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Revisiting Domestic Philippine Industries in the First Half of the 20th Century: The Genesis and Development of the Embroidery and Shoemaking Industries

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Revisiting Domestic Philippine Industries in the First Half of the 20th Century: The Genesis and Development of the Embroidery and Shoemaking Industries

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1. Introduction

The Philippine economy in the first half of the 20th century was shaped by the benefits of free trade with the United States. In the Philippines, where agriculture is the mainstay of economic activities, a monocultural economy had been established since the Spanish colonial era, producing raw materials such as sugar, coconuts, *abaca* (a form of hemp), and tobacco, but the emergence of a new market, the United States, dramatically increased the country's export production (Doeppers 1984:9)[i]. The influence was far-reaching and decisive. It led not only to an export boom in commerce, transportation, warehousing, and stevedoring, but also gave further momentum to the importing of consumer goods from the United States, contributing significantly to the growth of retailing and wholesaling (Hartendorp 1953: 45; Hayase 2012). However, the export-oriented economy aimed at the U.S. market also brought new challenges. One of these was that no new manufacturing industries had developed that could absorb the available labor supply, due to the importation of high-quality consumer goods. The benefits of increased exportation of raw materials, such as sugar and coconuts, certainly led to the development of the transportation and public works sectors, such as the construction of ports and roads. However, wealth made from such exports by the local Filipino elite, who mainly settled in the capital city, Manila, flowed into real estate investments, leading to a construction boom, but did not foster new manufacturing industries (Doeppers 1984:16-17,43–44, 51).

The Philippine colonial government was not unaware of the need to industrialize its economy. In 1919, the National Development Company was established to promote the domestic manufacturing industry, and took the lead in industrialization[ii]. In 1922, the Cebu Portland Cement Company started operations as a subsidy (Brown 1989: 206-209; Hartendorp 1953:45-47). These efforts aimed to bring about a structural transformation of the colonial economy, but they were highly dependent on U.S. imports and failed to produce any notable results. Within the framework of free trade with the U.S., the chances for diversifying the Philippine economy were limited. Faced with stiff competition from Japanese imports, the Philippines was also fueled by the sugar and gold booms, so the

economy relying on free trade with the U.S. was the most realistic option for making money quickly.

Under these circumstances, it is worth noting that two new types of manufacturing industries emerged, one with domestic and the other with overseas markets: shoemaking and embroidery. Both were not productive due to the lack of mechanization, but rather required skilled labor. The embroidery industry grew rapidly to an export position second only to cash crops, such as sugar and coconuts, by importing cotton cloth from the U.S. and then reexporting the finished goods to the U.S. market. The shoemaking industry, by contrast, experienced tremendous growth after World War II and became the driving force of economic growth through the import-substitution industries of 1950s. The study of how these two industries emerged and developed is of great use for understanding the characteristics of the Philippine economy in the first half of the 20th century. The purpose of this paper is to provide a historical account of the genesis and growth of the Philippine embroidery and shoemaking industries.

2. Craftsman–entrepreneurs as pillars of the manufacturing industry

It is well known that, in the post-World War II environment, the Philippine economy achieved a certain degree of industrialization through a government-led import-substitution policy (Yoshihara 1985). John Carroll, who examined the origins and characteristics of the industrial entrepreneurship that led to the industrialization in the Philippines from the historical and sociological perspectives, wrote *The Filipino Manufacturing Entrepreneur* (Cornell University Press 1964), in which he made the following points (1964:116–124): some entrepreneurs who succeeded during the postwar industrialization period had been operating since before World War II, and unlike those entrepreneurs who benefited from the preferential government incentives such as tax exemptions and dollar allocations in the 1950s, they can be described as "craftsman–entrepreneurs" who achieved social and occupational mobility from their particular craft skills. Not growing up in a privileged environment or inheriting a going industrial concern from their parents, these entrepreneurs rose to prominence based solely on their personal talents and/or abilities. Although they were generally poorly educated, most had entered the manufacturing industry at a relatively early age after acquiring their technical skills.

Carroll (1964:122) also pointed out that the industries in which such craftsman–entrepreneurs emerged included shoemaking, furniture-making, drug manufacturing, radio manufacturing, baking, printing, battery manufacturing, leather tanning, and electrical machinery manufacturing. All of these industries required specific skills. For wealthy

Filipinos, land and houses were where they invested their surplus wealth during the Spanish and American colonial periods; they had limited experience with manufacturing and little or no interest in developing new industries, especially for the domestic market (Carroll 1964: 29–38). By contrast, for those from lower class backgrounds, who worked as skilled laborers or wage earners, the challenge of building a new manufacturing business was one they pursued for upward social mobility.[iii] Interestingly, there were several entrepreneurs who ran small repair shops before starting larger manufacturing firms (Carroll 1964:117). Repair shops could be opened without capital, but they did require a certain level of skill. This suggests that, for those from the lower classes, the mastery of a craft was the gateway to starting a business in manufacturing.

Embroidery, which has become an important export industry in the Philippines, does not seem to fit into this entrepreneurial category. In addition to the unique division of labor within the Philippines, the export of Philippine embroidery was mediated by the global network of the Syrian-American diaspora, between the New York market in the United States and the Philippines. The potential demand in the United States for Philippine embroidery was discovered by American military servicemen stationed in the Philippines, and its export share rose rapidly by being shipped to the U.S. as a new commodity. The combination of Philippine embroidery with the new market of the United States led to the development of a new domestic manufacturing industry.

3. The embroidery and shoemaking industries in the first half of the 20th century

We can identify the major characteristics of the embroidery and shoemaking industries using data from the 1903 (United States Bureau of the Census 1905) and 1918 censuses (The Government of the Philippines, Census Office of the Philippine Islands 1921) and the *Directory of Industrial Establishments 1940–1941* (Commonwealth of the Philippines 1940). In the 1903 census, embroidery was not classified as an industry. It is reasonable to assume that shoes were included in two categories: boots and shoes, slippers and boots and shoes. Weaving and clothmaking had been practiced before the Spanish colonial period and were considered the principal household industry in which women were engaged (United States Bureau of the Census 1905, Vol. IV, 464).[iv] Although embroidery was applied to women's handkerchiefs and scarves, it is highly likely that it was also recognized as a design element that enhanced textiles' aesthetic value. According to the 1903 census, there were seven manufacturers (in two provinces) of garments made from *piña* (fibers from pineapple leaves) and abaca, as well as 34 firms (in three provinces) that manufactured women's clothing from *jusi* (from abaca fibers). In 1903, shoemaking was divided into two categories, "boots and footwear" and "boots, footwear, and slippers," and

there were, respectively, 98 firms (in 17 provinces) and 80 firms (in two provinces) engaged in this work. At that time, shoemaking was the third-fastest growing manufacturing industry in the Philippines (United States Bureau of the Census 1905, Vol. IV, 486).

