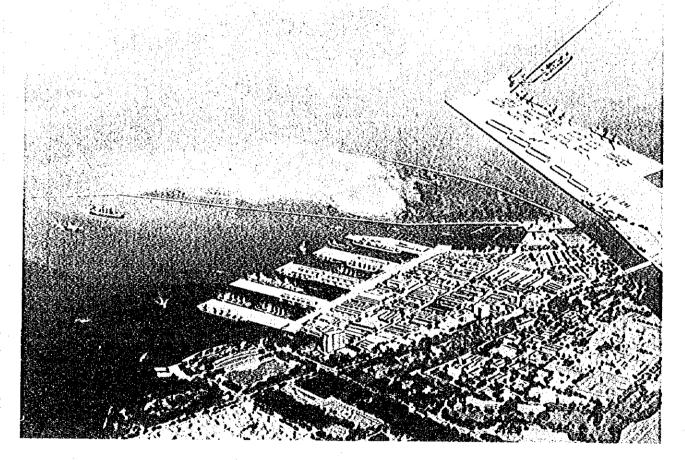
社会開発協力部報告書 VOLUME 2 MAIN REPORT

# MANILA SOUTH PORT REHABILITATION PROJECT

**REPUBLIC OF THE PHILIPPINES** 



FEASIBILITY STUDY

# **FINAL REPORT**

**JUNE 1987** 

JAPAN INTERNATIONAL COOPERATION AGENCY



No.



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### PREFACE

In response to a request of the Government of the Republic of the Philippines, the Government of Japan has decided to conduct a feasibility study on the Manila South Port Rehabilitation Project, and entrusted the study to the Japan International Cooperation Agency (JICA).

JICA sent to the Philippines a study team headed by Mr. Terumi Iijima, Executive Director, the Overseas Coastal Area Development Institute (OCDI), several times from April 1986 to March 1987.

The team exchanged views with the officials concerned of the Government of the Republic of the Philippines on the project, conducted field surveys and collected reference materials. After the team returned to Japan, further studies were made and the present report has been prepared.

I hope that this report will serve for the promotion of the Manila South Port Rehabilitation Project and contribute to the friendly relations between our two countries.

I wish to express my deep appreciation to all the officials concerned of the Government of the Republic of the Philippines for the close cooperation extended to the team.

June 1987

Keisuke Arita President Japan International Cooperation Agency

LETTER OF TRANSMITTAL

June 1987

Mr. Keisuke Arita

President

Japan International Cooperation Agency

Dear Mr. Arita:

It is my great pleasure to submit herewith the Report for the Feasibility Study on the Manila South Port Rehabilitation Project in the Republic of the Philippines.

This report is the result of studies carried out by the Overseas Coastal Area Development Institute of Japan and Nikken Sekkei Ltd. at the request of the Japan International Cooperation Agency. Regarding this project, our study team conducted four series of field surveys, one of which took place for 75 days from June 16, 1986, to collect a variety of data including data concerning natural conditions.

The findings of these surveys were discussed to review the Master Plan and to study the feasibility of the Manila South Port Rehabilitation Project, and were then compiled into this report. The study shows that the Project is extremely important, so I hope the Project is executed promptly.

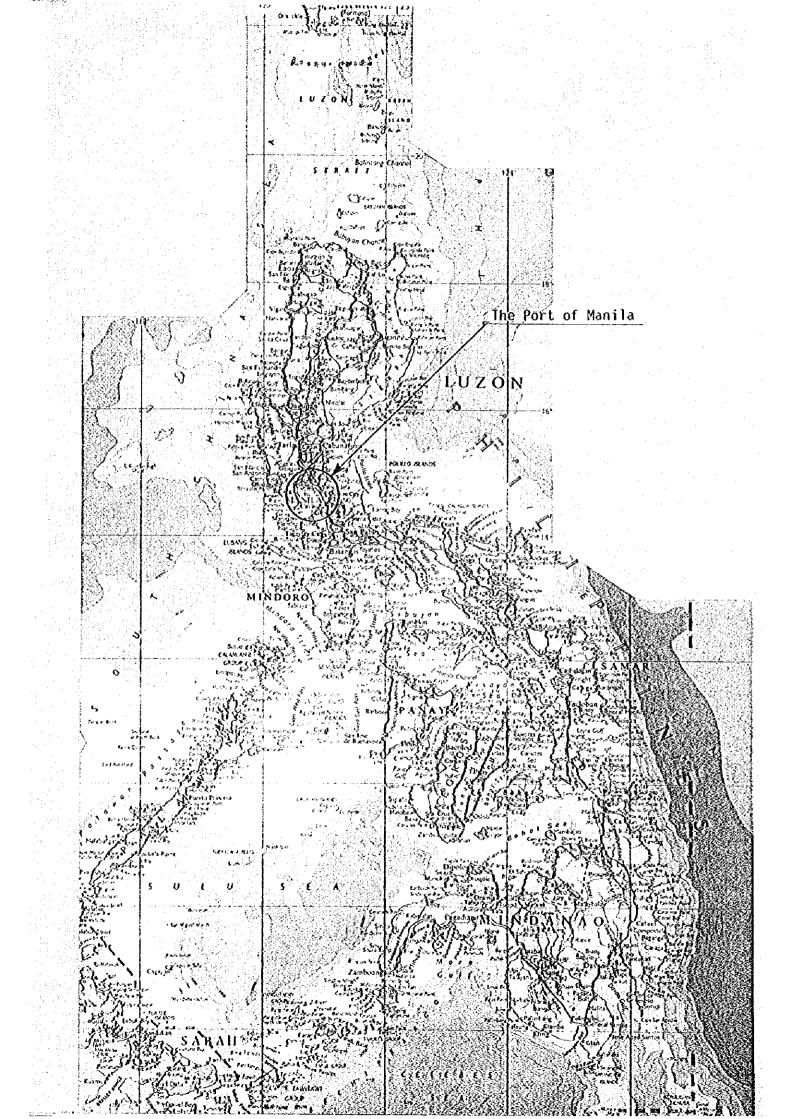
On behalf of the study team, let me express my heartfelt thanks to the Philippine Port Authority and to the other related agencies of the Philippine Government for the generous cooperation, assistance and warm hospitality which were extended to the study team during their stay in the Philippines.

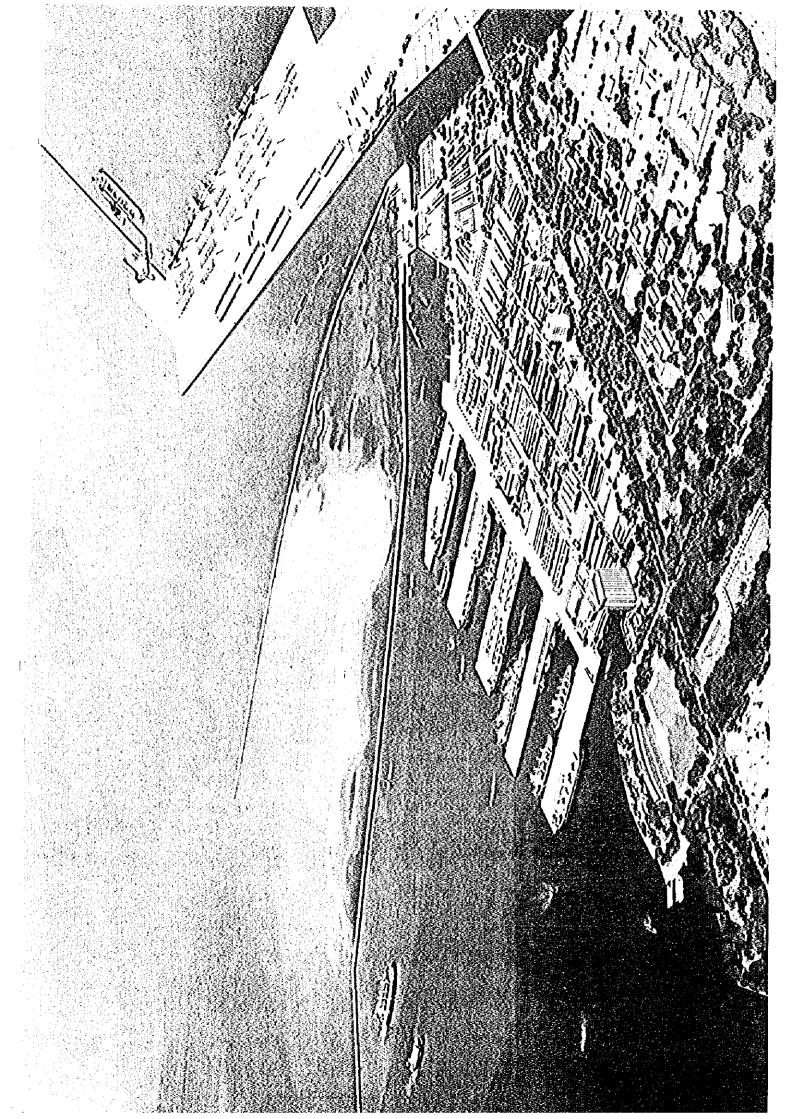
Our thanks are also due to the Japan International Cooperation Agency, the Ministry of Transport, the Ministry of Foreign Affairs and the Japanese Embassy in Manila for their valuable advice and support during the field surveys and the preparation of this report.

Yours faithfully,

uma

Terumi Iijima Head Japanese Study Team for the Manila South Port Rehabilitation Project (Executive Director, the Overseas Coastal Area Development Institute of Japan)





### EXCHANGE RATE \$ 1 = P 20.5 \$ 1 = ¥ 154

### ABBREVIATIONS

	ABBREVIATIONS
4.5.5	
ADB	Asian Development Bank
AC&P	Atlantic Gulf and Pacific Corp. Manila
BAECON	Bureau of Agricultural Economics
BAEX	Bureau of Agricultural Extension
BBTI	Batangas Bay Terminal Incorporated
BCGS	Bureau of Coast Geodetic Survey
BEU	Bureau of Energy Utilization
BFAR	Bureau of Fishery Aquatic Resources
8FD	Bureau of Forest Development
BM	Bench Mark
BMG	Bureau of Mining Group
BOC	Bureau of Customs
BOI	Board of Investments
вом	Bureau of Mining
СВ	Central Bank
DWT	Dead Weight Tonnage
EPZA	Export Processing Zone Authority
EIRR	Economic Internal Rate of Return
FPA	Fertilizer and Pesticide Authority
FAO	Food and Agricultural Organization of the United Nations
GDP	Gross Domestic Product
FRR	Financial Internal Rate of Return
GNDP	Gross National Domestic Product
GNP	Gross National Product
GRDP	Gross Regional Domestic Product
Gs	Specific Gravity of Soil Particles
GRT	Gross Registered Tonnage
СТ	Gross ton(s)
IBRD	International Bank for Reconstruction and Development
JETRO	Japan Trade Center
JICA	Japan International Cooperation Agency
JIS	Japan Industrial Standards
MARINA	Maritime Industry Authority
MHS	Ministry of Human Settlement
MICT	Manila International Container Terminal
MIRDP	Mindoro Intergrated Rural Development Plan

MLLWL	Mean Lowest Low Water Level
MOA	Mean Lowest Low water Level Ministry of Agriculture
MOA	Ministry of Energy
MMA	Metropolitan Nanila Area
MTI	Ministry of Trade and Industry
MOTC	Ministry of Transportation and Communications
мржн	Ministry of Public Works and Highways
MT	Metric Ton(s)
NEDA	National Economic Development Authority
NCA	National Coal Authoriy
NCC	Northern Cemment Corporation
NCR	National Capital Region
NCSO	National Census and Statistics Office
NEPC	National Environmental Protection Council
NFA	National Food Authority
NIEP	Nationwide Industrial Estate Program
NSC	National Steel Corporation
NTPP	National Transportation Planning Project
OCDI	Overseas Coastal Area Development Institute of Japan
OECF	Overseas Econome Cooperation Fund
PAGASA	Philippine Atomospheric Geographical and Astronomical
	Service Administration
PASTORA	Planning Assistance Service to Rural Areas
PCA	Philippine Coconut Authority
PCIA	Philippine Cement Industry Authority
<b>PFDA</b>	Philippine Fishery Development Authority
PFM	Pacific Flour Mills
PHILSUCOM	Philippine Sugar Commission
PMU	Port Management Unit
PNCC	Philippine National Construction Company
PNOC	Philippine National Oil Company
PNR	Philippine National Railways
P	Peso(s)
PPA	Philippine Ports Authority
qu	Unconfined compressive strength
RT	Revenue Ton(s)
SPT	Standard Penetration Test
TEU	Twenty-foot Equivalent Units
UDS	Undisturbed Sample
•	

UNICH	EM	United Coconut Chemicals, Inc.
W		Water Content
\$		United States Dollar(s)
¥	: .	Japanese Yen
PMU M	anila	Port Management Unit (Manila)
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### CONTENTS

## CONCLUSIONS AND RECOMMENDATIONS SUMMARY

CHAPTER	1 1	NTRODUCTION	1
	1.1	Background	1
a the sec	1.2	Objectives of the Study	1
· ·	1.3	Circumstances.,	2
	1.4	Scope of the Study	2
	1.5	Study Schedule	3
	1.6	Organization of the Study Team	4
· ·	1.7	List of PPA Counterparts	4
CHAPTER	2 S	OCIO-ECONOMIC BACKGROUND	7
	2.1	General Introduction	7
	2.2	Population and Employment	7
	2.3	National Economy	15
	2.4	Transportation	23
	•		
CHAPTER	3 P	RESENT SITUATION OF THE PORT	33
	3.1	Natural Conditions	33
	3.2	Existing Port Facilities and Equipment	73
	3.3	Structural Survey at South Harbor	102
ta ang sa ta	3.4	Structural Survey at North Harbor	120
	s -		
CHAPTER	4 P	RESENT SHIPPING AND CARGO THROUGHPUT	135
	4.1	General	135
	4.2	Present Shipping	140
	4.3	Cargo and Passenger Traffic	152
	4.4	Utilization of Port Facilities	163
CHAPTER	5 P	ORT MANAGEMENT AND FINANCE	173
	5.1	Port Organization and Management	173
		Port Finance	185
	- 11 - C		
CHAPTER	6 D	EMAND FORECAST	191
. • .	6.1	General	191
	÷		

	6.2 Future Soico-Economic Framework	
	6.3 Cargo Traffic Forecast	197
CHAPTER	7 REVISED MASTER PLAN	247
	7.1 Fundamentals of the Master Plan	247
	7.2 Planning Premises	256
	7.3 Analysis of Existing Port Capacity	273
· · · ·	7.4 Proposed Scale of Berthing Facilities	280
	7.5 Required Size of the Storage Facilities	289
	7.6 Proposed Layout Plan	293
	7.7 Anchorage Planning (Mooring Basin)	314
	7.8 Land Use Plan	316
	7.9 Land Access	326
	7.10 Probable Sites for the Development of Bulk Terminals	338
CHAPTER	8 THE SHORT-TERM REHABILITATION PLAN	343
	B.1 Basic Concept	
	8.2 Planning Premises	344
	8.3 Improvement of Grain Handling	
-	8.4 Proposed Rehabilitation Plan	350
CHAPTER	9 DESICN, CONSTRUCTION METHOD, CONSTRUCTION SCHEDULE	
	AND COST ESTIMATE	
	9.1 Ceneral	353
	9.2 Design Conditions	
	9.3 Structural Design	
	9.4 Construction Method/Procedure	
	9.5 Construction Schedule	
	9.6 Cost Estimate	365
CHAPTER	10 ADMINISTRATION AND OPERATIONS	
	10.1 Present Adiministrative and Operational Problems	
	10.2 Administrative Recommendations	
na a di sa sa sa	10.3 Proposed Operation System	374
CHAPTER	11 ECONOMIC ANALYSIS	385
	11.1 Purpose and Methodology of the Economic Analysis	
	11.2 Prerequisites of the Economic Analysis	
1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -	11.3 Benefits	390
•		en de Transforme

