

THE DIRECTOR OF CENTRAL INTELLIGENCE

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25X1

Subject : Rhodesia: Economic Aspects of White Resettlement

The attached memorandum was prepared by the Assistant NIO for Economics with contributions from CIA's Office of Economic Research. Although it has not been formally coordinated within the Agency, you may find this informal paper of interest.

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Attachment

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## RHODESIA: ECONOMIC ASPECTS OF WHITE RESETTLEMENT

Principal Conclusions

-- Rhodesia's white "European" population now totals 277,000, or roughly 5 percent of the African population. Almost 60 percent of the whites are immigrants, who arrived largely from South Africa and the UK in the post-World War II period.

-- Agriculture, mining, and manufacturing form the basis of Rhodesia's highly developed, largely urban, economy. About half of the population is actively engaged in the economy as wage earners. The net value of white-owned property and other wealth in Rhodesia is roughly estimated at \$8-9 billion as follows:

Agriculture	\$4.0 - 4.5 billion
Private Capital,	2.5 - 3.0 billion
of which private	
foreign investment	0.5 billion
Urban Residential	1.5 billion
Property	

-- Recent evidence indicates that the stepped-up guerrilla warfare and mounting uncertainty is affecting the young, middle-class moderates, who are beginning

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to leave the country. The Rhodesian government announced a net loss of 1,520 Europeans from January to May of this year. This outflow might have started earlier had not an influx of less skilled white workers from Angola and Mozambique occurred last year and if stringent foreign exchange controls had been relaxed to allow potential emigres to transfer funds abroad.

-- If forced to leave their home country, most white Rhodesians would choose to resettle in South Africa. About 45 percent of the 70,000 whites leaving Rhodesia in the past ten years moved to South Africa. Besides being geographically adjacent, South Africa is nearest in climate, topography, economic standards and social customs. And the Pretoria government would welcome more white immigrants: the recent annual immigration of about 25,000 is short of the government's goal of 30,000 per year.

-- Other countries with economic or social characteristics similar to Rhodesia and possessing sizable immigration quotas are Canada (201,332), Australia (113,163), New Zealand (32,393), the UK (183,800) and the United States (394,861). It appears economically feasible for these countries and South Africa to resettle a large percentage of the white Rhodesian population on an emergency basis, provided a coordinated plan to do so was in place.

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Discussion

A Nation of Immigrants

1. Rhodesia has been settled by whites since 1890; however, most of the growth of its white "European" population, which now totals 277,000, has occurred in the post-World War II period.\* According to the 1969 Rhodesian census, the latest official census of 228,000 Europeans in Rhodesia at that time, 41 percent were natural-born Rhodesian and 59 percent were immigrants. In the latter category, Rhodesians born in South Africa and the UK account for the bulk of the immigrants, around 50,000 from each country..

Table 1

Rhodesia: Contribution of Immigration to White Population Growth, 1969

<u>Country of Birth</u>	<u>Total</u>	<u>Percent of Total</u>
Rhodesia (natural)	92,934	41
Immigration, of	135,362	59
which:		
South Africa	49,585	22
United Kingdom	52,463	23
TOTAL	228,296	100

2. However, ties of kith and kin to Britain are not as all-embracing as these figures suggest, as many of the persons born in Britain moved into Rhodesia

\* Principal ethnic groups in Rhodesia are Europeans, all members of the Caucasian race (228,296); Asians, primarily Indians (8,965); Colored, primarily descendants of mixed (black-white) parentage but including all persons not otherwise classified (15,153); Africans, descendants of any aboriginal group (6,000,000).

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after staying a considerable period in South Africa. Almost one third of the European population held non-Rhodesian citizenship or dual citizenship with the UK or South Africa, according to the 1969 census. Thus on grounds of origin of immigration, Rhodesia's ties to South Africa are stronger than to the UK or any other country (see Table 2 on next page).

Population Structure

3. The age and sex structure of the European population differs markedly from developed countries, being more typical of a newly established population in which the more prominent demographic characteristics of a pioneer society have been eradicated. On the whole, the sexes are balanced fairly evenly, although the excess of males is more pronounced in the 15-44 years age group than in any other. The population is youthful, and children under 15 years of age comprise almost one third of the total -- a fact which underlies the importance attached to educational and health services. On the other hand, retired and aged persons form only a small portion of the total, and the burden of such dependents within Rhodesia is very light (see Table 3).