The 1918 census included new entries for shoemaking and embroidery (The Government of the Philippines, Census Office of the Philippine Islands 1921, Vol. IV, Part I, 197–211). It listed 115 embroidery firms, whereas the number of shoemaking industries, with boots and footwear classified as "shoe manufacturers and dealers," and boots, footwear, and slippers as "slipper manufacturers and dealers," had nearly doubled, to 138 and 198, respectively (Table 1). These figures indicate that, since the beginning of the American period, the embroidery and shoemaking industries had vigorously developed their production to satisfy market demands both at home and abroad. To grasp the reality of such quantitative expansions more accurately, it is necessary to understand their relationships with other, related industries. In the case of embroidery, the firms for garment production using traditional textiles and materials, such as piña and jusi, went from 7 to 3 and from 34 to 24, respectively. Further, textile factories were added, bringing the total number of enterprises to 96. This suggests the gradual decline of the traditional textile industry and the rapid shift to mass factory production.

The background for the separation of embroidery classifications was related to its recognition as a new overseas market commodity for export. Embroidery was just not a design that enhanced the aesthetics of clothing; rather, it was viewed as a totally independent consumer commodity such as children's underwear and frocks as well as ladies' nightgown, chemise (Yearbook of the Philippine Islands 1920:176-182). At that time, the Philippines had only one British-owned spinning mill, Tondo and Malabon Cotton Mills, operating in the Tondo district of Manila. It was difficult for the country to obtain cotton yarn (cotton fabric) domestically (Doeppers 1984:17); hence, embroidery was done on cotton cloth and/or linen imported and then reexported back to the U.S. In addition to manufacturers, the 1918 census included the classification of "household industry" (The Government of the Philippines, Census Office of the Philippine Islands 1921, Vol. IV, Part 1, 577–599). There were four categories: embroidery-making, lace-making, shoe-making, and slipper-making (Table 2). The number of households engaged in embroidery- and lace-making were 2,360 and 56 respectively, while the totals for shoe- and slipper-making were 93 and 265, respectively. The total number of reported households engaged in industry was 15,791, with embroidery second to tailoring, accounting for 15% of the total (The Government of the Philippines, Census Office of the Philippine Islands 1921, Vol. IV, Part 1, 624–756). This clearly shows that the growing demand for embroidery in the U.S. market had a heavy influence on household industry.

Next, we can confirm the subsequent changes from the *Directory of Industrial Establishments 1940–1941* (Commonwealth of the Philippines 1940). While there were 94 embroidery companies, none were listed as lace producers or lace-makers. The numbers of piña, jusi, and *sinamay* (abaca fiber) enterprises were listed as 22, 15, and 11, respectively (Table 3). There were 53 shoe manufacturers and 69 slipper-makers. There was one reported new rubber shoe company and 22 firms producing slippers made of abaca. Although the *Directory* does not provide a picture of household industries, it is reasonable to assume that embroidery, garment-making using traditional textile materials, shoemaking, and slipper-making had developed even in provincial areas to meet domestic demand and as side businesses to sustain the manufacturing industry.

4. The embroidery industry

4-1. The U.S. market, Syrian Americans, and the new commodity of embroidery

Traditionally, in the Philippines, textile production using natural fibers such as palms, plants, and trees has been carried out by women. Pineapple fiber, or piña, was well known for its silky texture and beauty and was often used for women's clothing. Fascinated by the art of producing piña's embroidered textiles, the Spanish colonizers sought to take advantage of them to augment the colonial economy. From the mid-to-late 19th century, fabrics such as piña, jusi, and sinamay were exported from the Philippines (United States, Bureau of the Census 1905, IV, 467). At the same time, embroidery was taught to their pupils by Catholic nuns from Spain, France, and even Belgium, who brought European-style embroidery design and techniques to help orphaned Spanish and Filipino girls become financially independent (Ramos 2016:25; McReynolds 1980:128; Waddington 1920:177). Women who mastered the art of embroidery were called *bordadoras* (Camagay 1995,39-44). The historical origins of this embroidery help us to understand why embroidery was not recognized as a separate industry in the 1903 census (Ramos 2016:1–29; March 1899:203).

It was not until the American colonial period that embroidery began to find its value as a commodity and to be customized for the U.S. market (Garrett 2016:281–295; Waddington 1920:178). From the earliest days of U.S. colonial rule, Americans were overwhelmed by the Filipinos' weaving skills, especially their embroidery techniques and designs. The 1903 census noted that "some of the women have developed considerable skills in this special pattern weaving, which is really a kind of embroidery, and produce designs and figures of decided artistic merit" (United States Bureau of the Census 1905, IV, 466). U.S. military servicemen stationed in the Philippines, fascinated by its high level of artistic quality, introduced Filipino embroidery to the mainland U.S. Their purchases of souvenirs for their wives, sisters, and girlfriends at home made Philippine-produced embroidery

popular in the United States (March 1899:203). However, the supply of fabric itself was limited and far from commercialized, so they recommended that cotton, silk, linen, and other fabrics be imported from abroad (United States Bureau of the Census 1905, IV, 466). It is noteworthy that the import of cotton made Philippine embroidery into an important major export commodity, after sugar, coconut, abaca, and tobacco, after the 1910s (Clarence-Smith n.d. 17; Porter 1941:74). Embroidered cotton cloth shipped to the U.S. market succeeded in creating a new industrial sector within the Philippine manufacturing sector: embroidery.