										. 405 . 406 . 406 . 407 . 407 . 409 . 420
								·		
		11.4	Costs	• • • • • • • • • • •						397
		11.5	and the second	Pricing.						
25 		11.6	and the second	Lon						405
		11.7	and the second second	ity Analys						406
		11.8		lon						406
. '										· ;
	CHAPTER	12 FI	NANCIAL /	NALYSIS						407
		12.1	Purpose	and Method	lology	of the Fi	nancial	Analysi	s	407
		12.2	Financia	al Analysis	s of PP	A				409
	•	12.3	Appraisa	al of the l	Profita	bility of	the Pro	ject It	self	420
÷.,		12.4	Sensitiv	ity Analys	sis	••••				422
		12.5	Conclusi	ion						422
							· · ·			· .
· .			•		· ·				• .	
		:								
-										
										·
	· ·									
ji.										
1 										
		· · · ·							·	
÷.,									:	
1 - 1 										
			-							
			."						·	
		• • •								
	· · · ·		· · ·							
:										
÷				· .						
			· . ·							

	· .		
	•		
			LIST OF TABLES
		1 a. 14 a.	
	Tabl	le No.	Page
	Table	2.2.1	Population and Growth Rate by Region for Census Years 9
	Table	2.2.2	Population Projections for the Philippines by Region
			1980 - 200511
	Table	2.2.3	Labor Force Participation Rate and Employment Status 14
	Table	2.2.4	Employed Persons by Major Industry Group
	Table	2.2.5	Employment in MMA 14
	Table	2.3.1	Gross Domestic Product by Expenditure at Constant 1972
		• •	Prices
	Table	2.3.2	Gross Domistic Product at Constant 1972 Prices
	Table	2.3.3	Gross Domestic Product by Region
	Table	2.3.4	Per Capita Gross Domestic Product by Region
	Table	2.3.5	Balance of Trade
	Table	2.3.6	Exports (Traditional and Non-traditional)
	Table	2.3.7	Imports by Commodity Group
	Table	2.3.8	Imports by Area 22
	Table	2.3.9	Exports by Area 22
	Table	2.4.1	Philippine Port System by Port Management Unit: 1986 27
	Table	2.4.2	Philippine Domestic Operating Fleet by Type of Vessel:
			1982 and 1983 28
	Table	2.4.3	Philippine Registered Overseas Fleet by Type of Vessel:
			1982 and 1983 29
	Table	2.4.4	Domestic Passenger Traffic by Major Ports:
			1982 and 1983 30
	Table	2.4.5	Cargo Movement by Major Ports at Berth and Anchorage:
		· ·	198331
	Table	2.4.6	Number and Tonnage of Vessels Entered and Cleared in
			Selected Ports, Domestic and International: 1979-1984 32
	Table	3.1.1	Frequency of Typhoons Crossing the Philippines 43
	Table	3.1.2	Frequency of Typhoons in Metro Manila
	Table	3.1.3	Result of Wave Hindcasting
1994 1997	Table	3.1.4	25-Year Dredging Record for Manila South Harbor
	Table	3.1.5	Laboratory Results of the Soil Investigations
	Table	3.1.6	Geological Age and Features
	Table	3.1.7	Summary of the Characteristics of the Strata of South
			Harbor
	14 - 1 1		

	, the second		
	Table	3.1.8	Summary of the Characterisitics of the Strata of North
		· · · · ·	Harbor
	Table	3.1.9	Design Coefficient of Bearing Capacity
	Table	3.2.1	List of Cargo Handling Equipment (South Harbor)
:		3.2.2	List of Facilities in North Harbor
	Table	3.2.3	List of Facilities in MICT
÷ .	Table	3.2.4	Small Craft (Number)10
		3.3.1	Survey Items
	Table		Criteria of Visual Inspection10
	Table	3.3.3	Evaluation Terms10
	Table	3.3.4	Investigation Items11
	Table	3.3.5	Overall Evaluation of the Piers
	Table	4.1.1	List of Output Table1
	Table	4.1.2	Volume of Cargo Handled at the Port of Manila
	Table	4.1.3	Ship Arraivals at the Port of Manila1
	Table	4.2.1	Arraival of Oceangoing Ships at the Port of Manila1
•	Table	4.2.2	Shipping Activity at the Port of Manila (1985)
	Table	4.2.3	Arrival of Domestic Ships at the Port of Manila15
	Table	4.3.1	Historical Trend of Foreign Trade Cargo Voume Handled
	Tuero		at the Port of Manila15
	Table	4.3.2	Estimated Voume of Cargo Handled at the Port of Manila
an a			by Packing Type 19851
· ·	Table	4.3.3	Estimated Percentage of Cargo by Packing Type by
e in	Tubio		Commodity at Manila in 19851
	Table	4.3.4	Historical Trend of Containerized Cargo Volume
	Table		of Foreign Trade Handled at the Port of Manila1
	Table	4.3.5	Percentage of Containerized Cargo in Total Foreign
÷	Table		Trade Cargo at the Port of Manila
	Table	4.3.6	Passenger Traffic at the Port of Manila1
	· · · · · · · · · · · · · · · · · · ·	4.4.1	Mooring Facility Use (Oct Dec., 1985)1
:	n an	4.4.2	Monthly Average Utilization of Sorting and Storage
	14010		Facilities in 1985 South Harbor
	Table	4.4.3	Cargo Flow at the Wharves of South Harbor
	Table	5.1.1	Philippine Ports Authority Organization Chart
	Table	가지 같다.	
	14010	<i>J.C</i>	of PMU Employees1
÷ .	Table	5.1.3	Berthing Procedure and Operation Flow
	Table	5.1.4	Actual Cargo Handling Productivity
	Table	5.1.5	Actual Average Rate of Standby/Lost Time
a Late	Taure	J+1+J	The second

			e States - S
Table		Cause of Standby/Lost Time182	• •
Table	5.2.1	Summary of Past Financial Performance of PPA	н н н
Table		Summary Balance Sheet of PPA186	
Table	5.2.3	Revenue from Operations by PMU's	
Table	5.2.4	Net Income from Operations by PMU's	
Table	5.2.5	Summary of the Past Financial Performance of PMU	
		Manila	
Table	5.2.6	Summary Balance Sheet of PMU Manila	
Table	6.1.1	Commodity Classification	÷.,
Table	6.2.1	Future Socio-Economic Framework	
Table	6.3.1	Estimated Foreign Cargo Volume of Manila by	
÷		Macroscopic Forecast	•
Table	6.3.2	Projected Total Consumption of Wheat	÷ .
Table	6.3.3	Forecast Wheat Imports through Manila	
Table	6.3.4	Import of Other Cereals through Manila	
Table	6.3.5	Production and Consumption Balance of Corn	
		in Philippines	
Table	6.3.6	Import of Feed into the Philippines and through Manila	
		Port	
Table	6.3.7	Estimated Number of Commercial Hogs and Poultry213	· .
Table	6.3.8	Future Consumption of Soybean Meal in the Philippines214	
Table	6.3.9	Estimated voume of Soybean Meal Imports through Manila215	
Table	6.3.10	Summary of Feed Imports through Manila	
Table	6.3.11	Import of Paper and Pulp in the Philippines217	
Table		PHILPHOS annual production capacity	
Table		Estimated Fertilizer Production for the Domostic	
	en an ei Frister ei	Market	est L
Table	6.3.14	Estimated Fertilizer Consumption in the Philippines220	-
Table	6.3.15	이 같은 것은 것을 알았는 것을 가지 않는 것을 가지 않는 것을 가지 않는 것을 하는 것을 수 있다. 것을 하는 것을 하는 것을 하는 것을 수 있는 것을 것을 수 있는 것을 수 있는 것을 것을 수 있는 것을 수 있는 것을 수 있는 것을 것을 수 있는 것을 것을 수 있는 것을 수 있는 것을 것을 수 있는 것을 수 있는 것을 것을 수 있는 것을 것을 것 같이 않는 것을 것 같이 않는 것을 것 같이 않는 것을 것 같이 않는 것 같이 않는 것 같이 않는 것 같이 않는 것 않는 것 같이 않는 것 같이 않는 것 같이 않는 것 같이 않는 것 않는 것 않는 것 같이 않는 것 같이 않는 것 않는 것 않는 것 같이 않는 것 않는 것 같이 않는 것 않는 것 같이 않는 것 않는 것 않는 것 같이 않는 것 않는	
Table	6.3.16	Demand for Steel products in the Philippines223	e de la
Table	6.3.17	Estimated GDP and Construction Sector GDP	n Tali Ali Anto
Table	6.3.18	Estimated Steel Demand in the Philippines	* . • .
Table		Estimated Steel Demand in the Entire Metropolitan Area224	· .·
Table	6.3.20	Production Capacity for End Users	
Table	6.3.21	Forecast Steel Cargo Voume at the Port of Manila and	
- 4040		at Batangas Port	· ·
Table	6.3.22	Estimated Import Value of Machinery and Transport	 -
- 4010			
Table	6 2 22	Equipment and Average Annual Growth Rate	
Table	<u>, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,</u>	Estimated Import Voume of Other Commodities	

	Table	6.3.24	Exports of Fish and Fish Products in the Philippines232
	Table	6.3.25	
	Table	0.3.29	at Manila
	<b></b>	6 2 26	Export of Copra Meal/Cake in the Philippines
	Table	6.3.26	
:	Table	6.3.27	Estimated Average Annula Growth Rate of Exports
		6 2 20	of Coffee, Fruits and Vegetables
	Table	6.3.28	Estimated Exports of Coffee, Fruits and Vegetables
:		<i></i>	at Manila
	Table	6.3.29	Estimated Other Food Exports at Manila236
	Table	6.3.30	Average Annual Growth Rate of Forest Products Export
· · ·			Volume
	Table	6.3.31	Projected Production of Processed Wood Products238
	Table	6.3.32	Export of Coconut except Copra and By-products240
	Table	6.3.33	Estimated Export Voume of Other Commodities241
	Table	6.3.34	Summary of Foreign Trade Cargo Forecast241
	Table	6.3.35	Comparison of Cargo Forecasts242
й. С	Table	6.3.36	Domestic Trade at Manila242
	Table	6.3.37	Estimated Domestic Cargo to be Handled at Manila244
	Table	6.3.38	Commodity Throughput by Packing type at the Port
		an an Argela. An an Argela	of Manila (1985)244
	Table	6.3.39	Estimated Percentage of Packing Type and Containerizable
			Ratio by Major Commodity245
	Table	6.3.40	Containerization rate at the Port of Manila246
	Table	6.3.41	Estimated Cargo Volume by Packing Type246
	Table	7.1.1	Piers and Berths252
	Table	7.1.2	Open Storage Areas and Sheds on the Piers253
	Table	7.1.3	Container Yards, Wharehouses and Buildings behind
		· • ·	the Piers
	Table	7.2.1	Estimated Foreign Trade Cargo Volume by Packing Type
			by Area
	Table	7.2.2	Shipping Activity in South Harbor
·	Table	7.2.3	Estimated Future Cargo Volume by Ship Type by Packing
			Type at the Piers of South Harbor
	Table	7.2.4	Estimated Cargo Volume at South Harbor by Ship Type
			by Class
1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -	Table	7.2.5	Estimated Number of Calling Ships at South Harbor272
	Table	7.3.1	Simulation Input data (Existing Capacity Test)
	Table	7.3.2	Results of Simulation Tests (Existing Capacity)278
	Table		Required Area of Sheds and Open Storage Areas
÷.,			

Table 7	6.1 Evaluation of the Alternative Plans	08
Table	6.2 Simulation Imput Data	12
Table 7	6.3 Results of Simulation Test	13
Table 7	7.1 Future Shipping Activities at Anchorage	15
Table 7	8.1 Land Use Area	25
Table 7	9.1 Traffic Volume (Total) in 1986	31
Table 7	9.2 Traffic Volume (Total) in 1995	32
Table 7	9.3 Traffic Volume (Total) in 2005	33
Table 7	9.4 Volume Capacity Ratio (1986 - 2005)	34
Table 7	9.5 Saturation Ratios at Intersections	34
Table 7	9.6 Cate Capacity Check	-
Table 8	2.1 Summary of Cargo Movement at South Harbor in 199534	
Table 8	2.2 Summary of Shipping at South Harbor in 1995	
Table 8	2.3 Calculation Results for Required Number of Berths	
14- 14-	in 1995	17
Table 9		
Table 9		
Table 9	5.1 Construction Schedule (Short-Term Rehabilitation Plan)36	
Table 9	5.2 Tentative Construction Schedule (Master Plan)	
Table 9		
Table 10		
Table 11		
Table 11	그는 사람이 있는 것 같은 것을 많은 것 같은 것	
Table 11		
Table 11.		
Table 11		· .
Table 11		1 A. J. A.
Table 12.		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Table 12.	"你们,你们们们,你们们们们,你们们就是你们的你们,你们们们们的你们,你们们就是你们的你们,你们们们们们们们,你们们们们们们们,你们们们不是你们的吗?"	
Table 12.		
Table 12		
		3

		LIST OF FIGURES
	Fig.No.	Page
	Fig. 2.1.1	Regional Map of the Philippines
	Fig. 2.4.1	Philippine National Railways 25
	Fig. 2.4.2	Location of Major Ports
2	Fig. 3.1.1	Location Map
	Fig. 3.1.2	Manila Bay and Surrounding Area
	Fig. 3.1.3	Topographic Map of Port Area 39
•	Fig. 3.1.4	Oceanographic Data of Manila Bay
	Fig. 3.1.5	Flow of Wave Hindcasting
	Fig. 3.1.6	Relationship Between Ruturn Period and Wave Height
		at Manila Port
	Fig. 3,1.7	Siltation Condition in South Harbor
. '	Fig. 3.1.8	Boring Locations in South Harbor
	Fig. 3.1.9	Boring Locations in North Harbor
	Fig. 3.1.10	Physiographic Provinces Luzon 59
	Fig. 3.1.11	Geological Map
į.	Fig. 3.1.12	Schematic Geological Profile
	Fig. 3.1.13	Soil Profile of South Harbor (1 of 2)
	Fig. 3.1.14	Soil Profile of South Harbor (2 of 2)
:-	Fig. 3.1.15	Soil Profile of North Harbor
	Fig. 3.1.16	Epicentre Map 72
	Fig. 3.2.1	Typical Section of Piers of South Harbor
	Fig. 3.2.2	Berth Length and Depth
: •	Fig. 3.2.3	Result of Investigation for Fender
	Fig. 3.2.4	Location of Existing Facilities in South Harbor
	Fig. 3.2.5	Location of Existing and Planned Lighthouses and Buoys 83
	Fig. 3.2.6	Location Map for Facilities in North Harbor
	Fig. 3.2.7	Location Map for Facilities in MICT
	Fig. 3.2.8	Existing Port Facilities along Pasig River
	Fig. 3.2.9	Major Traffic System in Metro Manila
	Fig. 3.2.10	Road Network in the Vicinity of Manila Port
	Fig. 3.3.1	Damage Map of Piers
	Fig. 3.4.1	Surveyed Section of Pier 8122
	Fig. 3.4.2	Surveyed Section of Pier 16
	Fig. 3.4.3	Historical Stages of Remedial Measures
	Fig. 3.4.4	Underwater Survey of Concrete Sheet Piles

	in North Harbor
Fig. 3.4.5	Distribution of Gap Width in North Harbor Piers 8-16127
Fig. 3.4.6	Proposed Structural Improvement for Pier 16
Fig. 3.4.7	Proposed Renovation Works for Sheet Pile Gaps
Fig. 3.4.8	Proposed Section for Piers 8-14
	(Projected Depth is MLLW -8.0N)133
Fig. 3.4.9	Proposed Section for Pier 16
	(Projected Depth is MLLW -8.0M)134
Fig. 4.1.1	Volume of Cargo Handled at the Port of Manila138
Fig. 4.2.1	Number of Oceangoing Ships Arraiving at the Port
	of Manila
Fig. 4.2.2	Distribution of Vessels Calling at South Harbor
	by Vessle Size145
Fig. 4.2.3	Monthly Ship Calls at South Harbor by Ship Type147
Fig. 4.2.4	Monthly Fluctuation of Average Mooring Time in 1985149
Fig. 4.3.1	Histrical Trend of Foreign Trade Cargo Volume Handled
	at the Port of Manila153
ig. 4.3.2	Percentage of Cargo Volume Handled at Each Pier/Zone
۰	in South Harbor by Packing Type157
<sup>2</sup> ig. 4.3.3(1)	Volume of Containerized Cargo in Foreign Trade
	at Manila Port
Fig. 4.3.3(2)	Containerization Ratio for Foreign Trade
ig. 4.4.1	Utilization of Mooring Facilities
ig. 4.4.2	Utilization of Piers at South Harbor (June - Dec. 1985)167
'ig. 4.4.3	Actual Utilization of Existing Facilities
'ig. 5.1.1	Port Performance of Major Ports and National Average
а. С	(1982-83)
'ig. 6.3.1	Per Capita consumption of Corn for Food Use
ig. 6.3.2	Ratio of Feed Corn Use to the Feed Requirements
	of Poultry and Hogs
ig. 6.3.3	Correlation Between Import Value of Machinery and GDP228
ig. 6.3.4	Relation Between the Quantity Indicator and GDP
ig. 7.4.1	Location Plan of Grain Terminal
'ig. 7.4.2	Barge Pool Plan
ig. 7.6.1	Alternative Plan-1
ig. 7.6.2	Alternative Plan-2
'ig. 7.6.3	Alternative Plan-3
ig. 7.6.4	Alternative Plan-4
ig. 7.6.5	Coding of the Mooring Facilities