Table 3

Rhodesia: Age Structure of the European  
Population: 1969 Census

<u>Age-Group (years)</u>	<u>Percent of Total</u>
0 - 14	29
15 - 44	43
45 - 59	18
Over 60	10

4. As might be expected of such a vigorous population in a country where virtually all skilled and much semi-skilled work has been reserved almost exclusively for Europeans, the proportion of economically active and gainfully employed persons is very high, and a large

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Table 2

Rhodesia: European Citizenship: 1969 Census

Rhodesia	157,649	
Rhodesia and South Africa	3,368	
Rhodesia and UK and Colonies	12,655	
Rhodesia and other Citizenships	1,497	
<u>Total Rhodesia</u>		175,169
South Africa	15,941	
Other Africa	1,353	
<u>Total Africa</u>		192,463
<u>Total North America</u>		1,391
<u>Total South America</u>		18
<u>Total Asia</u>		201
United Kingdom and Colonies	23,466	
Portugal	3,273	
Italy	1,365	
Netherlands	1,109	
Other Europe	3,647	
<u>Total Europe</u>		32,860
<u>Total Oceania</u>		460
All Other		<u>903</u>
GRAND TOTAL		228,296

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number of white women undertake paid employment. Census data show that in 1969 there were 102,741 European employees in the country and that 34,206 (33 percent) of them were women. These figures indicate that 45 percent of all Europeans were at work for wages in 1969. In addition to these employees, there are approximately 15,000 farm families occupied on their own account, and it seems probable that about 50 percent of the European population is economically active and obtains a cash income.

#### Population Distribution

5. The entire European population is involved in the money economy, and since the early years of the century most of the Europeans have been townsmen. According to the 1969 census the urban population comprised 83 percent of the total. The eleven large towns accommodated 79 percent of all Europeans and indeed, 64 percent lived in the two large cities as shown in the following table:

Table 4

#### Rhodesia: European Population of the Large Towns

<u>Town</u>	<u>1969</u>
Salisbury	96,420
Bulawayo	50,830
Umtali	8,340
Gwelo	8,330
Que Que	3,160
Fort Victoria	2,530
Gatooma	1,880
Wankie	2,400
Shabani	1,900
Marandellas	1,800
Redcliff	1,700
TOTAL	179,290

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The population of the 35 small towns, shown as clusters of dots (see map), for the most part, are places associated with either mining townships or administrative and service centers which are closely integrated with their surrounding rural areas. The largest area with a dense rural and small-town population is concentrated along a line from Kariba via Salisbury to Umtali. Except in the vicinity of the capital, areas bordering the axis along the highveld are less densely settled than most other parts of the country. Beyond these two broad belts, European population is sparse.