The beginning of World War I marked a new era of Philippine embroidery as an export commodity. Until then, the United States had mainly imported embroidery from European countries, such as Germany and France. However, the disrupted shipping operations caused by the war and other factors made it possible for the Philippines to fill the market shortage. The value of Philippine exports, which had been 352,338 pesos in 1913, before the outbreak of the war, jumped almost 20 times, to as high as 6,913,004 pesos, five years later, in 1919 (Table 4). Right after the end of World War I, the exports marked as high as 15,623,567 pesos in 1920. In 1940, embroidery became also the fifth-largest export item, after sugar, coconuts, abaca, and tobacco (Porter 1941: 74). However, following World War I, exports declined due to increased levels of embroidery imports from France and Puerto Rico (*The Philippines Herald Year Book*, September 23, 1933). Despite high tariffs on imported embroidery products from all countries, Philippine embroidery faced difficulties in expanding its U.S. market.

The above explanation only partially explains why Philippine-made embroidery penetrated the U.S. market. This is because the U.S. garment market was deeply infiltrated by Syrian-American merchants and traders, and Philippine imports would not have been possible without their global network (Garrett 2016:281–295). Clarence-Smith points out that the Philippine embroidery business was dominated at the time by these Syrian-American merchants in Manila (Clarence-Smith n.d.:32-33). In particular, they had close ties to the Syrian diaspora, who dominated the New York garment market[v]. In other words, the expansion of the Philippine embroidery industry in the U.S. was a product mediated by Syrians' immigration to the Philippines.

One of those who worked in both New York and the Philippines was Elias Mallouk, a trader of Syrian descent. He and his brothers operated an embroidery business in the Philippines (Clarence-Smith 2004:450). Their embroidery business entry in *Rosenstock's Directory of China and Manila 1920* lists "Elias Mallouk & Brothers" (Figure 1). The Syrian Americans, whose compatriots and headquarters were in New York, re-exported to the Philippines the embroidery business model they had used on the island of Madeira, a

Portuguese territory (Garrett 2016:285; Fahrenthold, May 10, 2023). In addition, *the 1920 Yearbook of the Philippine Islands* (1920:176, 179, 180, 181) includes an advertisement for a Syrian merchant, Bardwill Brothers, the headquarter of which was located at New York City. Everett Heaney & Co. had also a factory in Manila called Ehco Embroidery while its head office was located on Broadway in New York City. Furthermore, there were some companies such as Geo Borgfeledt & Co. that had a branch even in Paris, France, all of which were common in establishing the extensive global network for embroidery business. In this way, the Philippines came to be incorporated as a production factory in the global embroidery business dominated by Syrian Americans (Clarence-Smith 2004:449-451; Fahrenthold, May 10, 2023; Garrett 2016:277, 283-285).

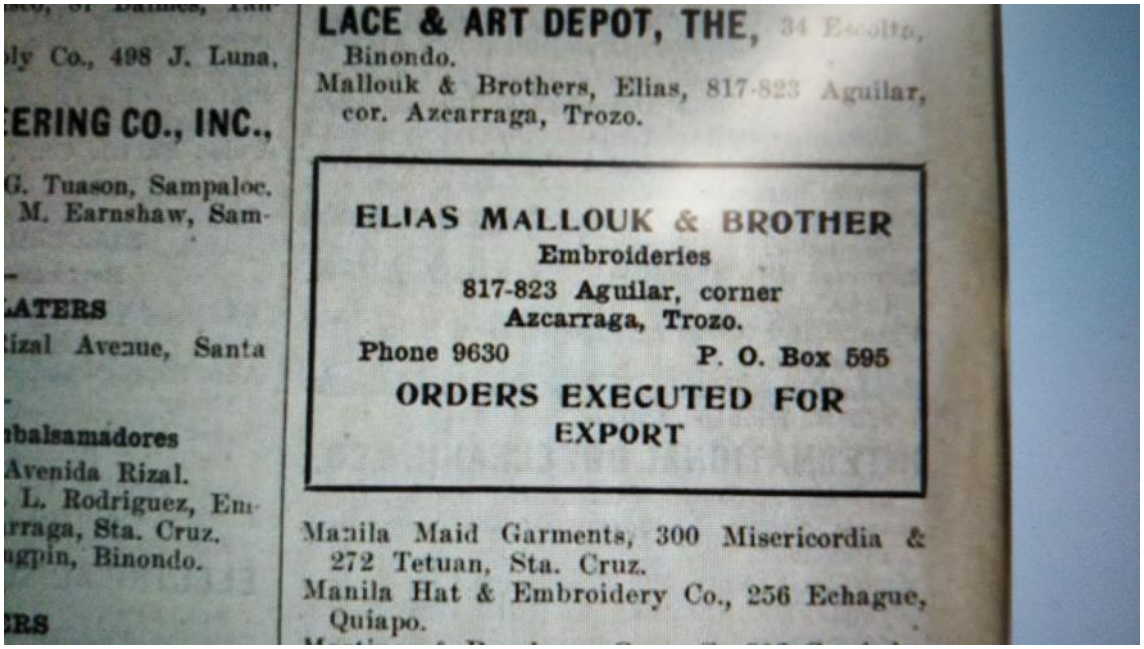

Figure 1: Advertisement by Elisa Mallouk & Brothers, Inc., a Syrian-American-owned business (Rosenstock 1920: 616)

4-2. The response from the Philippines as a supplier country: The establishment of the School of Household Industry

The Philippine embroidery industry, which expanded its exports to make up for shortages in the U.S. market caused by World War I, was supported by a unique division of labor system involving Manila and neighboring provinces. In 1912, before the outbreak of the war, some representatives of U.S. embroidery exporters visited the Philippines to explore the possibility of mass production (*The School of Household Industries* 1912:61). They must have thought that the possibility of producing and exporting embroidery in the

Philippines, where there were no tariffs, would give them a strong market advantage over their previous exporters, Switzerland, France, Germany, and the United Kingdom. Seeing a once-in-a-lifetime opportunity to expand its exports, the Philippine colonial government, led by the Bureau of Education, established the School of Household Industries, in Manila, to promote embroidery and lace production for export (*The School of Household Industries* 1912:61).[vi] Once a student had completed her studies, she was expected to return to her hometown and/or the countryside to pass on her acquired skills and expand embroidery production. This was not simply to boost exports, but also to improve the earning capacity essential for supporting a family (Ramos 2016:43). This was in line with the Philippine colonial government's major emphasis on industrial education to nurture craftsmanship. The Bureau of Education lauded the challenge by the School of Household Industries as a "new movement" (*The School of Household Industries* 1912:60).