Fig. 7.6.6 Fig. 7.8.1 Fig. 7.8.2 Fig. 7.8.3	Flow Chart of Berthing Existing Port Zone Present Land Use Land Use Plan in 2005	317 321
Fig. 7.9.1 Fig. 7.9.2 Fig. 7.10.1 Fig. 8.4.1 Fig. 9.3.1 Fig. 9.3.2 Fig. 9.3.3 Fig.11.1.1	Short-Term Rehabilitation Plan Proposed Section for Pier 9 Proposed Section for Pier 13/15 (Alternative 3) Proposed Section for Pier 13 (Alternative 4) Process of the Economic Analysis	329 342 351 357 358 359 386
Fig.12.2.1 Fig.12.4.1	Flow Chart of the Financial Analysis Sensitivity Analysis	

## SUMMARY

u National Estate

#### Chapter 1 INTRODUCTION

#### 1.1 Background

The Port of Manila is the most important port in the nation, and plays a major role in the national economic development.

At present, the Government of the Philippines is steadily developing the Manila International Container Terminal in accordance with the master plan drawn up in 1978. At Manila Port, cargoes are also handled at the piers located in the South Harbor and the North Harbor.

These piers were constructed after World War II. The facilities have become deteriorated, and cargo handling activities at the South Harbor are being hindered by the outdated facilities.

Moreover, there are many related problems such as the lack of public areas and warehouses.

So, the Government of the Philippines has requested the Government of Japan to provide technical and economic cooperation in planning the rehabilitation of the South Harbor piers.

#### 1.2 Objectives of the Study

( The objectives of the study are to formulate a Master Plan for the development of the South Harbor of Manila Port for the period up to the year 2005 and to prepare a Short-term Rehabilitation Plan for this harbor including a feasibility study within the framework of the Master Plan.

The target year for the Short-term Rehabilitation Plan is the year 1995.

(Chapter 2 is omitted.)

Chapter 3 PRESENT SITUATION OF THE PORT

3.1 Geographic Features and Natural Conditions

The Port of Manila is situated at the east end of the Bay of Manila and the mouth of the Pasig River. The Bay of Manila is surrounded with low mountain ranges, which protect the Port of Manila from strong winds. Wave heights are usually not so high within the Harbor area and the Harbor is very quiet.

The Port is situated at the estuary of the Pasig River and therefore, siltation is unavoidable.

In the vicinity of Manila, many earthquakes have been experienced. Therefore, the seismic load factor shall be taken into consideration for structural design.

3.2 Structural Survey

Table 3.2. is the overall assessment of the structural soundness/reliability of the individual piers based on the various investigations and inspections (refer to the "Main Report" Fig. 3.1 of Chapter 3).

### Table 3.2 Overall Evaluation of the Piers

Pier	Evaluation
3	Aged but still usable with some partial minor repair works to slabs/beams and fenders.
5	The most sound pier, but full repair of fenders and minimum repair works to slabs/beams required.
9	Aged but still usable with some partial minor repair works to slabs/beams and fenders.
13	Most deteriorated pier, very dangerous and in almost critical condition for normal cargo handling operation without overall repair works to superstructure including fenders.
15	Second most deteriorated pier, but still usable with some repair works to slabs/beams and fenders.

The following are the results of the survey/inspection of the existing buildings.

- 1. The two transit sheds of Pier 5 are structurally damaged, but others are good and still usable.
- 2. With regard to warehouses and buildings, the following are structurally damaged.

Warehouse ..... Block 141 (WH-2)

Block 166

# Bulidings ..... Block 155 (MPWH's Equipment Service) Machine Shop (in Container Yard-01)

3. Most of the warehouses and buildings near the engineering island basin are considerably damaged.

Most of the roads in the port zone are paved and no major rehabilitaion/renovation work will be required for the time being, though some parts of the pavement are partially uneven with cracks.

The drainage system does not necessary work effectively and shallow rainwater pools are observed here and there after rainfall.

#### North Harbor

The result of the underwater survey tells that very few sheet piles are damaged and they have no structural defects (refer to the "Main Report" Fig. 3.3 of Chpater 3). Some gaps between the sheet piles were observed but the total number of the gaps is very small while the total length of each of the Pies is quite long along their perimeters.

The backfilling behind the sheet piles is filled with firm and dense soil material and no leakage of the backfilling is expected through the gaps.

The trial excavation inspection shows that the tie-rods at Peir 8 are with partially corroded and the tie-beams at Pier 16 are broken and have no structural reliability (refer to the "Main Report" Fig. 3.4 and 3.5 of Chapter 3).

The Team studied the stability of the Piers based on the results of the trial excavation inspection and the geological investigation.

The conclusions of the structural study are as follows.

(1) No heavy load should be placed within 5 m from the end of piers.

(2) No deepending of water depth should be allowed without additional structural reinforcement works.

- 6 m below NLLW for Piers 8 through 14

- 5 m below MLLW for Pier 16

Pier 16 needs to be repaved. Because Pier 16 has a bad surface condition which is supposed to have been brought about by local settlement caused by heavy wheel loads, there is rutting and constant flow of backfilling material by rain water.

No further selltement of the backfilling of P16 is expected. The

(3)

following are the reasons for this:

- (a) no leakage of the backfilling was observed during the underwater survey
- (b) no partial settlement was perceived in the backfilling around the end of the relieving platform (if the backfilling went out through the gaps between the sheet piles, partial settlement would be induced in the backfilling.....)
- (c) the settlement due to consolidation is finished.

Chpater 4 PRESENT SHIPPING AND CARGO THROUGHPUT

4.1 Ship Types and Characteristics

The number of oceangoing ships which called at the Port of Manila in 1985 is estimated by type of ship as follows:

Container Ships88243.0Conventional Gen. Cargo Ships45922.4Tankers22010.7Bulk Carriers2029.8Semi Container Ships854.1Others20510.0		No. of Ships Calling Per	centage
Tankers22010.7Bulk Carriers2029.8Semi Container Ships854.1	Container Ships	882	43.0
Bulk Carriers2029.8Semi Container Ships854.1	Conventional Gen. Cargo Ships	459	22.4
Semi Container Ships 85	Tankers	220	10.7
	Bulk Carriers	202	9.8
Others 205 10.0	Semi Container Ships	85	
	Others	<b>205</b>	10.0

About 60% of the container ships are berthed at South Harbor and the rest moored at MICT. On the other hand, tankers, other ships and bulk carriers are generally moored at Anchorage.

The average ship size and the average loading/unloading volume per ship by type of ship are shown in Table 4.1

The predominant size of conventional general cargo ships calling at South Harbor is in the range of 5,000 - 10,000 DWT. As for container vessels, about 60% of them are below the 10,000 DWT class; however, 17,500 - 20,000 DWT class ships account for 20% of the container ships. Most of the container ships that call at the Port of Manila are feeder vessels connecting with line haul vessels at Hong Kong and Taiwan.

Ship Type	Average DWT	Avg. Loading/ Unloading Volume per ship (tons)
Conventional Ships	9,951	3,145
Semi-container Ships	10,678	1,761
Container Ships	12,022	1,905
Bulk Carriers	17,575	6,298
Tankers	9,554	1,210

## Table 4.1 Characteristics of Oceangoing Ships which called at Manila in 1985 by Ship Type

4.2 Cargo Movement

4.2.1 General

The Port of Minala, the major commercial port in the Philippines, handled about 11.4 million tons of cargo including 4,406 million tons of foreign trade in 1985.

With regards to forcign trade, the Port of Manila handles about eighty percent (80%) of all the import cargo and fifty percent (50%) of all the export cargo passing through Philippine government commercial ports. Thus, the hinterland of the Port of Manila is not limited to Metro Manila and its vicinity, but actually covers the entire nation.

The percentage of foreign trade cargo handled at the berths of South Harbor has been decreasing along with the increase at M.I.C.T. due to the advance of containerization. On the other hand, the percentage of foreign cargo handled at Anchorage has remained constant at over 30%. The major cargoes handled at Anchorage are bulk and homogeneous cargoes.

4.2.2 Foreign Trade Cargo by Commodity by Packing Type

As for imports, grains and chemicals including fertilizer are the most important commodities, while food products, timber and coconut products are the leading exports in 1985.

Loose cargo was mainly handled at Anchorage, Pier 9 and Pier 5. Other cereals (mainly rice) and bagged fertilizer were the main "loose" cargoes handled. About 33% of the imports were bulk cargo. However, the export

(5)

volume of bulk cargo was small. About 85% of all bulk cargo was handled at Anchorage.

The percentages of containerized cargo to the total general cargo are 56.0% for imports and 84.5% for exports in 1985. Around 43% of the total containerized cargoes are handled at MICT in 1985. 57% of the containerized cargo handled at South Harbor, mainly at Pier 3 and Pier 13.

## 4.3 Utilization of Port Facilities

The average berth occupancy rate of the whole South Harbor was 22% in 1985, and the average tonnage handled per meter run per year was estimated at 504 t/m. These values were relatively low compared with the figures for North Harbor.

Berths No. 3-3, 9-1, 13-1 and 15-2 are relatively well-used. However, the highest berth occupancy ratio is only 45.6%.

The berth occupancy of berths No. 5-4, 5-5, 13-6 and 13-7 are lower due to poor physical conditions such as the narrow apron width and the poor fender system, and also due to the existing operational conditions of the transit sheds behind the quaywall.

There are some sorting and storage facilities with a low utilization rate in the South Harbor area. Sheds C, K and L were not used at all in 1985 due to a lack of cargo to be stored and to their dilapidated condition.

Chpater 5 PORT MANAGEMENT

#### 5.1 Existing Port Operations

The Port of Manila is operated under "common-use" policy. Therefore, there are no public port facilities for the exclusive use of any port user, but rather all the port facilities are assigned on a first-come first-served basis. However, berthing priority is granted to certain vessels having special arrangements with PPA. The following guodeline is used at present for berthing allotment at South Harbor:

① Container handling ships are berthed at Piers 3 and 13.

② Break bulk handling ships are berthed at Piers 5 and 9.

③ Passenger ships and foreign government vessels on official business are berthed at Pier 15.

(6)

The official working holidays of the Port are only two days a year, Good Friday and Christmas.

Cargo handling in South Harbor is carried out in two shifts: the day shift (from 7 a.m. to 7 p.m.) and the night shift (from 7 p.m. to 7 a.m).

The existing stevedoring work is ordinarily conducted using ship gear in South Harbor except for container handling at Pier 3 where a "tango" crane is used for loading and unloading.

#### 5.2 Cargo Handling Productivity

The cargo handling work except container handling is executed by two different types of companies at South Harbor, stevedoring firms on board and arrastre firms at quay side. Sometimes the working speed of the two are differnt, so the overall productivity declines. Moreover, insufficient coordination among the firms related to the handling and tranport of cargoes causes a lot of lost time.

The percentage of standby/lost time to the total working time for bulk handling at Anchorage is estimated at 40%. One of the major causes is the delays caused by barges.

Chpater 6 DEMAND FORECAST

6.1 General Port Development Policy and Basic Assumptions

Considering the basic direction of national and regional development policy, basic assumptions concerning the roles and functions of the Port of Manila are set as follows:

- ① To reduce the burden of excessive concentration of traffic in MMA and to achieve more effective and economic transportation, certain cargoes such as iron and steel products and fertilizer will be imported via the Port of Batangas considering the spatial distribution of related industries.
- ② The basic functions and roles of the Port of Manila are the same as those specified in the Master Plan Study conduted by the Salzgittar Consult GMBH except for the above-mentioned relationship with the Port of Batangas.
- ③ Reflecting the status of MMA as the center of the Philippine economy, the Port of Manila will continue to play a central role as the main

gateway for imported goods.

(1) The export commodities handled at the Port of Manila will not change remarkably during the planning period.

6,2 Cargo Traffic Forecasts

Two methods are used to forecast the cargo volume to be handled at the Port of Manila. One is a macro forecast which is a method to estimate the total cargo volume as a whole. The other is a micro forecast, which is a method to estimate the cargo volume of each commodity group individually.

Herein, the future cargo volumes to be handled at the Port of Manila for the target years are assumed equal to those forecast in the medium case of the forecast by commodity group, that is the micro forecast.

		(th	ousand tons)
	(year)	1995	2005
	Commodity		
· · ·	Dairy Products	156	264
	Wheat	647	1,040
	Other Cereals	151	267
Imports	Feed	514	956
	Paper and Pulp	253	353
	Fertilizer	410	460
	Chemicals	958	1,561
	Iron & Steel	290	320
-	Machinery & Transport Equip.	437	764
a na a	Others	1,192	1,914
Sub to	tal	5,008	7,899
	Fish & Fish Products	61	131
	Feed	66	85
Exports	Other Food	317	483
	Forest Products	106	78
	Coconut Oil	80	80
	Other Coconut Products	85	85
	Others	885	1,600
Sub to	tal	1,600	2,542
Grand	total	6,608	10,441

Summary of Foreign Trade Cargo Forecast

Using the estimated percentages of each packing type by major commodity and the growth of containerization, the future cargo volume by packing type is estimated.

Chapter 7 REVISED MASTER PLAN

7.1 Fundamentals of the Master plan

Based on the role of South Harbor and the countermeasures to solve the major problems, the following basic strategies for the Master Plan, with a target year of 2005 are as follows.

In order to secure efficient port operations, South Harbor will continue to be used for the exclusive handling of foreign trade cargo except for some containerized cargoes which will be handled at M.I.C.T.

1) Effective Cargo handling

2) Rehabilitation of old port facilities

3) Container cargo handling at South Harbor

4) Preferential berthing

5) Safety

Based on these concepts, the future foreign trade cargo volume of South Harbor is forecasted as shown in Table 7.1.