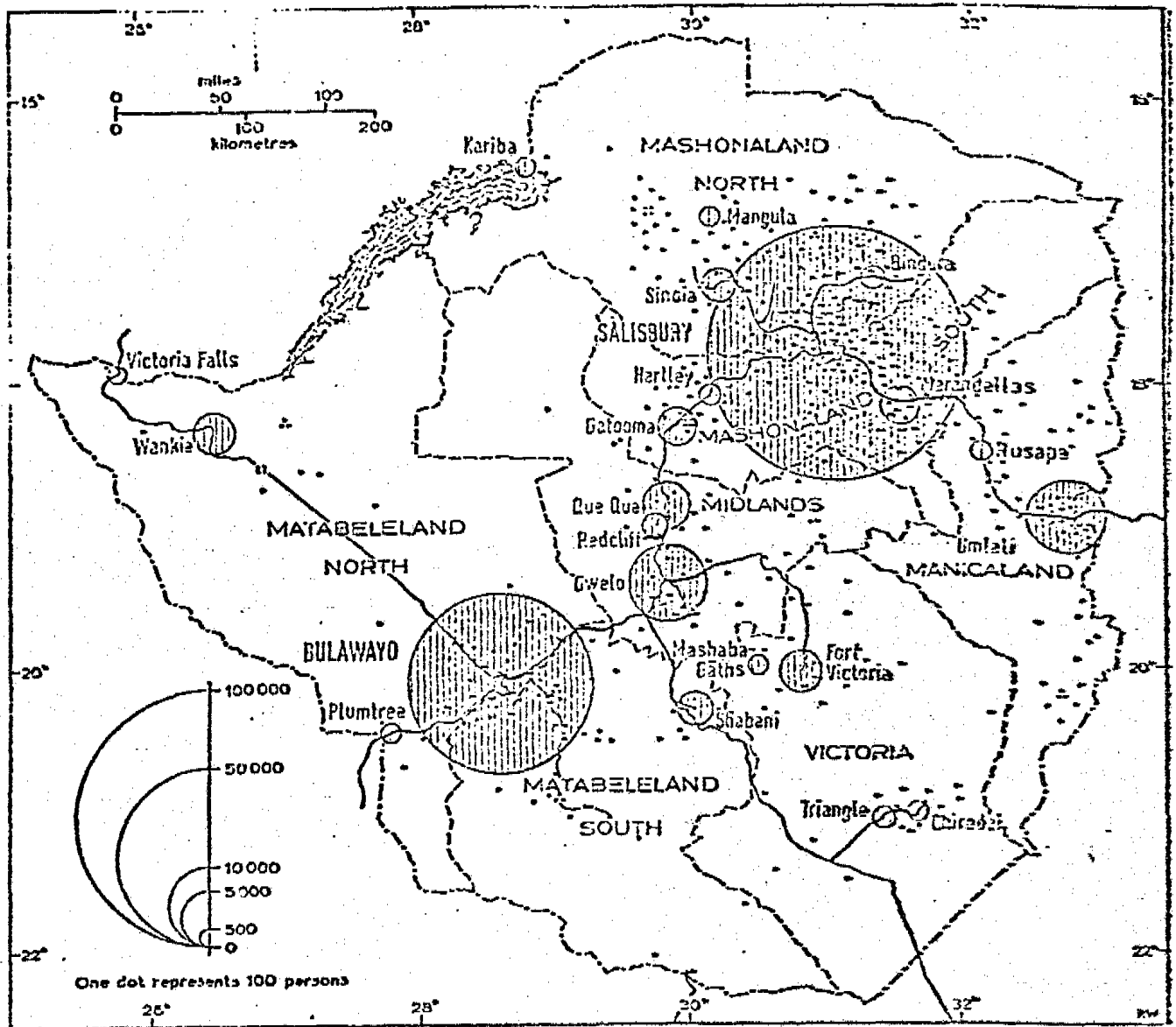
### European Employment Trends

6. Agriculture, mining, and manufacturing form the tripartite basis of Rhodesia's highly developed economy and along with a wide variety of service functions constitute the leading contributions to the Gross Domestic Product. Non-farm white workers in Rhodesia, about four fifths of the total work force, are employed in skilled and professional positions or as proprietors of private businesses. Some 40 percent work in mining, manufacturing, construction, and transport. An additional 31 percent are in government, education, and health services, and the remainder work in finance, real estate, public utilities, and other commercial or agricultural enterprises (see Table 5).

### Mining

7. The major revenue producing minerals are asbestos, chromite, coal, copper, gold, and nickel, although over 40 different kinds of minerals including iron, tin, phosphates and lithium are also produced. Information on the quantity of Rhodesian exports has not been available since the Unilateral Declaration of Independence in 1965. However, the US Bureau of Mines estimated that the value of mineral exports was close to \$270 million in 1974, over 90 percent of the total value of Rhodesia's 1974 mineral production. Chromite, ferrochromium, copper, nickel, gold, and asbestos are the main exported minerals (see Table 6).





European population, 1969.

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Table 5

Rhodesia: European, Asian, and Colored Employees  
by Industrial Sector - 1975

<u>Sector</u>		<u>Percent of Total*</u>
Agriculture and Forestry	4,850	4
Mining and Quarrying	3,820	3
Manufacturing	23,910	20
Electricity and Water	1,820	2
Construction	7,840	7
Finance, Insurance, and Real Estate	9,080	8
Distribution, Restaurants, and Hotels	20,180	17
Transport and Communications	11,380	10
Services, of which:	36,800	31
Public Administration	13,480	11
Education	7,370	6
Health	4,420	4
Other	11,530	10
<b>TOTAL</b>	<b>119,680</b>	

\* Totals do not add due to rounding.