Fully aware that the production volume of embroidery could not keep up with overseas demand, the Philippine colonial government's response was swift. On January 29, 1912, the Philippine Legislature by Act No. 2110 appropriated 100,000 pesos to establish the aforementioned industrial school in Manila (The Government of the Philippine Islands 1912:20). Another bill soon followed, in February of the same year, allocating an additional 50,000 pesos. The school aimed to recruit nearly 300 primary school-aged girls (Grades 1–4) from around the country to teach them basic skills such as embroidery, lace-making, and sewing in an intensive, six-month program. It is noteworthy that the ultimate goal was not only to help them acquire and then transmit their skills, but also to allow a student to "set up herself up in the embroidery or lace-making business (*The School of House Industries* 1912:62);" that is, to nurture and develop new entrepreneurs in local crafting businesses.

Little is known about whether the industrial school served its intended purpose. The school closed in December 1916, having turned out 800 graduates (The Government of the Philippine Islands 1917:27). Regardless of its success or failure, it is worth noting that school education in the Philippines was a major contributor to the emergence of Philippine-made embroidery as U.S. overseas market commodity. According to Garrett (2016:289-290), a scholar of the Syrian diaspora, compulsory elementary education began in 1910, and vocational/industrial training was to be included in the curriculum. This suggests that the school was not only a place to learn embroidery and lace-making skills, but in fact became a factory where embroidery and lace pieces created by the students were made into finished products for export. The Bureau of Education itself was contracted to produce embroidered items, and to fulfill its quotas, the girls were forced to work without pay (Garrett 2016: 289). In short, the Philippine government was trying to create a system for export-oriented

embroidery and lace-making by involving not only the legislature and the Bureau of Education, but also the schools, in order to increase its advantage in the U.S. market[vii].

4-3. Relationships among embroidery firms, agents, and workers in Manila

Now let us examine the peculiar division of labor behind the dramatic expansion of Philippine-made embroidery after World War I. Since the 1918 census does not distinguish between the types of embroidery and lace-making firms, we will rely on the *Manila City Directory 1937–1938* (Philippine Education Company 1938:493). It lists 27 manufacturing factories and 41 import–export companies. Among the factories, 17 were also engaged in the import–export business, which means that more than half of the manufacturers were also serving as importer-exporters. It is important to note that these factories were not engaged in embroidery or lace production; they were only responsible for embroidery design, cotton cutting, sewing, finishing, ribboning, ironing, and packaging. They did not manage the embroidery production. The number of workers employed as embroiderers in these manufacturing factories varied from 5 to 100, but there were only about 1,700 workers in Manila as a whole (Rama 1920:73, *Monthly Labor Review*, February 1941:454-455).

The Manila-based factories or import–export firms were called *Casa Sucursal*, or branches (Figure 2). Their parent companies, located in the United States, were called the *Casa Central,* or headquarters. The embroiderers and lace-makers were women engaged in domestic labor in the neighboring provinces of Manila, and the intermediaries or agents between them and the branch were called *cabecillas* (masters) (Valdepeñas and Bautista 1977:103-104).[viii] A cabecilla was usually a woman. They received cotton and linen fabrics from the branch office, hired and supervised the embroiderers and were responsible for them, and delivered the finished products to the branch. Depending on the size of the company, branches employed between 10 and 100 agents. They covered the districts of Manila (Paco, Tondo, Ermita, Malate, and Santa Anna), Rizal (Marikina, Parañaque), Batangas (Taar), Bulacan (Calumpit, Hagonoy), some parts of Pampanga and Tarlac, and as far away as the Visayas region (Rama 1920:72–73). Embroiderers, by contrast, were called bordadoras (Gabriel 1926). The number of bordadoras at the end of the embroidery industry has been estimated to have reached 60,000 in Manila and its vicinity (Rama 1929:73) and 500,000 throughout the Philippines (Gabriel 1926: 4). Among them were children mobilized to make embroidery

What is characteristic here is the relationship between the Casa Sucrusal and her cabecilla agents (Gabriel 1926:11-17). The structure was quite simple: the former would pay the latter a labor wage per finished embroidered product piece. Between 1920 and 1921, when embroidery was booming, the labor wage paid by a branch office for each finished

embroidered piece was four pesos. How much of that was paid to the bordadora was up to the cabecilla. In other words, in principle, who bore responsibility for the product, was assumed by the cabecilla. They were also held responsible for any losses or damage and were required to cope free of charge if goods were judged as defective. The Casa Sucrusal was required to pledge real estate equal to or greater than the value of the fabric, in order to give the cotton fabric to the cabecilla, provided that it was completed by the due date. Given these responsibilities, to become a cabecilla, one needed at least 500 pesos in cash or real estate worth about 1,500 pesos. The cash was working capital for the purchase of materials and loans to bordadoras (Gabriel 1926:19–22).

The most high-volume cabecillas earned between 500 and 800 pesos per month at their peak, while smaller cabecillas earned roughly half that amount. There were two types of wages for bordadoras: piecework and hourly. The former meant working in a bordadora's home, while hourly wages meant working in the cabecilla's home. In the latter case, the work was done from 7 a.m. to 12 a.m. and from 1 p.m. to 5 p.m., a nine-hour workday, for a daily wage of only 50 centavos. The bordadora's hourly wage was reduced so that she could take more money for herself. In Parañaque, Rizal, it was not uncommon for a cabecilla to live in a magnificent house with expensive furniture and to own a car and a salt bet; these women were often considered wealthy by the locals (Gabriel 1926:19-22).

Casa Central (head Office) - New York, US
|
Casa Sucrusal (branch) - Manila, the Philippines
|
Cabecilla (local agent) - Manila, the Philippines
|
Bordadora (embroiderer) – Manila and Local Provinces

Fig. 2 Global division of labor in the embroidery industry

5. The shoemaking industry

5-1. Shoes as a daily necessity

It was known that the Chinese engaged in shoe-making during the Spanish period, but shoes were a luxury item and a privilege of the wealthy at that time (Mallat 1983:110). It was not until the American colonial period that shoes began to gain popularity among

Filipinos. At that time, the Philippines was rapidly transforming into a mass consumer society, with the influx of consumer goods such as cars, furniture, clothing, drinking water, and stationery. The Philippines could now obtain high-quality imported goods without the need to manufacture goods themselves. In addition, consumer goods from Japan and China, which were tariffed but still inexpensive, also flowed into the Philippine market in large quantities (Hayase 2012). Leather shoes, among many other consumer goods, symbolized American material culture (*Tribune*, January 25, 1931). Shoes were a necessity not only for children in the barrios, but also for civil servants engaged in office work, students, and even factory and port facility workers.