· · · ·								1 . j (	1,000	tons)
Year	L	oose	Cont	ainer	ĺ	Bulk	Li	lquid	То	tal
Area	Imp	Ехр	Imp	Exp	Imp	Exp	Imp	Exp	Imp	Exp
1985		1								
S.H. Pier	530	138	669	447	214	7	22	5	1435	597
Anchorage	408	1	1	3	891	45	. 86	87	1386	136
MICT	3	2	526	321	, Fi	-	. –		529	323
Total	941	141	1196	771	1105	52	108	92	3350	1056
1995										
S.H. Pier	541	223	343	189	296	34	 -	-	1180	446
Anch.	220	-	-	-	1404		262	80	1886	80
MICT	-	-	1942	1074	-	-	-	-	1942	1074
Total	761	223	2285	1263	1700	34	262	80	5008	1600
2005				· · · · · · · · · · · · · · · · · · ·						
S.H. Pier	701	364	510	268	477	34	-		1688	666
Anch.	102		-	-	677	-	425	80	1204	08 <sup>-</sup>
Grain Terminal	-				1597		-	-	1597	-
MICT	-		3410	1796		. –		-	3410	1796
Total	803	364	3920	2064	2751	34	425	80	7899	2542

Table 7.1 Estimated Foreign Trade Cargo Volume by Packing Type by Area

7.2 Overall Evalution of Existing Facilities at South Harbor

(1) The repair of the slab at the end of pier 3 and at the back up area of berth No. 4 ar absolutely necessary.

(2) Pier 5 is in the best condition structurally of all the pier but the open storaage area at the pier is insufficient. Sheds K and L are in very poor condition.

### 7.3 Evaluation of the Alternative Plans

The alternative plans are evaluated based on the following criteria.

		Evalu	ation	
Item	Plan 1	Plan 2	Plan 3	Plan 4
	-			
Land Use	0		<b>O</b> 2 <sup>1</sup>	0
Operation of the facilities	0	0	Ø	O
Total Construction Cost	© 1	O	Δ	
Investment Timing		O O		
Adaptability to Changing Conditions Potential for Future Development			Ø	0
Future Development		0	0	0
Overall Evaluation	Ø	0	Δ	

#### Table 7.3 Evaluation of the Alternative Plans

Key ( Excellent

O Ordinary

 $\Delta$  Some problems

In order to confirm the most appropriate plan, simulation tests are executed. Judging from the results of the simulation test. Plan 1 is selected as the most appropriate plan (refer to the "Main Report" Fig. 7.1 of Chapter 7).

7.4 Land Use Plan

The land use plan is designed to promote effective cargo movement and increased port related business activities. The main direction of the plan is outlined below.

- 1) The location of Government related building like B.O.C., M.P.W.H., P.P.A. will not change in the future.
- 2) The port related urban business area where the bank and the electronic power Co., Ltd. are located along Bonifacio drive will remain basically unchanged in the future.

3) A parking are for cargo vehicles and for vehicles with business inside

(11)

the port should be prepared.

4) Increase and rearrangement of storage facilities should be considered.

- 5) The main access roads to the piers are 25th st., 16th st. and 13th st., and the main lateral roads are San Francisco st., Chicago st. and Rail road st.
- 6) It might be preferable to reserve the area which is now sequestered by the Goernment for future development (refer to the "Main Report" Fig. 7.5 of Chapter 7 for the land use plan in 2005).

Chapter 8 THE SHORT-TERM REHABILITATION PLAN

The major short-term for the development of the Port of Manila by 1995 include rehabilitation of dilapidated facilities and improvement operations.

The major items of the Short-term Plan are as follows:

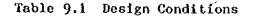
- (1) To repair the damaged portions of existing facilities to maintain the existing capcity.
- ② To improve wharf facilities to raise the cargo handling productivity and improve the overall cargo flow at the piers. These works include the widening of aprons and the enlargement of open storage areas at the piers.
- ③ To improve the cargo handling productivity at anchorage, especially through the introduction of floating pneumatic unloaders and the reallocation of some cargoes to perside handling. Based on these goals and the results of engineering inspections, the Short-term Rehabilitation Plan is proposed as shown in Fig. 8.1 of the "Main Report" Chapter 8.

Chapter 9 DESIGN, COST ESTIMATION AND CONSTRUCTION SCHEDULE

Design conditions for the rehabilitation plan are shown in Table 9.1. Soil conditions applied to the structural design are shown in Table 9.2.

Proposed structures for each Alternative plan were designed using these conditions as shown in Figs. 9.1.

Construction schedule and rough cost estimation are shown in Table 9.3 through 9.5.



	ы — К.		Level
- 1	۱.	10 J J L	f
· •	r .	1108	Lever

	and the second
м.н.н.w	
M.H.W	M.L.L.W + 0.838m
M.S.L	M.L.L.W + 0.462m
M.L.W	M.L.L.W + 0.101m
(M.L.L.W means Mean	Lower Low Water)

2) Seismic Coefficient

- for new structures ... Kh = 0.15
- for existing ..... Earthquake-proof improvement
  - structures will not be conducted.

3) Maximum Berthing Ship Size for Structural Design

Type of Ship	Dead Weight Tonnage(tf)	Length Overall (m)	Molded Breadth (m)	Full Draft (m)
Ceneral Cargo Ship	25,000	184	24.9	10.6
Container Vessel	25,000	220	28.2	10.5

4) Berthing Velocity

v = 0.10 m/sec

5) Water Depth of the Berth

D = 10.5 m (M.L.L.W - 10.5 m)

6) Crown Height of the Quay Wall

H = M.L.L.W + 4.0 (approximately)

7) Surcharge Load on the Wharves

Distributed load

Ordinary ..... 2.0 tf/m<sup>2</sup>

Extraordinary ..... 0.5 tf/m<sup>2</sup>

Wheel load

Trailer for a 40 ft container

provide a specific de la seconda de la s

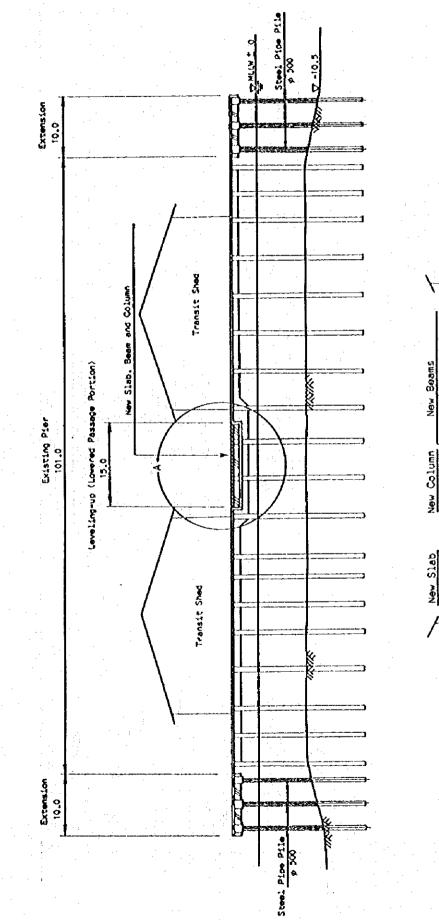
\*1 Based on the National Structural Code of the Philippines, Vol. 1 (Third edition 1986). See Appendix 9.2.1.

\*2 The maximum size of vessels/ships which can enter South Harbor during the high water period.

Depth below Sea Bottom Level (m)	Symbol	Soil Characteristics	N-value/qu(Unconfined (SPT) compressive Strength;kgf/cm <sup>2</sup> )	Unit Weight (tf/m <sup>3</sup> )
0 to 20	Ac	Silty Clay	qu=0.05 qu=0.05 + 0.042x(z-4) (z; depth in metor)	1.45
20 to 30	As	Fine Sand	N = 10	1.80
30 to 40	Dg	Sandy Gravel Gravelly Sand	N = 30	1.80
40 over	Tsc	Tuff Sand Mud Stone	N = 50	1.80

Table 9.2 Design Soil Conditions

(14)



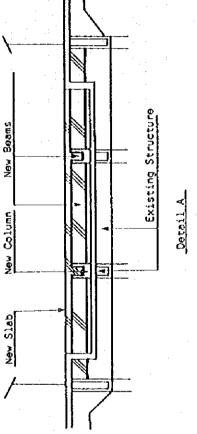


Fig. 9.1 Proposed Section for Pier 9

(15)

Table 9.3 Construction Schedule (Short-Term Rehabilitation Plan)

1990 1991 1992 1993 1994 1995 Remarks					Including soil boring and surveying	)									Including repair of slab/beam			Including repair of slab/beam						Including repair of slab/beam							100,000 m3/year	210,000 m3/year	400,000 m3/year	-
1760 TYOY TY	:						· · ·	1:				· · · · · · · · · · · · · · · · · · ·	1	1			<u> </u>		<b>)</b>		1		-											
1987			1						•																							· · · ·		
Item 1986	Feasibility Study (byJICA)	Ammed-rel of Baseihilttv Studv	and Loan Prepartion/Procurement	Envineering Service	Detailed Engineering	Construction Supervision	4 Actural Construction Work	MODILLEATION Damodi 1 feation	Pier 3	Repair of Slab and Beam	Fixing of Fender	Pier 5	Fixing of Fender	Demolition of Transit Shed	Leveling-up of Lowered Passage	Pier 9	Fixing of Fender	Leveling-up of Lowered rassage Derive Works of Dear O	Pier 13 and notes of the 7	. 6.4	6	Pier 15	Fixing of Fender	Leveling-up of Lowered Passage	Demolition of Transit Shed	Back-up Area	Pavement (CY-01)	Demolition and Reconstruction	(Block 141)	(9) Dredging	SLIDS/Flers	Anchorage	Main Tenance Drecking	

Table 9.4 Tentative Construction Schedule (Master Plan) (1986 - 2005)

Including soil boring and surveying Including repair of slab/beam Including repair of slab/beam Including repair of slab/beam Remarks Loan negotiation 400,000 m<sup>3</sup>/year Off the MICT 2986[ 2987] 2988 2989 2990 2990 2991 2992 2093 2994 2995 2095 2996 2997 2998 2000 2001 2002 2003 2004 2005 Pavement (CY-O1) Pavement (CY-O1) Pemolition and Reconstruction (Block 141) Pemolition of Block 147, 150 and 155 Fixing of Fender Leveling-up of Lowered Passage Extension Works of Pier 9 Pier 15 Fixing of Fender Leveling-up of Lowered Passage Demolition of Transit Shed leveling-up of lowered Passage Plar 5 Fixing of Fender Demolation of Transit Shed Leveling-up of Lowered Passage 2 Appraisal of Peastbility Study and Loan Prepartion/Procurement 3 Engineering Service (1) Detailed Engineering (2) Construction Supervision Repair of Slab and Beam Fixing of Fender, Repair of Slab and Beam Fixing of Fender I Feastbility Study (byIICA) Maintenance Dredging Crain Terminal Site Preparation Equipment/Mechanical Floating Unloader 4 Actural Construction Work (1) Mobilization (2) Demobilization (3) Pier 3 Dredging Slips/Piers Back-up-Area Anchorage Lten E PLAT 13 Pier 9 Ē £ <u>છ</u> (10) 3 3 6

Converted into fixed type unloader

:::

(17)

# Table 9.5 Rough construction cost Estimate (Short-Term Development Plan) (1988 - 1994)

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•

ſ	1	I	Γ	Cost	· · · · · · · · ·	1
Work Items	Unit	Quantity	Local	Foreign	[	Remarks
HOLK LECHO		Quanto 100	Portion	Portion	Total	newarko
1.Pier 3						·
Slab and Beam	<sub>в</sub> 3	354	2,150	1,570	3,720	
Slab	່ <u>ຫ</u> 3	680	2,803	2,047	4.850	
Fender (V-500)	p'ce	18	1,819	5,401	1	
1.1		· ·			7,220	
Fender (V-300)	p'ce B	19	1,287	3,823	5,110	
Leviling-up (Center) Sub-total	10	2,700	9 050	1 10 0.01		Constructed in 2004
<u></u>			8,059	12,841	20,900	
2. <u>Pier 5</u>		24				
Fender (V-500)	p'ce	36	3,641	10,809	14,450	
Fender (V-300)	p'ce 3	6	405	1,205	1,610	
Leveling-up (Center)		5,250	30,422	17,488	47,910	, and a second
Domolition of	block	2	6,920	1,080	8,000	2,930m <sup>2</sup> x2
Transit Shed	- 10 A.					
Sub-total			41,388	30,582	71,970	
3. Pier 9						
Fender (V-500)	p'ce	18	1,819	5,401	7,220	
Fender (V-300)	p će	6	405	1,205	1,610	
Leveling-up (Center)	" <sup>3</sup>	3,850	22,307	12,823	35,130	
Extension Works	m:	380	24,987	42,183	67,170	
Sub-total			49,518	61,612	111,130	
4. Pire 13						
Slab and Beam	m <sup>3</sup>	345	2,098	1,532	3,630	
Fender (V-500)	p'ce	38	3,843	11,407	15,250	
Fender (V-300)	p'ce	5	337	1,003	1,340	
Sub-total			6,278	13,942	20,220	
5.Pier 15						
Slab and Bean	3	620	3,768	2,752	6,520	
Fender (V-500)	p'ce	36	3,641	10,809	14,450	
Fender (V-300)	p'ce	6	405	1,205	1.610	
Leveling-up (Center)		4,530	26,250	15,090	41,340	
Demolition of	block	1	3,468	542	4,010	2,900m <sup>2</sup>
Transit Shed	· · · ·	a di p				
Sub-total			37,532	30,398	67,930	
6.Back-up Area						·
Pavement (CY-01)	2	55,000	16,186	21,634	37,820	
Demolition and		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	101100		311050	
Reconstruction	block	1	22,728	6,152	28,880	3,500m <sup>2</sup>
(Block-141)		*	c*)[LV	0,176	C01000	<b>313</b> 00m
Demolition (Block						
147, 150 and 155)	blask					
	010CX	3	30			Demolished in 2000
Sub-total			38,914	27,786	66,700	

(in 1,000 Pesos, \$1=P20.5=¥154)

(18)

# Rough construction cost Estimate (Short-Term Development Plan) (1988 - 1994)

(in 1,000 Pesos, \$1=P20.5=¥154)

				Cost		
Nork Items	Unit	Quantity	Local	Foreign		Remarks
		· · · ·	Portion	Portion	Total	
7.Dredging						
Slips/Piers	3 ه	400,000	2,200	17,800	20,000	
Anchorage	"3	620,000	3,410	27,590	31,000	
Sub-total			5,610	45,390	51,000	
8.Grain Terminal						
Floating Unloader	set	2		(220,000)	(220,000)	Introduced in 1994
Site Preparation	L.S.	· 1				Constructed in 2000
						through 2002
Civil Work and	L.S.	1				Construction in 2003
Equipment/Mechanica)						and 2004
9.Engineering Fee		·				
Detail Engineering			4,927	27,923	32,850	Except Item 8
IO.Total A	· · · · ·		192,226	250,474	442,700	ltems 1 - 7,9
11.Contingency A			19,222	25,078	44,300	10% of Item 10
12.Grand Total A			211,448	275,552	487,000	in 1,000 Pesos
			(431)	(575)		

N.B. In case of introduction of Floating Pneumatic Unloader, the following cost shall be added to the above Grand Total A

13.Floating Unloader		-	220,000	220,000	Refer to Item 9
Engineering Fee		-	18,000	18,000	
Total B		-	238,000	238,000	
14.Grand Total		211,448	513,552	725,000	Grand Toatl A+Total B
		(29\$)	(715)		

Note: 1. Above cost estimate is based on the survey as of Aug.'86 2. The following costs/fees are not included (Refer to App. 9.6.2)

1) repair/improvement cost for West and South Breakwaters

repart/ Amprovedent cost for west and south breakwaters
maintenance dredging cost (400,000m<sup>3</sup>/year)
price escalation from Aug.'86 through Jun. '87
withholding and contractor's taxes (55 of the total contract ammount)

5) supervising fee

6) repair/improvement of navigation aids

3. Dredging areas are shown in App. 9.6.3.

#### Chapter 10 ADMINISTRATRION AND OPERATIONS

#### 10.1 Administrative Recommendations

Based on the analyses of the present situation of the port, the following items are recommended for improvement of the port administration.

1) Basic structure and responsibility for the port administration

2) Appropriate coordination of port services

3) Improvement of human resources

4) Improvement of port statistics

5) Simplification of formalities and administrative procedures

6) Improvement of maintenance work

10.2 Proposed Operation System

Based on the analyses of the present operational problems, the following basic maesures are proposed to improve the efficiency of the cargo handling opearations and the traffic flow:

- ① Some of the cargoes which are presently handled at anchorage should be transferred to pier side handling.
- ② A preferential berthing system is being adopted for berth allotoment at the Port of Manila.
- ③ The improvement of cargo handling machines and the rearrangement of physical facilities at the wharf are proposed to raise the efficiency of cargo handling.