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Table 6

Rhodesia: Role in World Mineral Supply\*  
(thousand metric tons, unless otherwise specified)

Major Commodities	1974 Production	Estimated Share of Production Exported (Percent)	Share of World Output (Percent)	Reserves	Share of Total World Resources (Percent)
Asbestos	150	90	4	5,000	10
Chromite	650	95	9	560,000	20
Coal	3,100	45	(1)	2,000,000	(1)
Copper	41	90	1	600	(1)
Gold (thousand troy ounce)	800	95	2	20,000	(1)
Nickel	18	95	2	700	(1)

(1) Less than 1 percent.

\* Source: US Bureau of Mines, Department of the Interior, 1976, UNC.

8. Rhodesia's mining industry is comprised of numerous small private companies and subsidiaries of a few large corporations, most of which are incorporated outside of the country. Since 1967, however, mineral operations have been under the control of the Rhodesian government through the Ministry of Mines.

### Manufacturing

9. Rhodesian industrial development depends very heavily upon the small entrepreneur and petty capitalist and, in contrast to the situation in most highly industrialized countries (and in contrast to modern Rhodesian mining), small establishments contribute a major part of the industrial output. For example, whereas the eight largest mines in Rhodesia account for about two thirds of the mineral production, the seven largest manufacturing firms produce only 14 percent of the total industrial output (see Table 7).

Table 7

### Rhodesia: Manufacturing Establishments, Employment and Net Output, 1965

<u>Number of Employees</u>	<u>Number of Firms</u>	<u>Percent of Employees</u>	<u>Percent of Net Output</u>
1 - 50	696	14	14
51 - 100	145	12	11
101 - 200	97	16	15
201 - 300	37	11	10
301 - 400	25	10	11
401 - 500	14	7	10
501 - 1,000	21	16	16
Over 1,000	7	14	14
<b>Total</b>	<b>1,042</b>	<b>(85,352 total employees)</b>	

The composition of Rhodesian industry (excluding African small-scale rural and urban domestic industries) is shown in the following table:

Table 8

Rhodesia: Aspects of Manufacturing Industry

Category (by products)	<u>No.</u>	<u>Percent</u>	<u>Percent of Net Output</u>	<u>Percent of Total Employees</u>
Food products	77	7.4	12.0	10.5
Bakery products	53	5.1	2.1	3.3
Alcoholic and soft drinks	29	2.8	5.6	2.8
Tobacco	13	1.2	6.9	7.3
Textiles	32	3.1	6.0	9.1
Clothing and other made-up textiles	133	12.8	7.4	12.6
Sawmills and wood products	47	4.5	2.3	5.5
Furniture and fixtures	56	5.4	2.2	3.3
Pulp and paper	13	1.2	2.8	2.0
Printing and publishing	66	6.4	4.5	3.1
Chemicals	65	6.3	14.0	6.7
Non-metallic mineral products	50	4.8	3.7	4.2
Basic metals	21	2.0	7.5	5.9
Metal products	136	13.0	7.0	8.2
Machinery and all engineering products	89	8.5	4.3	4.2
Transport equipment	29	2.8	7.3	6.7
Repair of motor vehicles	86	8.2	2.2	2.4
Other industries	47	4.5	2.2	2.2
<b>Totals</b>	<b>1,042</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

### European Farming

10. The Rhodesian farming population comprises about 15,000 families who are chiefly engaged in large-scale, capital intensive commercial farming. By comparison with the tribal areas, the European farming lands are lightly settled, and there is no serious widespread pressure of population on natural resources. The average farm size is over 5,000 acres as shown in Table 9.

11. The two main crops in Rhodesia are corn and Virginia tobacco which in 1965 occupied 39 percent and 19 percent respectively of the total cropland. The effects of sanctions on tobacco farming have been severe, however, and production has been declining. Most other cropland is devoted to the production of fodder. Cash crops other than tobacco and corn are largely associated with particular localities and include fruits, tea, coffee, sugar-cane, vegetables, wheat, rice and cotton. Beef cattle are the most numerous large stock on European farms, along with lesser numbers of dairy cattle, sheep, hogs, horses, donkeys, and goats.