A major challenge for the Philippine economy was that leather shoe manufacturing was either imported or highly dependent on imported raw materials, but it is noteworthy that there were already numerous companies manufacturing leather shoes in the country during the first half of the 20th century. According to the 1903 and 1918 censuses, not only did the number of shoemaking companies nationwide increase from 98 to 138, the industry also penetrated several new provinces (The Government of the Philippine Islands 1921, IV, Part 1: 209). As noted above, the shoemaking industry was originally run for the wealthy by the Chinese, but it expanded rapidly in the American period because many Filipinos started to dominate these jobs. In the 1903 census, Filipinos accounted for only one-quarter of the shoe-making industry, but by the 1939 census, they almost completely controlled it (Doeppers 1984: 54). Shoemaking was the most rapidly Filipinized segment of the indutrial sector.

It is interesting to note that John Carroll, who conducted a survey of entrepreneurs in the manufacturing industry of the Philippines, noted that the shoe industry, and the related leather industry, gave rise to craftsman–entrepreneurs (Carroll 1964:117–124). What they had in common was that the assets that allowed their businesses to grow were the craft skills they had acquired prior to starting their firms. In this sense, owning a repair shop was a valuable career path to later success in manufacturing (Carroll 1964:117). Looking at the shoe industry, as Carroll pointed out, the common thread was that its participants acquired their specific skills by working in repair shops or other related industries.

Let us consider three examples representing companies led by craftsman–entrepreneurs. The Hale Shoe Company, known by the brand name ESCO, was founded by American Frank H. Hale, who entered the market after repairing boots for the U.S. Army (American Historical Collection n.d.; *Tribune*, November 15, 1935). In the 1930s, he established a factory in Paco, Manila that was equipped with state-of-the-art machinery and said to be the largest in the East (*Tribune*, November 13, 1937). In the Philippines, Toribio Teodoro became known as the "footwear king of the Philippines." He was a Filipino who

founded the Ang Tibay shoe brand with a friend, relying on initial capital of 200 pesos. In 1937, he started production in Grace Park, an industrial area in Caloocan, Rizal, just north of Manila (*Tribune*, November 13, 1937)[ix]. In 1933, Tomas Geronimo started the Philippines' first rubber shoe manufacturing plant (El Porvenir Rubber Products), known by the brand name Elpo, in Santa Ana, Manila (Carroll 1964:167; Esquire Philippines October 13, 2017).[x] In Geronimo's case, the company had originally manufactured automobile tires, but switched to shoemaking. For these entrepreneurs, participating in manufacturing without protections against products imported from the U.S. was a great challenge. Moreover, the Chinese controlled an overwhelming share of commerce, including distribution and retail, on the strength of their own networks. Considering that the U.S. and Japan each also had a significant presence, the new areas for possible entry were limited to construction, transportation, and communications, in addition to manufacturing (Doeppers 1984:58).

5-2. Elimination of Japanese rubber-soled shoes from the market

ESCO, Ang Tibay, and Elpo operated large, modern factories based in Manila, but at the same time, around 250 handmade shoe shops were clustered in Marikina, Rizal. These small businesses were responsible for nearly half of the shoes produced in the country (*Tribune*, Jan 25, 1931). Despite the expansion of the shoemaking industry, shoe shortages remained and had to be addressed by imports because the locally produced supply was insufficient for meeting domestic demand. In the 1920s, the potential shoemaking market was estimated at 1.2 million for every 7 million adults in the Philippines (*Tribune*, January 25, 1931). Most of the factories in Manila manufactured leather shoes using imported raw materials such as leather for shoe uppers and rubber for soles. In 1919, for example, the country exported 2,368 pairs of leather shoes and 674 pairs of canvas shoes, worth 20,695 pesos and 3,351 pesos respectively, while in contrast, foreign shoe imports were valued at 5,000,000 pesos (The Chamber of Commerce of the Philippine Islands 1920:202).

There were other reasons why shoe production could not keep up with domestic demand. The biggest problems were the meager supply of leather and the country's immature processing techniques (Boomer 1916:88-91). In 1916, there were 167 tanneries in the Philippines, handling $900,000 worth of leather, which paled in comparison to the value of leather imports ($1,274,802). Since most of the beef consumed in the Philippines was imported, it was necessary to walk the streets in search of hides when they were needed. In addition, in many districts, raw hides were useless, and dry hides were only occasionally exported to Hong Kong and India for glue production. Because of the immaturity of hide preservation techniques, the quality of leather from Philippine tanneries was inferior to that

of imported products (Boomer 1916:88; Santiago 1923:1)[xi]. For these reasons, the Hale Shoe Company used top-quality tanned leather imported from the United States, Italy, Argentina, and Australia (American Historical Collection n.d.).

Under these circumstances, Japanese-made shoes achieved rapid growth in the Philippine market. In particular, the imports of Japanese rubber-soled shoes expanded rapidly, especially around 1930. Not only did the depreciation of the yen make the shoes affordable for Filipinos, they were also sold at a discount of 20 centavos per pair, which allowed them, in 1932, to overtake the United States, which had previously boasted an overwhelming import volume, as the main shoe importer to the Philippines. Inexpensive Japanese goods posed such a threat to the Philippine market that a bill was debated in the national legislature to raise import duties (*Tribune*, October 14, 1931). The tariff was raised from 1932 to 1933, in part because Japanese products were encroaching on the market for American imports, and to protect domestic Philippine industries (Rodriguez 1934: 3, 4, 7). This measure resulted in a tariff of 50 centavos per pair of rubber-soled shoes, double the previous rate, and the share of shoes made in Japan declined rapidly from around 1938 (Hayase 2012:147).

The tariff hike did more than keep Japanese rubber-soled shoes out of the Philippine market; by 1934, the number of factories manufacturing rubber-soled shoes in the Philippines had increased to four, including Elpo. Of these, two were Filipino-owned, and the other two were Japanese-owned. As a result, 1.5 million pairs of rubber-soled shoes could be produced in the country each year. This production volume was equivalent to almost half the amount of rubber-soled shoes imported as of 1933. In short, the increase in tariffs accelerated the production of rubber-soled shoes in the country (Rodriguez 1934:3).