To achieve significantly raising cargo hanling efficiency for grain, the introduction of floating unloaders at anchorage is recommended in the Short-term. Considering the average discharging volume of grain per ship, two floating pneumatic unloaders with a capacity of 400t/hrs each should be provided.

#### Chapter 11 Economic Analysis

The Short-term Rehabilitation Plan is evaluated using the Internal Rate of returan (IRR) which is calculated based on cost-benefit analysis from the viewpoint of the national economy. Banefits considered are the savings in ships' staying costs, cargo handling costs and time costs, while costs are the construction and maintenance costs. the internal rate of return, using 30 years as the period of economic calculation, is 18.61%.

#### Chapter 12 Financial Analysis

PPA maintains its financial viability throughout the entire project life including the construction period. It will be able to pay all expenditures and have some surplus even after appropriating funds for the repayment of foreign loans including interest.

As for the profitability of the project itself, the FIRR is estimated to be 7.69% for the base case, which exceeds the weighted average cost of capital (3.1%).

Judging from the above, we conclude that the Short-term Rehabilitation Plan with the target year of 1995 is feasible both economically and financially.

# CHAPTER 1 INTRODUCTION

#### CHAPTER 1 INTRODUCTION

#### 1.1 Background

The Republic of the Philippines has established a long-term economic development plan (1978-1987). The main thrust of the economic policy has been shifted to promoting export-oriented industry.

The Government is now implementing a modified national development plan (1984-1987) in accordance with the basic policy. Although the Government is trying to promote exports, along with the increase of domestic demand imports have been increasing resulting in a worsening international balance of payments.

The Republic of the Philippines is an island nation with 870 ports. Thus, the development and operation of these ports and of maritime transportation as a whole comprise the most important facet of the national transportation infrastructure.

The port of Manila is the most important port in the nation, and plays a major role in the national economic development.

At present, the Government is steadily developing the Manila International Container Terminal in accordance with the master plan drawn up in 1978. At Manila, cargoes are also handled at the piers located at South Harbor and North Harbor.

These piers were constructed after World War II. The facilities have become superannuated, and cargo handling activities at South Harbor are being hindered by the outdated facilities.

Moreover, there are many related problems such as the lack of public areas and warehouses.

So, the Government of the Philippines has requested the Government of Japan to provide technical and economic cooperation in planning the rehabilitation of the South Harbor piers.

1.2 Objectives of the Study

The objectives of the study are to formulate a Master Plan for the development of the South Harbor of Manila Port for the period up to the year 2005 and to prepare a Short-term Rehabilitation Plan for this harbor including a feasibility study within the framework of the Master Plan.

The target year for the Short-term Rehabilitation Plan is the year 1995.

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#### 1.3 Circumstances

The Government of the Republic of the Philippines requested the Government of Japan to carry out a feasibility study on the MANILA SOUTH PORT REHABILITATION PROJECT.

In response to the request, the Government of Japan decided to undertake the study and dispatched the Japanese Preliminary Study Team headed by Mr. Koji Kobune, JICA to the Philippines from November 27 to December 7, 1985. The team had a series of discussions about the project with the Philippine Ports Authority. The Scope of Work for the study was agreed upon on 3 December 1985 by Mr. Koji Kobune, leader of the Japanese Preliminary Study Team, and Mr. Maximo S. Dumlao, JR., Officer-In-Charge, Philippine Ports Authority.

Based on the Scope of Work, JICA organized a study team headed by Mr. Terumi lijima, Executive Director, OCDI. The study team executed the study, including two field surveys, from April of 1986 to May of 1987.

1.4 Scope of the Study

In order to achieve the objectives, the Study covers the following items.

1. Field Survey

a. Natural Conditions

- a review of existing data on the following items .
  - o soil
  - o climate
  - o topography
  - o hydrography
  - o hydrology
  - o siltation
- additional investigations as follows:
  - o soil investigation
  - o topographic survey
  - o wave hindcasting (as necessary)
- b. Present situation of cargo flow within the area of Manila Port
- c. Inspection and functional evaluation of existing pier structures

-2

- 2. Review of Master Plan
  - a. a review of completed and on-going studies and plans, in particular, the Master Plan for the Port of Manila carried out in 1977-1978, in view of the following:
    - hinterland of the port
    - volume of traffic
    - functions of each section of the port
    - land-use nearby the port
    - alignment of access roads
  - b. alternative operational layout plans for South Harbour
- 3. Feasibility Study on the Rehabilitation Plan for South Harbour:
  - a. to determine the structures which require rehabilitation or demolition;
  - b. to project the traffic volume for South Harbour;
  - c. to define the detailed scope of the plan including the construction schedule;
  - d. to carry out preliminary designs and cost estimation;
  - e. to recommend management and operational systems;
  - f. to carry out economic analysis;
  - g. to carry out financial analysis.
- 1.5 Study Schedule

The study was conducted as follows.

1)	First field survey, presentation		
11	of the Inception Report	: April - May,	1986
2)	Second field survey, submission		
	of the Progress Report	: June - Sept.,	1986
3)	Preparation of the Interim Report	: Sept Nov.,	1986
4)	Presentation of the Interim Report	: Dec.,	1986
-5)	Preparation of the Draft Final Report	: Jan March,	1987
6)	Presentation of the Draft Final Report	: March,	1987
7)	Preparation of the Final Report	: April - May,	1987
8)	Submission of the Final Report	: June,	1987

## 1.6 Organization of the Study Team

The Japanese study team was comprised of ten specialists from OCDI and NIKKEN SEKKEI, and a JICA representative. Their names, duties and present positions are as follows.

	Duty	Name	Present Position
1)	Leader, Overall Study	Terumi lijima	Executive Director, OCDI
2)	Port Planning	Kunihiko Iwata	OCDI
3)	Demand Forecast,	Keiki Yasutake	<b>OCDI</b>
	Port Management, and		
	Port Operations		
4)	Financial Analysis	Kenji Hattori	OCDI
5)	Economic Analysis	Toshio Yashikawa	OCDI
6)	Natural Conditions,	Shinsuke Kubo	NIKKEN SEKKEI
	Stractural Design		
7)	Structural Design,	Yoshiyuki Kojitan	i NIKKEN SEKKEI
	Construction Planning,		
	and Cost Estimetion		et and the second second second
8)	Structural Soundness	Takaharu Ikuta	NIKKEN SEKKEI
	Investigation		and all a second and a second second
9)	Natural Conditions	Toshihiro Takahas	hi NIKKEN SEKKEI
10)	Structural Soudness	Susumu Sunami	NIKKEN SEKKEI
	Investigation, Structural		
	Design		
11)	Coordinator	Chisa Hara	JICA
		and a second	
1.7	List of PPA Counterparts		
			$\mathcal{T}_{i}$ is a set of equation of the set of $\mathcal{T}_{i}$ , where
	PPA counterparts are list	ed below.	$\left\{ \left  \mathcal{D}_{i} \right  \in \left\{ \left  $
	HEAD OFFICE		
	1. Mr. Prudencio Mercado	, Jr. Pro	ject Manager
	2. Mr. Rodolfo Aquino	Asst	t. Project Manager
		Ecor	nomic Analysis
	3. Mr. Rolando Aquino	Dema	and Forecast
	4. Mrs. Bernardita Samia	Pina	ancial Analysis
	5. Mr. Eugenio Macuha, J	r. Engi	Incering

6. Mr. Teresita de Guzman

Port Planning

7. Mr. Orlando B. Ancheta

PMU MANILA

1. Mr. Domiciano Flores

2. Mr. Maximo Quijano

3. Mr. Evelindo Escuterio

-5-

4. Mr. Renato Yumang

Statistic Work Assistance

Sectin Chief Planning and Design Section Port Operation Civil Engineering Assistant 1 Civil Engineering Assistant

# CHAPTER 2 SOCIO-ECONOMIC BACKGROUND

### CHAPTER 2 SOCIO-ECONOMIC BACKGROUND

#### 2.1 General Introduction

The total land area of the Philippines is approximately 300,000 square kilometers.

As of January 1986, there are thirteen administrative regions in the Philippines including Metropolitan Manila (See Figure 2.1.1). Metropolitan Manila has been designated the National Capital Region, and includes four cities (Manila, Pasay, Quezon and Caloocan City) and thirteen other municipalities.

Manila was proclaimed the capital of the Philippines on June 24, 1571. Manila remained so until Quezon City was made the capital on July 17, 1948. With Presidential Decree No. 940, Manila was again made the capital and the permanent seat of the national government on June 14, 1976.

2.2 Population and Employment

#### 2.2.1 Population At Present

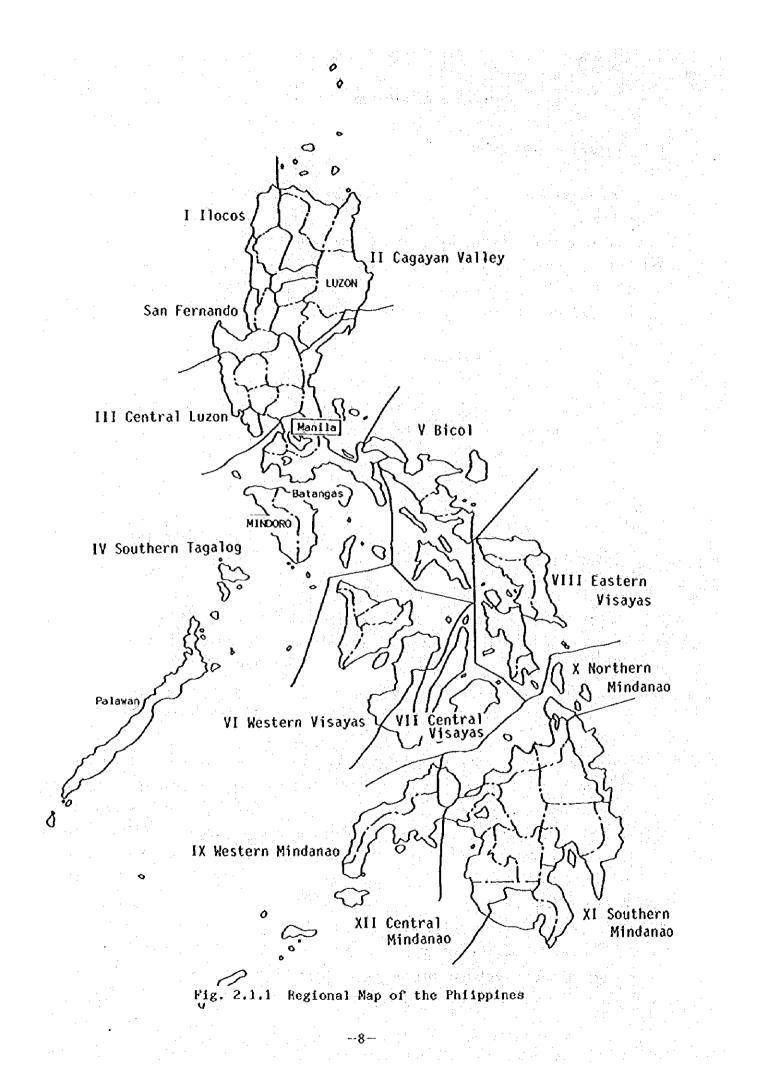
The 1980 Philippine population census placed the total population of the country at 48,098,460 as of May 1, 1980. Among the thirteen regions, the bulk of the population was concentrated in MMA and Southern Tagalog (Region IV) located south of MMA. MMA and Region IV are the most urbanized and most economically developed regions in the Philippines.

The tendency towards further concentration of population in MMA and Region IV can also be seen in the preliminary 1985 statistics (See Table 2.2.1).

High annual growth rates were recorded in the 1960's: the average annual growth rate during the decade was 3.1 percent. Due to the rapidly increasing population, the Population Commission was created in 1969 to formulate policy and program recommendations on population and socio-economic development. As a result, population growth slowed down to an annual growth rate of 2.8 percent from 1975 to 1980, and 2.6 percent from 1980 to 1985.

The annual population growth rate of MMA also slowed down from 1960 to 1985, though the population share of MMA increased during 1960-1985 due to a sustained inter-regional migration of people from Bicol and Visayas as well as from some areas in the northern part of Luzon into MMA.

-7-



by Region for Census Years Population and Crowth Rate

Table 2.2.1

/180 5. V ς γ 0 2 5.0 8.6 8 ი ო 2.4 2.4 т. С 5.0 ი ო ର ମ 2.7 1 5.7 10 00 69 .80 2.6 3. 0 ь. С с С 5 ÷., <u>с</u>. 2.7 1.7 5. 10 ¢.3 တ္ ထ œ. CROWTH RATE ŝ Ň 8 2 4.0 è C ы. С 1.70 н 8 а. В. Г ₹ 1 ب. ۲. °. ∽ 2.2 ς. Π 5.2 ന 3. 4 6.<del>7</del> 0 5 09. / 10 ц ц ŝ 3.7 ຕ ເຊ 9. -5.4 9 . . . 2.4 2.1 ы. Ч တ် က 12.7 7.1 ÷. 10.01 13.0 7.2 <u></u> б 1.7 ю С 0.7 ω 54,688 100.0 Estimate) ÷ 1985 6,942 3.903 5,456 7,089 2,073 3,718 3,836 4,195 2,598 2,521 3,922 5,092 2,863 7.4 ы С 100.0 12.3 9.<del>7</del> 10.01 7.2 -<del>1</del> ы Ч 0.2 12.7 6.7 5.7 4.7 THOUSANDS 1980 5.296 18,098 2,215 6,119 4.526 2,799 2,528 2.759 4,803 3,541 3,787 3,347 ,271 3,477 ດ່ ر ب Philippine Statistical Yearbook 1985 (NEDA) 6 t-100.0 11.8 ° 2 4. 6 12.4 7.6 ω 6 6.2 6.2 0 б. т ۍ ب 6.5 10.0 1975 z 4.970 5,214 3,194 2,314 42,071 3,269 2,715 2,070 1.933 2,048 ο 4,210 4,1,5 3,387 2,600 н ŧ⊣ ∢ ы С 6.5 100.0 10.8 4.6 <u>б</u> 8.3 ц С ц ц 6.0 . <del>г.</del> 0 <u>6.</u> 12.1 ст. С Ĺ, þ 1970 ρ. 100.0 36.684 3.697 3,615 3,618 3,033 2,991 1,691 1,869 1,953 2,201 1,941 4.457 2,967 2,381 ò ρ, † † 11.4 5.0 0 .0 6.1 0.6 9.3 L1.4 8.7 ы С 4.8 ວ ທ ម។ ហ 1960. 2,462 27,088 2,428 1,202 2,525 3.078 2,523 1,353 1,383 2,363 2,041 1,351 3,081 1,297 (National Capital Region) Metropolitan Manila Area Southern Mindanao Mindanao Nortern Mindanao Western Mindanao Tagalog Visayas Eastern Visayas Western Visayas Cagayan Valley Central Luzon Central Soutern Central I. Ilocos Bicol Philippines Region . 0 -6 4 N . m ហ្ 0 0 ω. -E 12.

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National Census Statistics Office) Philippine Yearbook 1985 (NEDA

1985

- 1980

1960

••

Source

#### 2.2.2 Future Population

According to the Philippine population projections, the Philippine population will increase to 68,424 thousand people in 1995 and 81,591 thousand people in 2005 (middle estimate), and the annual growth rate will continue to decrease gradually. The forecast annual growth rate of MMA is higher than that of the nation. This shows that the concentration of population into MMA will continue during the projection period (See Appendix 2.2.1).