### Estimated Wealth of the White Population

12. The net value of white-owned property and other wealth in Rhodesia has been roughly estimated by CIA's Office of Economic Research as about \$8.0-9.0 billion, excluding personal property. Hard data on Rhodesian wealth is not available, and to compile the estimate, the following consecutive steps were taken for each sector:

Agriculture - \$4.0-4.5 billion

-- White farmers and ranchers own about 35 million acres of Rhodesia's most productive land.

-- We estimate the average value at about \$100 an acre. (In Kenya 1.3 million acres were

Table 9

Rhodesia: European Farming - Selected Provincial Statistics, 1965

	<u>Matabeleland</u>	<u>Victoria</u>	<u>Midlands</u>	<u>Mashona-land North</u>	<u>Mashona-land South</u>	<u>Manicaland</u>	<u>RHODESIA</u>
Average size of farm (acres)	11,300	16,700	5,900	3,050	3,870	3,440	5,390
Acres of farmland per (a) European worker	12,700	15,600	6,120	1,890	2,020	2,720	4,230
(b) African worker	702	720	418	61	79	96	156
(c) tractor	9,500	11,300	4,200	950	1,040	1,380	2,310
Percentage distribution of:							
Farmland	32.0	15.9	15.1	14.7	13.8	8.5	100
Cropland	5.4	4.3	8.6	38.4	34.3	9.0	100
Farms	15.0	5.0	13.6	25.7	27.6	13.1	100
European workers	10.7	4.3	10.4	32.5	29.0	13.1	100
African workers	7.5	3.6	5.9	39.9	28.6	14.5	100

purchased to transfer to blacks during 1960-1971 at an average cost of \$43 an acre.)

- \$100 x 35 million = \$3.5 billion in land.
- Whites own about 2.6 million cattle, 230,000 sheep, 97,000 hogs, and about 40,000 horses, donkeys, and goats. At current market values in the US, these livestock are worth about \$0.8 billion.

Private Capital - \$2.5-3.0 billion

- Gross operating profit or privately owned companies, excluding financial institutions, totaled about \$800 million in 1974.
- We estimate the rate of return on capital in Rhodesia at about 12 percent.
- We estimate depreciation at about 50 percent. (This is somewhat higher than the corresponding percentage in the United States. Because of trade sanctions, Rhodesian concerns have tended to utilize equipment and machinery longer than in other countries.)
- We estimate the value of private foreign investment in Rhodesia at about \$0.5 billion.

$$\frac{\$800 \text{ million}}{.12} \times .50 - \$0.5 \text{ billion} = \$2.8 \text{ billion.}$$

Urban Residential Property - \$1.5 billion

- About 75 percent, or 210,000 persons, of Rhodesia's white population live in urban areas. This represents roughly 70,000 households.
- The value of 1975 of urban property transactions in Rhodesia, including business and speculative property, averaged about \$29,000



per transaction. Residential property probably sold for less than average. We estimate the average value at about \$21,000 per unit.

$\$21,000 \times 70,000 = \$1.5 \text{ billion.}$

### White Resettlement Prospects

13. There is no yardstick in recent African history to measure white resolve to avoid black majority rule. Rhodesia is different from other states that have experienced African independence movements in that there is no metropolitan or colonial power to effect governmental transfer to black majority rule. Rhodesians have brooked little interference in their domestic affairs since being granted self-government in 1923 and have had effective independence since 1965.

14. There is evidence accumulating in recent press reports, however, that the stepped-up guerrilla warfare and the mounting uncertainty of the current situation has already affected the young, middle-class moderates who are beginning to leave. The Rhodesian government announced a net loss of 1,520 Europeans in January to May of this year, compared with a gain last year. The outflow might have started earlier except for the influx of European laborers from Mozambique and Angola that occurred last year. Emigration also would probably be much larger if stringent foreign exchange controls were relaxed, thus allowing potential emigres to transfer funds abroad.