5-3. Development of the Marikina shoe industry

Besides the large, modern shoemaking factories and rubber-soled shoe factories represented by ESCO, Elpo, and even Ang Tibay, the Philippine shoemaking industry was led by small firms that accounted for half of all production. Most were concentrated in Marikina, Rizal. It is difficult to know their exact number, but by 1916 there were about 100 shops, and by 1930, nearly 250 stores were engaged in shoemaking (Estrella 1916:4; *Tribune,* January 25, 1931). How did these shops come to be concentrated in this area? Aurelio Estrela's 1916 report, "The Shoe-making Industry of Marikina" provides a clue. During the American period, Marikina was part of the province of Rizal, which lies around the city of Manila, and was drained by the Marikina River, a branch of the Pasig River. Since the Spanish period, it had served as an important transportation route, but the area was frequently plagued by floods. As a new means of regional development and job

creation that did not depend on agriculture, Manuel Guevera, then mayor of Marikina, turned to shoemaking. It was not until 1887 that he succeeded in actually making leather shoes, after dismantling the shoes he had purchased in Escolta, Manila and making shoe patterns from them. When his shoes were sold in Manila, he found that the price was profitable enough, and shoemaking became widespread among Marikina's residents.

There were two main reasons for the spread of shoemaking in Marikina: first, the income from shoemaking was greater than that of farming, and second, there was a great demand for shoes. In 1916, one factory employed about 20 workers, and the monthly income for each worker was around 70 pesos. For workers, the average weekly incomes of men and women were as high as 10 and 8 pesos, respectively. Factory owners were expected to go to Manila City and Binondo, a Chinese town, every Saturday to sell their goods. Some Marikina residents traveled around the Philippines as peddlers. In the course of these travels, some started shoemaking factories in Rizal, Albay, Tayabas, Pangasinan, Laguna, Bulacan, and Batangas (Estrella 1916: 6). The unique origin and development of the shoemaking industry in Marikina is very different from that of craftsman–entrepreneurs such as Frank Hale and Toribio Teodoro and illustrates the diverse paths of development of the Philippine shoe industry.

Despite the varying paths to success outlined above, there was a commonality among them in that skill acquisition was the key to business success. In the case of Marikina's handmade shoemaking industry, participation in the world of craftsmanship is thought to have led to the acquisition of skills applicable to shoemaking. It is remarkable that these small Marikina shoemaking shops continued to develop after World War II. According to the *Directory of Business Establishments* (Republic of the Philippines, Bureau of Commerce 1958:230-237), there were 754 shoe factories in the Philippines, of which 358, or almost half, were concentrated in Marikina. What does this mean? Since the American period, imported products had been targeted at the wealthy, yet Philippine-made shoes were aimed at the Filipino masses. It was Marikina's shoemaking industry that was able to provide these essential goods to the Filipino people at affordable prices. This is considered one of the major factors that supported the sustainable growth of the industry from the prewar to the postwar periods.

6 Comparing the two industries

Both embroidery and shoemaking were new manufacturing industries that emerged to meet the growing demand at home and abroad. Unlike traditional piña and jusi, embroidery entered the U.S. market as a new, non-traditional commodity. As a result of a new lifestyle changes stimulated by imported American material culture, shoes gained

widespread acceptance in the domestic Philippine market as a necessity of life. In the first half of the 20th century, many manufacturing industries depended on demand for overseas exports, such as sugar factories, alcohol refining plants, and coconut oil processing plants. Embroidery and shoemaking, however, depended on the importation of raw materials such as cotton (as cloth) and leather and were largely dependent on craftspeople. In the case of embroidery, the techniques of weaving and clothmaking were handed down from the pre-Spanish colonial period. Later, the fusion of European-style designs and techniques introduced by the Catholic Church transformed embroidery into a product for the overseas markets. Craft skills were the key to the demand for embroidery in both the domestic and international markets. In the case of shoemaking, securing an apprenticeship through "legitimate peripheral participation" (Lave and Wenger 1991) in a repair shop was a career path to later enter the manufacturing industry, because it was a place to acquire craft skills.

Anthropological findings on Filipino craftsmanship provide invaluable insights into the acquisition and transmission of craft skills. Ushijima (1996) and Ushijima and de la Peña (2000), who investigated the wares of and trading by potters in the Visayas Inland Sea of the Philippines, as well as blacksmithing, pointed out that these skills were usually passed on from the older to the younger members of a family. The important point Ushijima made was that the techniques handed down were not limited to just how to make things; they also included practical knowledge about conducting business, such as when, where, and to whom to sell. Such practical information was applicable to the case of Marikina's shoemaking industry, as it included knowledge about shoe shop owners' trips to the Chinese district of Manila every Saturday and information about hide-peddling around the country. This type of knowledge was required of small manufacturers because they were responsible not only for manufacturing but also for sales.

In light of the above, it is appropriate to define the small-scale shoemaking stores in Marikina that also engaged in manufacturing as family-based enterprises. It is not difficult to imagine that craftspeople who were able to accumulate a certain amount of capital under these circumstances had the potential to grow into entrepreneurs (Carroll 1964:192–193). At the time, one major challenge in the Philippines concerned how to consolidate Marikina's small shoe stores into mechanized modern shoe factories (*The Philippines Herald Year Book*, September 23, 1933). However, the strong sense of independence in each household related to economic activities made it difficult to maintain and larger and more permanent organizations or business enterprises than those operated at the family and household levels.

In the case of the embroidery industry, the passing on of techniques within the family, often from mother to daughter, was valuable. However, the embroidery industry differed from shoemaking in that it was heavily influenced by U.S. colonial rule, which placed an emphasis on the spread of modern public education. At that time, handicraft skills such as basket-, hat-, pottery-, and slipper-making were introduced in the lower grades of elementary school education as “industrial education” to cultivate the awareness of independent citizens and to boost their earning capacity (May 1980:116)[xii]. Hugo Miller, an American educator who worked for the Bureau of Education during the American colonial period, appreciated the role played by industrial education in the Philippines (1913:300). In some provinces, what students learned in industrial education led to the birth of the slipper and shoemaking industries. Training of up to four years during primary education by the Philippine colonial government, specialized in embroidery and lace-making, contributed to the acquisition of specific craft skills (Jones 1921: 409). The result was an increase in exports from the Philippines (Miller 1913:300). In other words, in the Philippines during the first half of the 20th century, skills that could be used in the manufacturing industry could be learned not only in the workplace and family settings, but also through formal schooling. This expansion of educational opportunities was one of the factors that continued to sustain embroidery exports.

