+356	14,106
Woolen and worsted	26,254	9,080	886	600	+286	26,540
Hard fiber	11,375	2,164	680	665	+15	11,390
Rayon yarn and rayon staple	21,772	7,391	565	1,102	-537	21,235
Rayon pulp	<u>3,169</u>	<u>55</u>	<u>18</u>	<u>27</u>	<u>-9</u>	<u>3,160</u>
Total	163,001	55,880	9,439	7,633	+1,806	164,807
Raw silk	71,150	24,135	3,301	2,370	+931	72,081
Coal	374,146	40,000	20,897	15,658	+5,239	379,385

a/ Excluding 278,196 workers in small-scale mills.

SOURCE: Textile Association, Raw Silk Association and Coal Board.

62. On 16 April the Ministry of Welfare released summary reports on employment in coal mines and textile and raw silk industries for the period December 1945-March 1947.