-10--

Table 2.2.2 Population Projections for the Philippines by Region: 1980-2005 (Unit

										•		rerection /
	-								Annual	Crowth Rate	ę	
	ALTETAT	1980	1985	1990	1995	2000	2005	1985/1980	1990/1985	·	1995/1990 2000/1995	2005/2000
Philippines	Les	48,098	54,488	129.09	914.99	71,320	75,859	2.5	2-2	00 11	1 4	1.2
:	м.	48,098	54.668	61,480	68.424	75,224	81,591	2.6	2.4	2:2	1 9	1.6
	H.	48,098	54.762	61.894	69,447	77.209	84.971	2.6	2.5	2.3	2.1	1.9
Metropolitan	1	5.926	426.9	168.4	8.770	9 520	10,201	3.2	2.6	2.1	1 7	ः 
Manila Area	¥.	5.926	6,942	7.974	179.8	9.895	10.737	3.2	2.8	2.4	5.0	.9.1
-	н.	5,926	6,952	8,016	9.072	10.083	11,045	3.2	2.9	2.5	2.1	∞ .+
Region 1	1	3.541	3,890	4, 236	4,552	508.4	5.031	1-9		1.4	11	6-0
- <b>-</b>	w	3.541	3,903	4, 292	4,690	5,073	5, 422	2.0	6.1	60 • 1 • 1	1.6	- - 
		3,541	3.909	4.321	4.761	5,210	5,652	5 O : 2	2.0	2.0	8.1	91
Region 2	<b>,</b>	2,215	2,512	2,806	3,085	3.327	3.552	2.5	2.2	1.9	5	1.3
	W	2.215	2,521	2 8 45	3,182	3,518	3,835	2.6	2.4	2.3	2.0	7.1
	н	2,215	2,525	2,864	3.232	3,615	4,000	2.7	2.5	2.4	2.3	2.0
Region 3	L.	4,803	5, 439	6,065	6,654	7.159	7,620	2.5 2	2.2	6.4	<b>112</b>	1.3
		4,803	5.456	6.142	778*9	7.529	8,162	2.6	2.4	2.2	6.1	:91 191
	н.	4,803	5,465	6.181	27:6*9	7.718	8,481	2.6	2+5	2.3	. 2.1 .	1:9
Region 4		6'119	7,065	7,992	8,869	9,630	10.341	2.9	2.5	2.1	1.7	्राः च
	м.	6,119	7.089	8.105	9.152	10,188	11,166	3.0	2.7	5.6	2.1	6.1
	н.	6:119	7,102	8,162	9,296	10.472	11.654	0°£	5 <b>3</b> 3	2.6	2.4	2.2
Region 5	• •	3,477	3,907	4,323	012.4	5.035	5,341°	2.4	2.0		1.3	1.2
	м.	3, 477	3,922	4.388	4.720	5.035	5,341	2.4	2.0	1.7	1.3	1.2
	H	3.477	3,929 (	1 122	920 T	์ มี มี	100.9	й С.	•	· · ·	•	( ( ) (

-11-

• At 1994

										:)	(Unit: 1000 J	1000 Persons)
	Alternative	000	L 0 (		L C C		· · · · ·		-	Growth Rate		
Bari An K	-	-700 1 576	L 707	0667	G66T	2000	2005	1985/1980	1990/	2 1995/1990	2000/1995	2005/2000
		0701	22.0	000.40	240.0	0.390	6.713	2.3	2.0	1.6	1.2	- 0 - T
-	M	4,526	5,092	5,672	6,520	6, 800	7,301	2.4	2.2	2.0	1.7	
	. Н.	4,526	5,102	5,715	6,355	7,002	7,645	2.4	2.3	5	2.0	
Region 7		3.787	4,182	4,559	4,896	2°171	5,420	2.0	2.1	1		•
	W	3,787	4,195	4,616	5,037	174 S	5,811	2.1	1.9	1.8	1.6	
:	34	3.787	4,202	4,645	. 5 .109	5.578	6,041	2.1	. 2.0	1.9		• • •
Region 8	1	2.799	3,063	3,317	3.558	3.764	3 ,960	00 1	1.6	1.0		
	W	2.799	3.073	3,360	3,665	3,973	4.263	1.9	1.8	1.8	1.6	
	Н	2,799	3.078	3,383	3,720	080.4	577.7	6-1-	1.9	1.9	0	
Region 9	-1	2.582	2,853	3.150	3,424	3,658	3.875	2.0	2.0	1 2		
	M	2.582	2.863	3,195	3,53,4	3.874 [	4,195	2.1	2.2	2.0	6	
	Ĥ	2,582	2.868	3,218	3,591	3.984	4,384	2.1	2.3	2.2	~	0
Region 10		2,759	3,168	3,567	3.953	4.301	4,633	:	- 5 °4 -	2.1	1.7	5
	×	2,759	3.178	3,616	4,074	4+540	4,993	2.9	2.6	2 4	2.2	
	ż	2,759	3,184	3,640	4,135	4,661	5.203	2.9	2.7	2.6	2.4	2.2
Region 11		3,347	3.823	4,275	4,701	5.074	5.429	2.7	2.3	6.1	1.5	1.4
-	×.	3.347	3.836	4.334	4.848	5.364	5,858	2.8	2.5	2.3	2.0	8.1
		3,347	3,843	4,364	4,924	5,513	6,116	5°. 7	2.6	2.4	2.3	2.5
Region 12	· · · · · · · · · · · · · · · · · · ·	2.271	2.589	2,902	3,205	3.478	3.745	2.7	2.3	2.0	1.6	5
	W.	2,271	2.598	2,942	3.304	3.675	4,037	2.7	2.5	2.3	2.2	0.1
		2,271	2.602	2.963	3,356	3,776	4.212	2.8	2.6	2.5	2.4	6
Source: Philippine	Population Projections 1980-2030 (NEDA	ojection	15. 1980-2	OSO (NED	(Y)							
		:					•					
				····· *			•					
				•		4 1. 54	·			•		
·								•			·	-
							÷.					-
						••						

#### 2.2.3 Employment

The Philippine labor force was reported to be twenty-one million persons or 39.3 percent of the population in 1984. "Labor force" means the economically active population which comprises the population 15 years old and over who are either employed or officially unemployed during the reference quarter.

In spite of a 4.9 percent increase of the labor force, the number of employed persons increased by only 4.6 percent from 1980 to 1984. This contributed to an increase in the unemployment rate from 5.0 percent in 1980 to 6.2 percent in 1984. Though there are several major causes of unemployment in the Philippines, foremost among them is the rapid population growth, causing a regular increase in the labor force. Employment opportunities have not increased along with the growth of the population (See Table 2.2.3).

The majority of the employed persons work in the agricultural sector, though the share of this sector has gradually decreased since 1965. The employment share of the industrial sector is stable at around 15 percent. The service sector is increasing its employment share.

As for MMA, the labor force participation ratio is 38.6 percent and the unemployment ratio is 16.3 percent as of 1984. The unemployment ratio in MMA is much higher than in the Philippines as a whole. MMA cannot sufficiently absorb those people who want to work there because of the rapid increase of population (See Table 2.2.5).

-13-

Table 2.2.3	Labor Force	Participation	Rate and	Employment Status
-------------	-------------	---------------	----------	-------------------

			aley a de		(Uni	t: 1000 p	ersons)
	1971	1975	1980	1984	Annual C	rowth Rat	e (%)
					175/171	180/175	184/180
Population (A)	37,862	42,071	48,098	53,351	2.7	2.8	2.6
Labor Force (B)	13,241	15,161	17,308	20,969	3.4	2.7	4.9
Employed (C)	12,542	14,518	16,434	19,673	3.7	2.5'	4.6
Unemployed (D)	699	643	874	1,296	(2.1)	6.3	10.4
Labor Force Participation (1) (B/A)	35.0	36.0	36.0	39.3			
Unemployment Rate (\$) (D/B)	5.3	4.2	5.0	6.2		and the second	

Source: Philippine Statistical Yearbook 1985 (NEDA)

# Table 2.2.4 Employed Persons by Major Industry Group

								· · · · ·						
				÷ .							· · ·	(Unit:	Thousa	nds, %)
	19	65	19	70	19	75	19	80	19	84	An	nual Gr	owth Ra	te
		Share		Share		Share		Share		Share	170/165	75/ 70	80/ 75	84/*80
Philippines	10,101	100.0	11,358	100.0	14,517	100.0	16, 134	100.0	19,673	100.0	7.4	5.0	2.5	4.6
Agricultural Sector	5.725	56.7	6,100	53.7	7.768	53.5	8,453	51.4	9,733	49.5	1.3	5.0	1.7	3.6
Industrial Sector	1,420	14.0	1,843	16.2	2,161	14.9	2,496	15.2	2,824	14.4	5.4	3.2	2.9	2.5
Service Sector	2,956	29.3	3,415	30.1	4,588	31.6	5,485	33.4	7,116	36.1	2.9	6.1	3.6	5.3

urce: Philippine Statistical Yearbook 1985 (NEDA)

	140	10 2.2.7	mprojacne in i	ц <b>ы</b> »	
				('00	0 persons
					1984
Ρορι	ulation		(A)		6,739
Labo	or Force	· · · ·	(B)		2,599
	Employed		(C)		2,175
4.5	Unemployed		(D)		424
Labo	or Force Parl	ticipation	(%) (B/A)		38.6
Uner	nployment Rat	te (%)	(D/B)		16.3

# -44 Table 2.2.5 Employment in MMA

Source: Philippine Yearbook 1985 (NEDA)

-14-

## 2.3 National Economy

# 2.3.1 Overall Development

In the 1970's the Philippine economy (GDP) maintained steady growth averaging just over 6 percent per annum. But in 1980 this growth rate started to decline and by 1984 it had become negative because of (a) the world-wide economic recession of 1980, following the second round of oil price increases, (b) the collapse of the world markets for copra and sugar, which are among the main export products of the Philippines, and (c) the crisis of confidence and the flight of capital following the assassination of Senator Aquino in 1983.

Mainly due to item (c), investment in the Philippines drastically declined after 1983. Investment in the short-term is unlikely to bring about a full-fledged economic recovery. Investors are taking a "wait-and-see" attitude toward the stability of the new government.

So, it is presently personal consumption that supports the Philippine economy.

## 2.3.2 Sectional Distribution of Activities

The GDP in 1985 was 90,469 million pesos of which 39.3% was in the service sector, 31.9% in the industrial sector and 28.8% in the agricultural sector.

In the Philippines, agriculture still plays the pivotal role in socioeconomic development. Agriculture is the main source of livelihood of 70 percent of the population. Agriculture employs about 50 percent of the labor force and produces about half of the total export revenues. The main crops are palay (rice), corn, fruits, nuts and root crops as food crops, and coconut and sugar cane as commercial crops. The industrial sector constitutes a major part of the Philippine's total economic activitics. Major manufacturing industries are light manufacturing industries such as food, beverages, tobacco, textiles and apparel. The heavy industries, on the other hand, are paper and paper products, industrial chemicals, other chemical products, petroleum refineries and so on.

The main activities of the service sector are trade and services such as education, medicine and recreation.

After 1980 the growth rate of the industrial sector drastically declined to a negative growth from the high growth rate in the 1970's. But

Table 2.3.1 Gross Domestic Product by Expenditure at Constant 1972 Prices

												<b>-</b> .						
						_										3	Juua.	Annual Growth Rate
· · ·	1970		1975		1980		1981		1982	82	1983	5	1961		1985		18.151.	/58. /08./51.
											•				•	Γ	70 7	03. 52. 04.
Expenditure on CDP:	51,014	100 10	51,014 200.0 68.361 200.0 92,706 200.0 96,207 100.0 98,999 200.0 99,920 200.0 94,214 200.0 90,469 200.0 6.0 6.3 (0.5)	100.0	92,706	100.0	96,207	100.0	98,999	100.0	99,920	0.001	1 7 12 7 6	00.0	90, 469 1	0.0	5.0 6.	(0.5)
Personal Consumption	37.088 72.7 46.160 67.5 59.270 63.9 61.617	72.7	46.160	67.5	59.270	63.9	61,617	64.0	64.0 63.535 64.2 65.378 65.4 66.033 70.1 66.162 73.1 4.5 5.1	64.2	65.378	65.4	56,033	10.1	66,162	73.1	4.5 5	2.2
Covernment Consumption	4,228	α. 9	8.3 7.031 10.3		8,266 8.9 8.598	8.9	-	8 9	8.9 9.145 9.2 8.689 8.7 8.255 8.8 8.205	6. 1.1	8,689	8.7	8.255	8.8	8,205	9-1-9	1.7 3.	9.2 10.7 3.3 (0.1)
Lavestments	10.835	21.3	10.835 21.3 18.984 27.8 26.0	27.8	26,609	28.7	28.7 27.220	28.3	28.3 26.267 26.5 24,924 24.9 15,851 16.8 12,616 24.0 11.9 7.0 (23.9)	26-5	24,924	24.9	15.851	16.8	12,616	14.0 11	7 6.1	(11.9)
Fixed Capital Formation 7,919 15.46 15.037 22.0 22.737	616.7	3-51	15.037	22.0	22.737	2.4.5	23,542	24 5	24.5 23.542 24.5 23.687 23.9	23.9		<u>^</u>	16,541	17.5	16.541 17.5 12.714 14.1 13.7 8.6 (11.0)	14,2 23	3.7 8.	(0.11)
StockB	2,916	5.7	2,916 5.7 3.949 5.8 3.872	5.8	3,872	7.4	4.2 3.678	3.8	3.8 2,580	2.6			(690)	0.7	(690) 0.7 (98) (0.1) 6.2(0.4)(52.3)	(1.0)	5.2(0.	1)( 52.3)
Net Exports	(1.246) (2.5) (3.554) (5.2) (1.302) (1.4) (907) - (0.9) (1.837) (1.8) 1.571	(2.5)	(3.554)	(2.2)	(1,302)	(7:17)	(106)	(6.0) -	(1.837)	(8.1)	172.1		2,671	2.8	2,671 2.8 5,356 5.9	5.9	-   •	•
Statistical Discrepancy	109	0.2	109 0.2 (260) (0.4) (137) (0.1) (321) (0.3) 1.889	(0.4)	(137)	(1.0)	(321)	(6.0)	1.889	6.1		:	1.404	1.5	1,404 1.5 (1,870) (2.1)	(2.1)	• ب	

Table 2.3.2 Gross Domestic Product At Constant 1972 Prices

-16-

															ίΩ)	(Unit: Million Peros. 2)	11110	L Pepor	а, <u>5</u> )
				· · · .								 				S.	o renu	Annual Crowth Rate	Rate
	1970		1975		1980		1961		51	1982	1983	33	1984		1985	Ľ.	8. /54	/58. /08. /51.	
	·		•		•		••••••••••••••••••••••••••••••••••••••						L		Ļ	02. 02.	70 17	5 80	
Philippines	51.014 100.0 68.361 100.0 92.706 100.0 96.207 100.0 98.999 200.0 99.920 200.0 94.214 100.0 90.469 100.0 6.0 6.3 0.5	100.0	68,361	100.0	92,706	100.0	96,207	100.0	966, 86	100.0	99.920	100-0	14.22.41	0.00	1 697 .06	0.0	6.01.6	.3 0.	5
Agriculture Sector	14.734 28.9 18.228	28.9	18,218	26.6	26.6 23.732 25.6 24,608 25.6 25.578 25.6 24.845 24.9 25.439 27.0 26.020 28.8 4.3 5.4 2.9	25.6	24,608	3.25.6	25.378	25.6	24.8.45	24.92	5.439	0.72	26, 010	28.8	4.3 5		0
Industry Sector	15.048	15.048 29.5 22.690		33.2	33.2 33.471 36.1 34.963 36.3 35.714 36.1 35.955 36.0 32.159 34.1 28.880 31.9 8.6 8.1 2.9	36.1	34.963	36.3	35.714	36.1	35.955	36.0 3	2.159	34.1	28,830	31.9	8.6	T.	•
Service Sector	21.232 41.6 27,453	41.6	27,453	сі. З	40.2 35.503 38.3 36.636 38.1 37.907 38.3 39,120 39.1 36.616 38.9 35.579 39.3 5.3 5.3 0.0	38.3	36,636	38.1	37 -907	38.3	39,120	39.1 3	6.616	38.9	35.579	39.3	5.3	0	0
Source: Philippine Statistical Yearbook 1985 (NEDA)	tistical	Yearboo	ok 1985	(NEDA.															]

the agricultural sector maintained an annual growth rate of around 2 percent.