What made the embroidery industry so different from the shoemaking industry was that the embroiderers only dealt with local agents. They did not have the opportunity to take a bird's-eye view of the industry as a whole. Specifically, they neither had a network with the market and the outside world beyond production, nor could they have known how their embroidery was distributed, because this information was not needed in the Philippines. This meant that they lacked the opportunity to develop the "industrial and commercial idea" (Miller 1913:298). As Miller pointed out, such ideas were necessary to start an industry. Since workers had no opportunity to learn how to sell their work in the market, their labor was little more than piecework (1913:295). Moreover, only women and children were engaged in this field, and even if they had skills to pass on, so it was difficult for them to develop it into a family business like shoemaking. No matter how profitable the embroidery industry for overseas export was, the purchase of cotton and/or linen cloth and the absence of a domestic market made it difficult for embroiderers to develop economic activities beyond the level of a side business.

7. Conclusion

We have discussed the embroidery and shoemaking industries in the Philippines during the first half of the 20th century to highlight their manufacturing characteristics. The

two industries grew rapidly, due to increasing demand at home and abroad. The shoemaking industry succeeded in expanding production for the domestic market by shutting out Japanese imports, thus laying the foundation for the post-World War II era and leading to the industrialization of the Philippines. The embroidery industry, by contrast, became an important provider of export products, and the industry largely developed to meet overseas demand alongside cash crops. Both industries were shaped by craftsmanship; however, their trajectories were very different. Shoemaking, which had previously been monopolized by the Chinese, became a growth industry during the American period, with Filipinos ultimately dominating. In addition, the Filipino elite had little interest in entering manufacturing for the domestic market, which competed with imports from the U.S. The market opened up by the increased demand for shoes was an arena open to the lower classes. They, in turn, sought to coexist with the upper classes by providing the public with shoes at an affordable price point that did not compete with U.S. imports. Embroidery, however, had great potential as an export commodity to the U.S. For this reason, the industry grew, and the colonial government and the Bureau of Education were poised to support it collectively, in hopes that it would become a major export. However, the work did little more than provide a sideline for women and girls engaged in wage labor.

Structurally, it is interesting to examine the different responses of Philippine manufacturing to free trade with the United States. The creation of a shoe-making industry for the domestic market, although less productive, laid the groundwork for the industrialization of the Philippines in the postwar period. The embroidery industry, by contrast, ended up being similar to sugar and coconuts, in that it produced commodities for export, thus reinforcing the existing colonial economic structure, although it did provide employment opportunities for rural women. The embroidery industry contributed to economic development to a great extent, but failed to foster new industries or to absorb the chronic labor surpluses of urban areas. In the first half of the 20th century, the Philippines promoted policies to extract more benefits from free trade with the United States, but it also increased productivity to add value to exported goods and to create jobs, but it was reluctant to build a new industrial base that would do the same.

Notes

[i] The bus transportation companies established in the 1910s and 1920s are the following: A. L. Ammen Transportation, Co., (ALATCO), 1914; Pangasinan Transportation Co., (PANTRANCO), 1917; Batangas Transportation Co., (BTCO), 1918; Bohol land Transportation, 1923; Cebu Auto Bus, 1926; Laguna-Tayabas Bus Co., 1928; Pampanga

Bus Co., 1928 (Hartendorp 1953: 45-47).

[ii] See more details (Caoili 1987:101-102). It was not until 1936 that industrialization by government-owned corporations in the Philippines started to accelerate, and prior to that, its pace had been inactive.

[iii] Carroll introduces an example of how a son whose father was a shoemaker as a side job while working as a sharecropper became a shoemaker himself and then established his own shoe company after the war. For this son, the capital needed to start his business consisted of the craft skills he had acquired in pre-war shoe factories and the money he had accumulated during the war (Carroll 1964: 77–78).

[iv] In 1846, Frenchman Jean Mallat, who wrote *The Philippines: History, Geography, Customs, Agriculture, Industry and Commerce of the Spanish Colonies in Oceania* (1983), observed that, in Manila, Chinese people made a living making shoes (Mallat 1983: 108, 110).

[v] According to the report "Laces and Lace Articles" published by the Unites States Tariff Commission in 1934, the imports of hand-made lace and lace articles were largely through New York (United States Tariff Commission 1934:272). From 1912 to 1933, China accounted for approximately 70% of total imports of hand-made lace and lace articles, indicating that the U.S. market for Philippine embroidery products had not expanded.

[vi] The idea of establishing the school was inspired by the remarkable achievements in industrial education in European countries such as The Netherlands (The School of Household Industries 1912:60). During the Spanish period, textiles exported from Britain to the Philippines were handled by the Chinese through cabecilla. A “cabecilla” refers to a large wholesaler dealing with the import and export trade, and to agents stationed in each province to sell goods and purchase the crops there (Valdepeñas and Bautista 1977:103–104).

[vii] Interestingly enough, during World War II, Miss Trinidad Tobias was sent from the Philippines to US so as to investigate the requirements of Filipino embroidery products compatible with the U.S. market and to explore the possibility of establishing branches of Manila embroidery enterprises in various American cities. However, this attempt never materialized (Gage 1918:57).

[viii] The reference to cabecilla is found in Valdepeñas and Bautista (1977:103–104). They noted that there were agents in the countryside who oversaw the workers in the provinces. It is unlikely that the Manila-based cabecilla would have directly controlled the embroiderers in rural areas. In the case of the embroidery industry, it is appropriate to assume that there must have been a local agent or intermediary between the cabecilla and the embroiderers.

[ix] Caoli analyzed that Teodoro’s success in shoemaking business before World War II was largely attributed to getting a contract to supply the newly-established Philippine Army with

his shoes (1987:86).

[x] According to Carroll (1964:167), the first rubber shoe manufacturing plant in the Philippines was able to expand with the help of Japanese engineers.