15. Commonwealth countries that could accommodate sizable white immigrants from Rhodesia include Canada, Australia, and New Zealand. Average annual immigration to these three countries and South Africa in 1973-74 totaled over 370,000, as shown in Table 10.

Table 10

#### Average Annual Immigration, 1973 - 1974

Canada	201,332
Australia	113,163
New Zealand	32,393
South Africa	<u>25,000</u>
TOTAL	371,888

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It would appear economically feasible for these four countries and possibly including the US (immigration in 1974 totaled 394,861) and the UK (immigration of Commonwealth citizens in 1974 totaled 122,200, plus 61,600 aliens) to resettle a large percentage of the white Rhodesian population on an emergency basis, provided a coordinated political plan to do so was in place.

### South Africa

16. If forced to leave their home country, most white Rhodesians probably would choose to resettle in South Africa. About 45 percent of the 70,000 whites leaving Rhodesia in the past ten years moved to South Africa. Besides being geographically adjacent, South Africa is nearest in climate, topography, economic standards, and social customs.

17. South Africa actively recruits white immigrants both to try to achieve parity with the growth of the black majority and to acquire skilled manpower. Pretoria also needs this inflow in order to maintain its restrictions against blacks entering skilled and managerial positions while meeting its economic growth goals. Net immigration during 1971-74 averaged 25,000 persons a year, falling short of the government's 30,000 target. In 1975, net immigration jumped to about 37,000, reflecting the civil war in Angola and the economic recession in the UK and other European countries.

18. Most Rhodesian whites would have little trouble finding employment in South Africa. Non-farm white workers in Rhodesia, about four fifths of the total work force, are employed mainly in skilled and professional positions or as proprietors of private businesses. The farming population probably would be among the most reluctant to leave Rhodesia and would face the greatest difficulties in getting a new start. Most are natives and have strong feelings about maintaining roots in their homeland. The majority, moreover, would have to change occupations because comparable farmland is not readily available in either South Africa

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or other possible destinations. Although equally reluctant to move, businessmen with economic stakes in Rhodesia would be able to get back into business more readily in another country than farmers.

19. Most Rhodesians probably would be more attracted to South Africa than to alternative countries. The whites already are conditioned to the laws and customs designed to ensure their political and economic control. Many of the factors, moreover, that attracted UK immigrants to Rhodesia -- higher wages, better climates and amenities, and less class discrimination among whites -- also exist in South Africa.

#### Canada

20. Canada's immigration policy aims at stimulating controlled growth by admitting immigrants who can contribute to the economic, social, and cultural development of the country, or who are related to a Canadian resident. Selection criteria, applied without reference to race, color, or geographic origin of applicants are:

- age
- motivation/adaptability
- education/training
- knowledge of English and/or French
- occupational skill
- current Canadian demand for the applicant's occupational skill
- general employment prospects in the area to which the applicant desires to immigrate
- availability of pre-arranged employment
- presence of a relative wishing to assist in establishing the immigrant.

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21. A new immigration law is expected by the end of this year. Under a blueprint for change drafted by government officials, an adjustable annual ceiling on the number of immigrants would be set for the first time. The plan calls for ceilings to be calculated on the basis of such factors as the level of economic activity, unemployment rates, participation rates, and Canadian population trends. Formal education would be downgraded, and more emphasis would be placed on job skills and experience. The proposal also provides special consideration for entrants who take their skills to areas in Canada where they are in short supply. Tables 11, 12, and 13 show Canada's demographics.

Table 11

Canada: Migration - Employment Trends  
(in 000's)

Year	Population	Immigration		Emigration	Labor Force	Employed	Unemployed
		Total	To Labor Force				
1970	21,297	148	78	78	8,400	7,919	481
1971	21,569	122	61	66	8,624	8,107	517
1972	21,820	122	59	47	8,920	8,363	557
1973	22,095	184	92	44	9,322	8,802	520
1974	22,446	218	106	45	9,706	9,185	521
1975	22,800	206	90	40	10,060	9,363	597
		(est)		(est)			

Australia

22. Australian restrictions on immigration are being relaxed as the economy improves. Canberra plans to increase the immigrant quota to 70,000 next year compared to 50,000 this year. A deterioration in employment conditions prompted the Labor government to cut back sharply in immigration in the past