## 2.3.3 Regional Development

The Philippine economy is concentrated in MMA and Southern Tagalog (Region IV). The GDP shares of the MMA and Region IV are 31.6 percent and 14.0 percent respectively in 1984. The tendency of economic concentration in these two regions has continued for many years. Government efforts in recent years to promote the decentralization of industry have not yet changed the uneven pattern of regional development.

The Philippines' GDP per capita is 1,790 pesos in 1984. GDP per capita in MMA is 4,476 pesos which is 2.5 times the national average. However, the GDP per capita in MMA has been gradually decreasing since 1981 despite the increased GDP of MMA from 1981 to 1983. This is because of the rapid increase of the local population.

The GDP in MMA decreased by 6.8 percent which was greater than the drop of the (national) GDP in 1984. This is because the GDP of MMA is mostly produced by the industrial sector which suffered the greatest setback in the 1984 recession.

-17 -

Table 2.3.3 Cross Domestic Product by Region

(1.0) (0.2) (0.5) (1.4) (ທີ່ຊີ (ອີງຊີ) 6.0 0.4 1 0.0 0 0 1.1 о т 0.7 2.2 1 84 80 CROWI TAT 6.4 4-9 10.01 5.5 4.4 0.7 6.6 ം ന 6.6 5 0. 0 ດ ເມ 6.6 \$ 7 80/ 29 ы т 5 9 7 00 00 2 14.0 ς α 7.2 ຕ ຄ 32.3 30,164 31.6 ς α н г-3 95,498 100 1984 8,310 7,944 3,729 2,360 2,993 3,110 4,380 6,847 13.9 13.421 2,211 6. 53 3,571 ۲-00 80 60 2.6 8 ц Ч 1 2 3 ม -7 50 3 3 100 32,359 2,585 13,868 8,288 7,098 4, 19 4 3,787 8,731 2,328 3,324 6,564 3,087 522 100,067 1983  $\sim$ 25,729 31.1 27,476 31.2 29,224 31.5 30,521 31.7 31,511 31.8 2.7 တ ဆ н 1 5.00 2.4 സ്റ്റ 6.4 3.6 13.7 1.1 1 99,003 100 1982 3,760 2,640 3.294 8.795 8.410 6,999 13 521 3,045 6,336 2,420 3,563 4.707 PRICES 00 00 13.7 00 N 3.4 8 ŝ 3 3 t t 4.6 6.0 ۲+ ۳ 1972 96,210 100 1981 3,646 8.518 3.258 6,990 6 358: 2,697 14.0 13,239 179.7 2,391 4, 382 CONSTANT 3,261 2.978 ~ ~ ς. 2 4 ы. 4 2 00 6.8 3 ы N ¢. ₩ N m 100 AT A 1980 3, 433 PESOS 2,615 7,783 3,161 2,309 3 124 4 416 92,637 12,951 7, 162 6,727 6.279 2,973 MILLION 13.0 8.4 5 ŝ 7.0 ი ი 8 2 ы N <u>ເ</u> 1.1 ŝ 5 87,963 100 1979 7, 465 6,214 12,265 3,257 2,589 7,355 2,893 2,901 2,181 2,862 6,184 4.321 zH 14 4 3.6 00 20 8.4 3 5 N O t∽ 50 10 7.2 н 6 4 7 ຕາ ຄາ 100 1978 3,021 11,886 2,584 2,332 2,773 82,784 6,943 7,066 5,921 3,903 5,813 2,097 2,716 Southern Mindanao Northern Mindanao NCR Metro Manila Mindanao Southern Tagalog Western Mindanao Western Visayas Central Visayas Eastern Visayas Cagayan Valley Central Luzon Ilocos Region Bicol Region Philippines Central

Source: Philippine Statistical Yearbook 1985 NEDA

-18-

				and the second second			
		PESOS	5 AT CONST	FANT 1972	PRICES		GROWTH RATE
	1979	1980	1981	1982	1983	1984	'84/'79
Philippines	1,870	1,917	1,943	1,950	1,922	1,790	(0.9)
NCR Metro Manila	4,774	4,912	4,971	4,966	4,948	4,476	(1.3)
Ilocos Region	932	967	1,010	1,021	1,009	974	0.9
Cagayan Valley	1,195	1,175	1,193	1,128	1,078	960	(4.3)
Central Luzon	1,565	1,615	1,718	1,735	1,680	1,561	(0.1)
Southern Tagalog	2,059	2,100	2,082	2,075	2,069	1,947	(1.1)
<b>Bicol Region</b>	846	907	909	833	825	781	(1.6)
Western Visayas	1,674	1,684	1,707	1,769	1,703	1,596	(0.9)
Central Visayas	1,671	1,769	1,798	1,771	1,761	1,665	(0.1)
Eastern Visayas	789	823	849	832	785	733	(1.5)
Western Mindanao	1,172	1,227	1,258	1,233	1,216	1,111	(1.1)
Northern Mindanao	1,613	1,591	1,546	1,606	1,492	1,416	(2.6)
Southern Mindanao	1,913	1,863	1,819	1,784	1,801	1,727	(2.0)
Central Mindanao	1,294	1,305	1,301	1,483	1,441	1,411	1.7

-19-

Table 2.3.4 Per Capita Gross Domestic Product by Region

Source: Philippine Statistical Yearbook 1985 (NEDA)

#### 2.3.4 Foreign Trade

The Philippines has had a persistent balance of trade deficit for more than ten years. This is because industry largely depends on imported materials such as petroleum and petroleum products, and exports are dominated by four "traditiional" products - coconut products, logs/forest products, sugar and copper concentrates.

In recent years the balance of trade improved slightly because the government took various measures including a 27.3 percent depreciation of the peso against the United States dollar on October 5, 1983 and severe government restrictions on imports.

Until 1980 traditional products accounted for over 50% of export revenues. But due to the government's aggressive development of non-traditional exports which are less susceptible to the vagaries of the international pricing mechanism, the share of non-traditional exports such as electronic goods and garments is gradually increasing.

These non-traditional exports were able to cushion the impact of the low prices of the traditional commodity exports on the world market (See Table 2.3.6 and Table 2.3.7).

The Philippines' major trading partners are the United States and Japan, together accounting for 57.3 percent of exports and for 40.3 percent of imports in 1984. The United States and Japan gave the Philippines a positive trade balance of \$373.2 million and \$228.2 million, respectively, in 1984. The value of imports from the Middle East has been decreasing due to the government's move to tap non-oil products as sources of energy.

20-

		In Mo	Willion U	.S Dollars	rs					Annual	ual Crowth	vth Rate
	1975 19	1980	1981	1982		1983	1984		1985	.80	80/175= 18	.85/180
Balance of Trade (1	(1,165) (1,	(1,939)	(2,224)	(2,646)		2,482)	(629)		( 787)	ř.	10.7	(24.2)
Exports	2,294 5,	5.788	5.722	5,021		5,005	5,391		4.629	к Г	20.3	( † * † )
Imports	3.459 7.	7.727	7.946	7.667	• •	7.487	6.070	•	5,111		17.4	(6-7)
Source: Philippine Star	Statistical Yes	Yearbook	1985 (NEDA	DA)								
	Table	Table 2.3.6	Exports	(Traditional		and Nor	and Non-traditional	tonal)	 ·	•	•	
		F.0.B.	3. Value	in Million		LLoQ. S	ราย			A		Growth Rate
1975	1980		H			1983		1984	1 1985		80/175	ΙćΟ
Exports 2.294 100.0	) 5,788 100.0	5.7	2 100.0	5,021 1	100.0 5	0 5,005 100.0	5	1 100.0	9. ≠	0.0	1	
Traditional Exports 1.767 77.0	77.0 3.068 53.0	0 2.742	6.74	2,116	42.1.2	2,068 41	1.3 1.328	8 33.9	9 1,302	28.1	11.7	(15.8)
uo to					1					(		· · ·
18. 20# 2	2,050 4	S N	21.0		56.8		<u>m.</u>	63	ev v¹	70.8	39.4	τ, τ
	1			54	1-1	16	1.8 133	N.	5 52	1-1	24.9	(5.8)
Source: Philippine Stat	Statistical Yes	Yearbook 1	1985 (NEDA	DA )		. *						
		Ча	Table 2.3.7	7 Imports	β	Commodity	ty Group	0.				
				In Million	SU	Dollars					Annual Crowth	L th Rate (%)
	1975	19	1980	1981	1982	N	1983	Ť	1984	1985	52./08.	75 85/ 80
Lmports	3, 459 100.0	.0 7,727	100.01	7.946 100.0	0 7.667	100.0 7	. 487 100.0	6.070	100.0 5.	111 100.	12.4	t (7.9
Capital Goods	1.149 33	33.2 1.986	25.7	1.925 24.2	2 1.786	23.3 I	,698 22.7	1,150	18.9	788 15	.4 II.6	(6.91) 5
Raw Materials & Int. Goods	1.166	33.7 2,855	37.0	2,886 36.3	3 3.0 42	39.7 3	3,017 40.3	2,636	43 4 2	2.198 43	43.0 19.6	5 (51)
Mineral Fuels & Lubricants	770	22.3 2,248	29.1 2	, 458 30.9	9 2,105	27.42	2,123 28.3	1,649	27.2 1	1.452 28.4	4 23.9	9 (8.4)
Consumer Coods	289 8	8.4 466	6.0	537 6.8	635	8.3	538 7.2	367	6.1	441 8.	.6 10.0	(1.1)
Others	85 2	2.4 172	2.2	140 1.8	8	1.3	111	268	4.4	232 4.	6 15.	1 6.2

Table 2.3.8 Imports by Area

			F.O.B Value		in Million		U.S. Dollars	lars			·		Annual Growth Rate
	1975	1	1980	1961		19	1982	15	1983	15	1984	1985	. 80/.75
Imports	3, 459 100.0 7,727	•0 7,727	100.0 7.946		100.0 7	7,667	100.0	7.487	7,487 100.0	6,070	100.0	5,111	17.4
United States	754 21	21.8 1,786	23.1	1,787	22.5	1,703	22.2	1,739	23.2	1,630	26.9		18.8
Japan	966 27	27.9 1,531	19.8	1,494	10.0	1,532	20.0	1,266	16.9	815	13.4		9.6
EEC	429 12.4	. 4 828	10.7	819	10.3	5 1 8 1 8	10.6	380	11.7	674	ਜ  ਜ	· · ·	14-1
Middle East	604 17	17.5 1.975	25.6	1.694	21.3	1,455	19.0	1,452	19.4	577	16.1		26.7
ASEAN	173 5	5.0 483	6.2	539	6.8	510	6.7	671	0.6	834	13.7		22.8
Socialist Countries	63	1.8 245	м. М	212	2.7	232	3.0	155	2.1	232	3.8		31.2
Other Countries	470 13	13.6 879	11.4]1	101	17.6	1,421	18.5	1,324	17.7	908	15.0		13.3
										44 14		• •	
						· · · · ·							· · · ·
		•	Table 2	2.3.9	Exports	bγ	Area			•	-		
			F.O.B Va	Value In	Million		U.S. Dol	Dollars					Annual Crowth Rate
	1975		1980	1961	T.	19	1982	ST .	1983	ST -	1984	1985	.80/175
Exports	2,294 100.0 5,788	-0 5,788	100.0	5,722 1	100.0	5,021	100.0	5,005	5,005 100.0	5,391	5.391 100.0	4,629	20.3
Tested States	T	664 28.9 1.588	27.4	1.766	30.9	1.586	31.6	1.800		36.0 2.050	38.0		₹ 0 ₹ 1

10-1 38.0 2.2 19-91 12.6 5 9.6 17.0 20.3 1.043 664 28.9 1.588 27.4 1.766 30.9 1.586 31.6 1.800 36.0 2.050 680 110 67 517 916 7.0 5 16.4 16.3 1.5 22.8 1,015 816 20 353 123 820 14.5 0.2 ÷.6 17.6 21.9 1.146 726 60 359 231 883 16.1 1.1 7.2 <del>1</del> ທີ 17.71 924 412 26.5 1.251 66 257 16.2 1,011 t 0 0 17.0 37.7 1.533 115 256 981 377 937 16.2 10:7 865 372 36 5 20 972 • Specialist Countries Other Countries United States Middle East Japan ASEAN EEC

43.9 0.0 0

30.7

12.1

-22-

#### 2.4 Transportation

#### 2.4.1 General Outline

There are four main transport system in the Philippines.

- <u>Road transport:</u> This is the principal transport system of the country and accounts for sixty-five percent (65%) of the total domestic freight traffic and ninety percent (90%) of the total domestic passenger traffic.
- 2) Sea transport: This is the complementary system for the road transport, and carries the majority of inter-island traffic. Sea transport handles thirty-five percent (35%) of the total freight and seven percent (7%) of the passenger traffic.
- 3) <u>Railway transport:</u> The railway services in Luzon have been losing share to the road system. The condition of the north line is poor, but the south line is being refurnished.
- 4) <u>Air transport</u>: The air sector handles some inter-island and virtually all the international passenger traffic.

Along with the progress of economic development, regional development and industrialization, the capacity of the transport network will have to be expanded systematically in the future.

# 2.4.2 Roads

The Ministry of Public Works and Highways (MPWH) is responsible for the construction and maintenance of roads and bridges in this country. As of 1984, the road network totalled 157,140 kilometers, 87.3 percent of which was unpaved. National roads measured 25,117 kilometers or 16.0 percent of the total (See Appendix 2.4.1).

Trunk roads connecting the major cities have been developed. However, roads in rural areas are not yet well developed.

-23-

#### 2.4.3 Railways

There are two (2) railway systems in the Philippinos: The Philippine National Railways (PNR) and the Philippine Railway Company. At present, the PNR owns two main railway lines (See Fig. 2.4.1). One is the North Line that runs from Metro Manila to San Fernando, La Union in the North. The other is the South Line that runs from Metro Manila to Legaspi, Albay in the South. The North Line measures 266 kilometers and the South Line 474 kilometers. (The rolling stock inventory for 1983 is shown in Appendix 2.4.2).

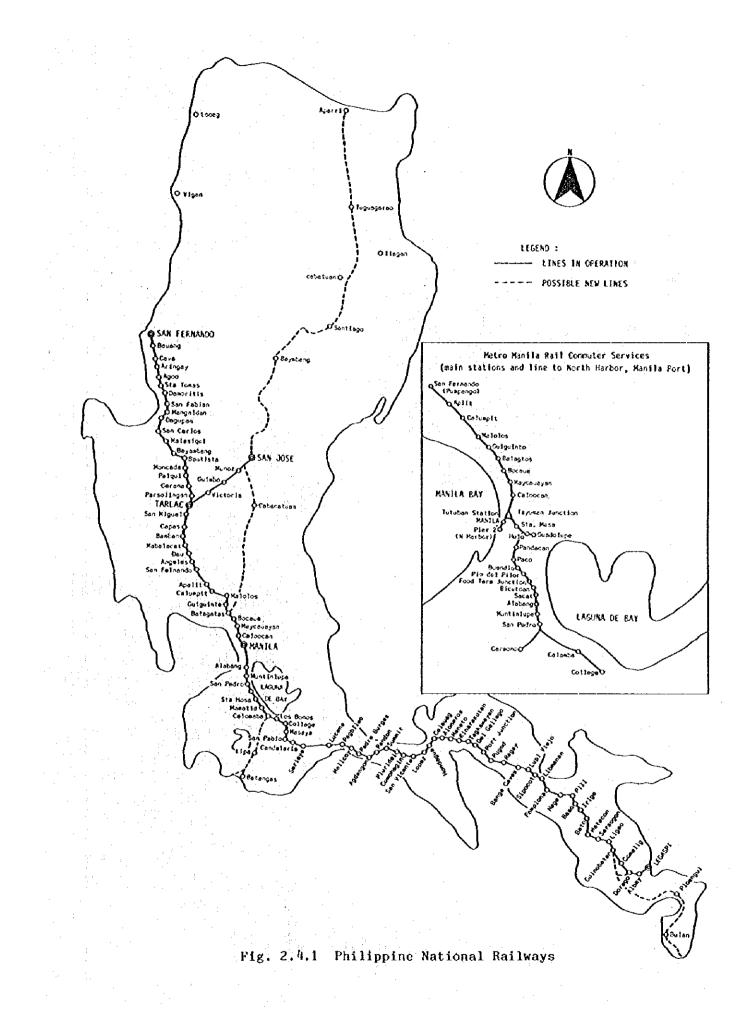
The number of railways passengers decreased by 7.7 percent in 1984, but there was a considerable gain of 34.5 percent in revenue. The volume of railway freight has been decreasing for twenty-five years since 1960. (Traffic volume and revenue for railways (PNR) are shown in Appendix 2.4.3).