[xi] It should be noted that unlike the figure provided Boomer (1916:88), the 1918 census lists only 59 tanneries, 28 of which were concentrated in Bulacan. For more details of tanning industry of Bulacan, see Santiago (1923).

[xii] The shift from literacy education to industrial education started from December 1909, when the head of the Bureau of Education was changed to David Barrows to Frank R. White (May 1980:116-124). This policy aimed to make the Filipino reproductive labor. To this end, the Bureau organized the department to promote and supervise all industrial instruction to the subjects such as bamboo and rattan work, basketry, embroidery, gardening, hat-making, lace-making, loom weaving, pottery, and wood working. It also began to publish a monthly journal, *The Philippine Craftsman*, to disseminate the progress and achievement of Philippine industrial. Consequently, the ratio who engaged in the industrial work at the primary school level (Grade 1-4), in 1911, 1912, and 1912, surged to 90%, 92% and 94% respectively, out of the total enrolled primary school students (May 1980:118). For more details on *the Philippine Craftsman*, see Lo (2022:241-257).

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Table 1　Number of embroidery and shoemaking enterprises (as of 1918）

	Embroidery	Piña production	Jusi production	Textile factories	Shoemaking	Slipper-making	Tannery
Total number of firms (number in 1903)	115（—）	3(7)	24（34）	96（—）	138（98）	198(80)	59(30)
Number of workers (male/female)	2,057 (132/1,925)	30 (0/30)	572 (408/164)	790 (123/667)	1,079 (924/155)	1,368 (1,135/233)	284 (244/40)
Distribution of firms by province (number)	Rizal (58) Cebu (19) Manila (11) Laguna (10) Abra (3) Batangas (3) Lepanto-Ambulayan sub-province (3) Other provinces (8)	Capiz (3)	Iloilo (24)	Ilocos Sur (66) Batangas (3) Bulacan (17) Cebu (6) Other provinces (4)	Manila (41) Rizal (28) Pampanga (14) Ilocos Sur (10) Pangasinan(7) Abra (6) Iloilo (6) Capiz (3) Ilocos Norte (3) Tayabas (3) Other provinces (17)	Manila (92) Rizal (20) Bulacan (17) Laguna (17) Batangas (8) Albay (7) Ambos-Camarines (6) Iloilo (5) Pangasinan (3) Sorsogon (3) Cavite (3) Tayabas (3) Cebu (3) Other provinces (17)	Bulacan (28) Ilocos Sur (10) Manila (9) Iloilo (4) Cebu (3) Other provinces (5)

Source: The Government of the Philippine Islands (1921:199–419)

Table 2. Number of workers engaged in embroidery, lace-making, shoemaking, and slipper-making as a household industry (as of 1918）

	Embroidery-making	Lace-making	Shoemaking	Slipper making
Number of households engaged	2,360	56	93	265
Number of people (male/female）	2,925(25/2,900)	76(0/76)	154(136/18)	604(418/186)
Distribution by province (number)	Rizal (507) Cebu (163) Batangas (143) Laguna (125) Albay (104) Leyte (77) Ambos Camarines (52) Ilocos Norte (42) Ilocos Sur (19) Nueva Ecija (19) Bohol (39) Tayabas (37) Samar (36) Negros Occidental (35) Pangasinan (29) Sorsogon (15) Abra 814) Zambales (14)	Batangas (36) Abra (3) Bohol (3) Romblon (3) Other provinces (11)	Cagayan (3) Cebu (10) Ilocos Norte (6) Ilocos Sur (4) Iloilo (4) Laguna (4) Leyte (4) Masbate sub-province (18) Negros Occidental (4) Pangasinan (4) Tayabas (4) Other provinces (21)	Pangasinan (29) Pampanga (28) Cebu (27) Ilocos Norte (21) Bulacan (25) Nueva Ecija (25) Batanagas (19) Rizal (13) Ambro Camarines (10) Manila (10) Laguna (8) Tayabas (7) Sorsogon (5) Cagayan (5) Abra (4) Capiz (4) Iloilo (4) Ilocos Sur (3)

	Tarlac (13) Catanduanes sub-province (12) Bataan (8) Iloilo (8) Isabela (7) Siquijor (7) Capiz (7) Cavite (6) Antique (6) Pampanga (4) La Union (3) Zamboanga (3) Surigao (3) Misamis (3) Other provinces (7)			Other provinces (18)

Source: The Government of the Philippine Islands（1921:577–733）

Table 3. Number of firms engaged in embroidery, shoemaking, and slipper making (as of 1940)

	Embroidery	Piña production	Jusi production	Sinamay production	Shoemaking	Rubber soled shoemaking	Slipper-making	Abaca slipper making
Number of firms	94	22	15	11	53	1	69	22
Distribution of firms by province (number)	Manila (39) Bulacan (15) Cebu (9) Iloilo (7) Ilocos Sur (7) Tayabas (5) Pampanga (4) Batangas (4) Albay (3) Laguna (1)	Camarines Sur (22) Manila (12) Iloilo (4) Capiz (2) Rizal (1)	Manila (6) Rizal (4) Iloilo (4) Capiz (1)	Manila (5) Albay (2) Rizal (2) Sorsogon (1) Iloilo (1)	Manila (30) Cebu (9) Pangasinan (4) Rizal (3) Laguna (2) Tayabas (2) Camarines Sur (2)	Manila (1)	Manila (54) Cebu (6) Rizal (3) Iloilo (2) Cavite (1) Bulacan (1) Pangasinan (1) Pampanga (1)	Manila (8) Albay (5) Camarines Sur (3) Iloilo (3) Capiz (2) Sorsogon (1)

Source: Commonwealth of the Philippines（1940）

Table 4. Exports of embroidered cotton and linen from the Philippines (1913–1932)

Year	Export value (pesos)
1913	352,338
1914	176,912
1915	735,301
1916	2,328,014
1917	3,929,318
1918	4,319,501
1919	6,913,004
1920	15,623,567
1921	10,696,207
1922	6,514,597
1923	12,746,529
1924	9,377,943
1925	9,122,961
1926	11,984,778
1927	8,006,952
1928	9,047,936
1929	12,023,065
1930	7,183,473
1931	5,314,259
1932	6,699,649

Source: Waddington（1920:178), *The Philippine Herald Year Book* (1933:72)