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Table 12

Canada: Population by Area  
(in 000's)

	<u>1961</u>	<u>1975 (est)</u>
Rural	5,170	4,993
Percent	30.4	21.7
Urban	12,700	17,807
Percent	69.6	78.1

Table 13

Canada: Employment by Industry, 1975

<u>Industry</u>	<u>Number Employed</u> (in 000's)	<u>Percent of Total</u>
Goods Producing	3,282	35.1
Agriculture	482	5.1
Other Primary	228	2.4
Forestry	72	0.8
Fishing/Trapping	23	0.2
Mines	133	1.4
Manufacturing	1,963	20.9
Construction	609	6.5
Service Producing	6,081	64.9
Transport/Communication/Utilities	811	8.7
Transport/Communication	706	7.6
Utilities	105	1.1
Trade	1,643	17.5
Finance	463	4.9
Community Business	2,522	26.9
Public Administration	642	6.9
TOTAL	9,363	100.0

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several years. As economic conditions improve, Australia will continue to take a more favorable position on immigration, although it will not return to the relative open door policy that existed prior to 1971. Tables 14 and 15 show trends in recent years.

Table 14

Australia: Population Trends

<u>Year (30 June)</u>	<u>Total Population</u> <u>(in 000's)</u>
1970	12,507
1971	12,756
1972	12,959
1973	13,132
1974	13,338
1975	13,507
Distribution (1971 Census)	
Urban	86 percent
Rural	14 percent

Table 15

Australia: Migration Trends

<u>Calendar Year</u>	<u>Immigration</u>	<u>Emigration</u>
1970	185,325	37,294
1971	155,525	41,122
1972	112,468	45,881
1973	105,003	43,430
1974	121,324	33,751
January-April 1975	17,936	10,708

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New Zealand

23. Because of its small size, New Zealand probably could absorb few Rhodesian emigrants; however, the similarity of the two economies and population structure make New Zealand a distinct resettlement possibility as shown in Table 16. The distribution of New Zealand's labor force is shown in Table 17 (on following page).

Table 16

New Zealand: Migration Trends

<u>Year Ended</u> <u>31 March</u>	<u>Immigration</u>	<u>Emigration</u>	<u>Net</u>
1971	17,735	11,234	6,501
1972	20,261	9,339	10,922
1973	26,666	7,818	18,848
1974	38,121	9,591	28,530
1975	34,142	9,050	25,092
April- November 1975	13,470	4,386	9,084

United Kingdom

24. Although Britain is currently experiencing difficulties with recent immigrants from India and Pakistan, the problems are basically of a racial rather than economic nature. Despite its current economic problems, Britain would be unlikely to turn away white Rhodesian immigrants, particularly if receiving them would lead to a more orderly transfer of power to black majority rule. It is doubtful, however, that many Rhodesians would want to settle in Britain. Table 18 shows the pattern of migration into and out of Britain during the past decade.

Table 17.

New Zealand: Employment of Labor Force  
(April 1975)

	<u>Number Employed</u> (in 000's)	<u>Percent of Total</u>
Agriculture	141.5	11.7
Mining	4.5	0.4
Manufacturing	294.9	24.4
of which		
Food	70.1	5.8
Textiles	47.3	3.9
Wood	24.4	2.0
Paper	29.3	2.4
Construction	94.7	7.8
Service	658.0	54.5
of which		
Wholesale and Retail Trade	194.1	16.1
Transportation	110.6	9.2
Community and Social Services	261.7	21.7
Armed Forces, Unemployed	14.1	1.2
TOTAL	1,207.7	100



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Table 18

United Kingdom: Immigration and Emigration, 1965-1974

Thousands	<u>1965</u>	<u>1970</u>	<u>1974</u>
<u>IMMIGRATION</u>			
a. Commonwealth Citizens	140.0	155.2	122.2
b. Aliens	66.3	70.4	61.6
c. Total	206.3	225.6	183.8
<u>EMIGRATION</u>			
a. Commonwealth Citizens	250.6	247.9	228.3
b. Aliens	33.7	42.8	40.7
c. Total	284.3	290.7	269.0
<u>NET EMIGRATION</u>	78.0	65.1	85.2

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