### 2.4.4 Ports and Shipping

In the Philippines there are at present nineteen (19) base ports, sixty-eight (68) sub-ports, five hundred and four (504) municipal ports and numerous private ports under the supervision of 19 port management units (See Table 2.4.1). The Philippine domestic operating fleet by type of vessel is shown in Table 2.4.2. The number of vessels engaged in foreign shipping is shown in Table 2.4.3. Table 2.4.4 presents the number of passengers transported at the major ports all over the country. A total of 8.2 million passengers passed through the ports in 1983, 24.56 percent of which either embarked or disembarked in Cebu. Table 2.4.5 shows the cargo movement in the different ports. There was a total throughput of 17.3 million metric tons of cargo for both domestic and foreign trade in 1983, The leading ports with the greatest volume of cargo were the ports of Manila, Cebu and Zamboanga.

The ports in San Fernando, La Union and Aparri, Cagayan are used mainly as cargo ports. Table 2.4.6 shows the number and tonnage of vessels engaged in domestic trade which entered and were cleared at the major ports.

--- 24 ---



-25-

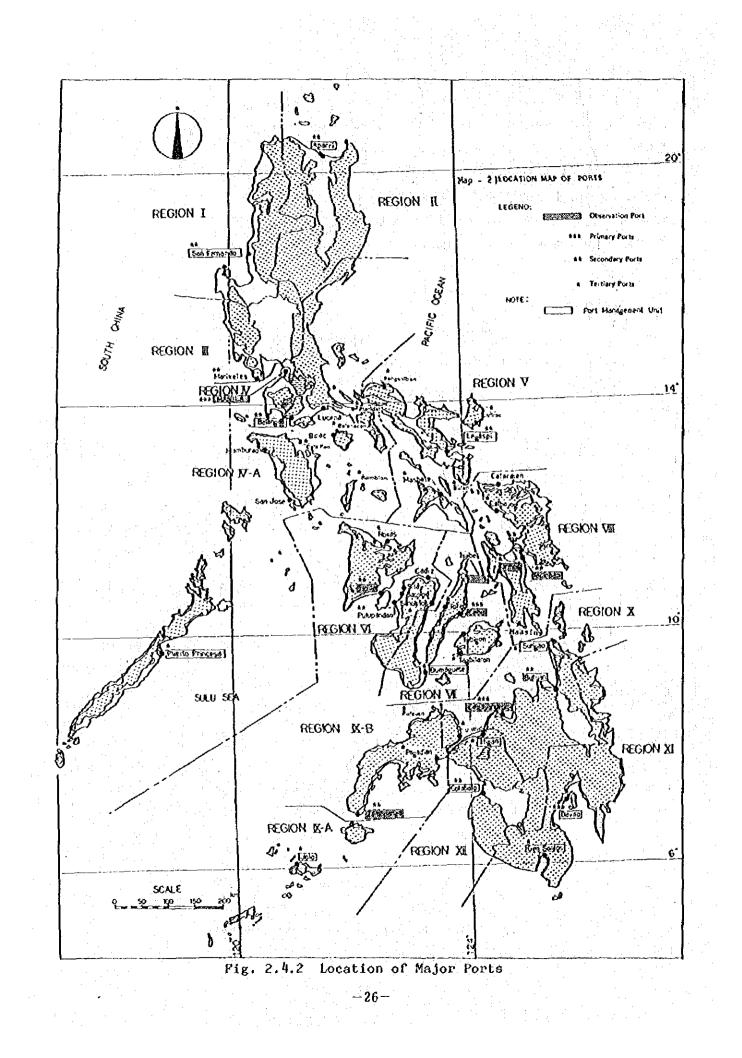


Table 2.4.1 Philippine Port System by Port Management Unit: 1986

	· ·	1. A S. S.			
Port Nanagement Unit	Total	PPA Base Ports	PPA Sub-Ports	Other National/ Municipal Ports	Private Ports/ Loading Ports
Total	905	19	68	504	314
BATANGAS	83	1	7	49	26
CAGAYAN DE ORO	32	· · · <b>1</b> · ·	2	12	17
CEBU	87	1	9 ·	51	26
DAVAO	27	1	: <b>1</b>	9	16
	(	2 operati unit			а. А.
DUMAGUETE	16	1	5	2	8
GENERAL SANTOS	9	1	~	3	5
ILIGAN	59	1	1	41	16
ILOILO	64	1	8	16	39
IRENB	15	1	2	7	5 :
JOLO	33	1	· · 3	28	1
LEGASPI	55	1	· 6	35	13
MANILA	72	1	4	28	39
$ \begin{array}{c} \mathcal{T}^{(0)} = \left\{ \begin{array}{c} \mathcal{T}_{0} \\ \mathcal{T}$		4 operatii unit			
MASAO	31	1	2	3	25
POLLOC	16	1	2	3	10
PUERTO PRINCESA	28	1	1	13	13
SAN FERNANDO (L.U.)	35	1	1	26	7
SURICÃO	70	1	1	59	9
TACLOBAN	133	1	9	97	26
ZAMBOANGA	40	1	4	. 22	13
0 000	•	······	• • • • • • • • • • • • • • • • • • • •	• · · · · · · · · · · · · · · · · · · ·	

Source: PPA

-27-

# Table 2.4.2 Philippine Domestic Operating Fleet by Type of Vessel: 1982 and 1983

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		1983		1982
Type of Vessel	Number	Gross Tonnage	Number	Gross Tonnage
Total	4,479	-	3,631	<b>-</b>
PASSENGER FERRY	119	11,822	101	11,777.10
PASSENGER CARCO	559	177,699	344	183,156.00
GENERAL CARCO	1,008	441,996	986	444,780.00
SEMI-CONTAINER	-		- <del></del>	-
CONTAINER	28	51,841	30	55,790.80
RORO (roll on roll of)	-	· · · · ·	-	-
BULK CARRIER	-	-	-	_ * _ *
LIGHTER	17	2,803	17	2,804.56
BARGE	793	333,280	815	339,938.00
OIL TANKER	72	139,730	75	141,580.00
PARCEL TANKER	- 1		-	
TUG BOAT	345	38,029	332	37,213.30
FISHING BOAT	662	32,064	267	23,087.30
PLEASURE BOAT	32	6,330	31	6,368.62
PILOT BOAT	5	67	-	
SALVAGE VESSEL	.2.	104	2	105.38
PASSENGER/CONTAINER	24	24,530	12	26,086.30
OTHERS	14	920		-
NO INFORMATION	799	93,892	619	95,879.70

Source: Philippine Yearbook 1985

-28-

# Table 2.4.3 Philippine Registered Overseas Fleet by Type of Vessel: 1982 and 1983

		1983		1982
Type of Vessel	Number	Gross Tonnage	Number	Gross Tonnage
Total	257	-	203	-
GENERAL CARGO	76	433,105.84	68	388,134.00
BULK CARRIER	78	1,300,065.97	.59	925,443.00
TANKER	10	485,919.89	9	484,385.00
RORO	2	9,412.07	3	30,745.90
MULTI-PURPOSE	2	19,502.04	10	124,880.00
LOG CARRIER	12	62,419.45	2	10,399.50
REEFER	10	83,125.46	10	72,648.60
CONTAINER	<b>_</b>		4	8,047.62
CAR CARRIER	8	102,887.98	6	86,509.30
FEELER	~	_	1	1,226.00
LIVESTOCK CARRIER	10	27,923.35	3	4,220.13
GENERAL CARCO/CONTAINER	: 32.	241,770.42	11	42,887.90
TUGBOAT	10	2,986.95	15	4,054.23
PASSENGER/CARCO	1	18,832.00	1	18,832.00
ORE/BULK CARRIER	4	147,265.00	1	53,504.00
REFRIGERATED CARCO	1	4,966.12	-	-
PISHING VESSEL	- 1	1,581.00	<b>-</b> .	<b>–</b> .

Source: Philippine Yearbook 1985

Table 2.4.4 Domestic Passenger Traffic by Major Ports: 1982 and 1983

Disembarked 1,665,739 991,119 991,119 991,119 664,533 864,533 864,533 88,040 88,555 49,458 209,618 167,304 97,943 148,113 135,409 22,123 55,553 11,990 1,271,392 5,748,335,284,740 7,552 1 334,185 109,178 36,148 73,230 72,663 72,663 229,206 145,563 68,794 27,127 70,712 5,569,986 1,244,32210,8931,232,398110,411 127,364 7,556 1,722.516 286,163 Embarked 607,11 1982 i 1 ١ 3,388,225 1,273,538 625,304 625,304 67,338 137,338 137,238 894,954 894,954 894,954 2,529,062 438,824 312,867 204,203 49,250 126,265 208.354 275,477 15,108 2,389 1,318,972 2,503,790 ı Total Disembarked 118,426 112,201 787,696 9,240 381,117 222,561 50,622 14,761 35,861 35,861 35,861 35,270 951,916 951,916 8,637 45,371 75,629 4,161,065 68,591 13,261 778.392 3,239 41.911 1,000,43 1 Embarked 4,074,560 779,132 8,818 770,286 1,022,558 405,397 276,830 61,906 ൽ 73,924 17,758 121.385 97,095 15,919 58,966 3, 438 18:3 F8 14,145 44,179 842,269 159,885 47,761 1983 1,566,828 18,058 1,548,678 2,022,989 786,514 116,939 31,019 87,482 239,811 209,296 24,556 104,337 <sup>499</sup>,391 112,528 28,906 83,622 80,449 8,235,625 794,185 149,553 6,677 Tota. North Harbor South Harbor Pasig River PUERTO PRINCESA Base Ports CACAYAN DE ORO CENERAL SANTOS Sta. Ana SAN FERNANDO BATANCAS Sasa ZAMBOANGA Total DUMAGUETE TACLOBAN TLOILO SURICAO LECASPI VANJLA POLLOC ILICAN BUTUAN APPARI DAVAO o lo lo CEBU

a: January to June

Source: Philippine Yearbook 1985

Table 2.4.5 Cargo Movement by Major Ports at Berth and Anchorage: 1983

107,622 27,649 7,000 106,077 1,655 48,451 48,451 6.601.229 6,114,055 6,006,434 11.571 106.967 35.200 4,813 15,128 22,663 EXPORT FOREIGN TRADE 383,307 458,929 8,695 7,5835 27,588 28,597 28,597 28,597 28,597 28,597 28,597 28,597 27,588 27,597 27,588 27,597 2 13,535 96,543 997 2,628 1,822,482 1,135,586 39,925 1.518,893 INPORT 490,929 86,578 50,664 114,772 76,039 76,039 76,039 8.323.712 25,107 203,510 36,197 7,441 5,450 62,588 7.632.949 7,142,020 TOTAL I 439,548 237,652 237,652 244,323 150,037 150,037 150,037 150,037 13,008 68,691 54,940 37,953 37,953 37,953 37,953 1,737,777 1,703,994 3.549.680 8.719 33.087 33,783 2,470 OUTWARD DOMESTIC TRADE 2,370,037 1,808,030 759,267 220,954 154,139 636,873 77,139,458 175,458 177,119 177,458 91,3668 91,869 91,869 80,072 80,072 31,434 23,368 1,646 29,610 43,009 5.467.877 562,007 291,215 INWARD 4,107,814 3,512,024 1,198,809 458,606 314,803 881,196 9:017,556 357,744 302,463 55,281 292,230 184,750 165,516 160,559 179,974 88,089 67,432 51,728 64,521 31,331 595.790 117,124 4,116 219,21 TOTAL TOTAL 17.341.268 11.740.763 3.512.024 7.142.020 595,790 1,285,387 509,270 429,575 888,486 433,783 75,281 75,281 75,281 75,281 75,281 75,281 75,281 1709,677 1728 82,550 4,521 82,550 4,521 4,116 4,116 291,215 Internat'l Port PUERTO PRINCESA ILOILO CAGAYAN DE ORO CENERAL SANTOS South Harbor North Harbor Pasig River SAN FERNANDO Sta. Ana BASE PORTS ZAMBOANGA DUMACUETE Total BATANCAS TACLOBAN Sasa 1983 SURICAO MANILA LECASPI DAVAO TLICAN POLIOC BUTUAN APARRI JOLO

Source: Philippine Yearbook 1985

31-

Table 2.4.6 Number and Tonnage of Vessels Entered

Cleared in Selected ports, Domestic and International: 1979-1984

and

Tonnage in Thousands

6.519 6,772 7,880 6,557 46.854 200 7.977 066 7,097 45,765 53.287 55.887 OTHERS 11 Ę. ILOILO ZAMBOANGA 25.4 288 865 236 688 2,037 245 366 230 283 2.058 317 1 ł TRADE 122 600 577 923 360 33.4 601 456 337 358 1,535 1.511 1 1 ) t T N Ś ÷ -FOREICN 3,754 3,390 1,002 89 80 80 914 525 840 806 2.814 760 3.316 608 CEBU I ŧ ŧ 1 ŝ ŝ 14,690 5,702 37,595 -77,310 23,804 5,340 4,105 4,019 23,254 3,592 MANILA 4,880 19,054 72,492 19,276 23.192 19.932 13,561 13, 478 73,582 74,331 13,193 79.089 13,279 82.551 11,418 i. TOTAL ŧ 75,004 38,433 21,184 37.595 20.818 65,185 33,775 19,233 63.527 35.023 19.156 64.592 39.403 22.392 56,548 33,597 67,172 20.601 OTHERS TRADE 16,218 5,859 3,318 15,429 5,551 3,135 15,461 5,759 3,215 15.349 5.797 3.316 14.370 6.437 3.694 13, 345 6, 473 3, 586 DOMESTIC ZAMBOANCA 15,566 8,038 7,735 7.290 16.959 8.411 8.130 4, 429 12,595 8,472 8,047 7,402 122 4,008 13,609 7,437 7,237 ILOILO Source: Philippine Statistical Yearbook 1985 4 32.629 11.433 8.577 29,935 11,770 9,054 26.654 10.928 8.572 25,219 12,764 10,797 24,935 14,661 10,315 22,235 16,676 8,143 CEBU 19,074 23,271 18,984 21,886 16,230 10,381 22,178 20,268 23, C80 18, 482 10, 886 21,508 12,976 11,030 10.920 21,330 22,801 MANILA 140.307 89,446 56.614 162,497 82,245 51,700 No. of Vessels 152,798 Cross Tonnage 82,519 Net Tonnage 52,137 No. of Vessels 143,583 Gross Tonnage 73,886 Net Tonnage 48,443 No. of Vessels 139,433 Gross Tonnage 79,948 Net Tonnage 51,669 No. of Vessels 126,901 Gross Tonnage 85,487 Net Tonnage 51,407 TOTAL No. of Vessels No. of Vessels නේ Cross Tonnage Cross Tonnage YEAR VESSELS Net Tonnage Net Tonnage Net Tonnage Net Tonnage TONNAGE 1979 0861 983 1981 1984 982

-32-

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