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Double Trouble? Meeting the Export Target for Asia-Pacific Least Developed Countries in the 2030 Agenda for Sustainable Development

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Highlights

The 2030 Agenda for Sustainable Development sets forth seventeen goals (known as the Sustainable Development Goals or SDGs) which will define global development priorities for the next fifteen years. The importance of trade as an engine of growth is recognised in a number of targets, most notably within Goal 17 on partnerships for the goals and the means of implementation. This goal sets, among other objectives, a target for least developed countries to double their share of global exports by 2020. The prospects for Asia-Pacific least developed countries (LDCs) meeting this goal are assessed in this note. Key findings are that:

- Most Asia-Pacific LDCs achieved reasonably strong GDP growth in recent years and are expected to expand by an average of 5.8 per cent in 2016. Exports from regional LDCs have also grown rapidly in recent years, with average aggregate export growth of 15 per cent between 2010 and 2014. In 2014, regional LDCs had exports worth $57.4 billion and accounted for 0.3 per cent of global exports up from 0.24 per cent in 2010, an increase of 25 per cent.
- If global exports grow annually by 3 per cent from 2015 to 2020, Asia-Pacific LDCs as a group would need to achieve export growth of 11.4 per cent a year over that period to meet the target of doubling their global export share from a 2010 baseline.
- The difficulties that individual LDCs face in meeting the target differ greatly. For instance, Cambodia would double its share of global exports compared with 2010, if it can grow exports by 6 per cent a year from 2015 to 2020. Nepal, in contrast would need expansion at the average rate of 19 per cent.
- Other countries can support LDC exports by: expanding duty-free market access; providing simpler preferential rules of origin with better cumulation provisions; tackling non-tariff and behind the border barriers; granting meaningful preferences to LDC service exports; and supporting the expansion of Aid for Trade assistance.
- LDCs themselves can use national SDG strategies to integrate trade policy into their wider development plans. This should involve thinking beyond the goals of export expansion to include targets on trade cost reductions and trade facilitation. They can consider also setting longer-term goals going beyond the expiry of the export target in 2020.

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Trade and the Sustainable Development Goals

Following its endorsement at an unprecedented gathering of global leaders in September 2015 in the United Nations headquarters, the 2030 Agenda for Sustainable Development came into effect on 1 January 2016. The Sustainable Development Goals (SDGs) represent an ambitious and transformative global development agenda: they have been conceived to be a "comprehensive, far-reaching and people-centred set of universal and transformative Goals and targets" which will commit countries to achieving "sustainable development in its three dimensions – economic, social and environmental – in a balanced and integrated manner" ((United Nations, 2015). Most ambitiously, the SDGs call for an "end to poverty and hunger everywhere" and also commit nations to goals on inequality, health, education and gender among other areas. There are a total of 17 SDGs accompanied by 169 targets. Specific indicators for the goals and targets are in the process of development by the Inter-Agency and Expert Group on SDG indicators and are expected to be agreed by the UN Statistical Commission (UNSC) in March 2016.

International trade is accorded prominence across the 2030 agenda for sustainable development (as the SDGs are also known) being explicitly recognized as an 'engine for development.' Several individual goals directly address trade-related policies: SDG 2 on hunger and food security calls for elimination of agricultural market distortions; SDG 3 on health mentions Trade-Related Intellectual Property (TRIPS) in the context of access to medicines; SDG 8 on economic growth calls for an increase in Aid for Trade spending targeted to least developed countries (LDCs); and SDG 10 on inequalities notes the need to implement the principle of special and differential treatment for developing countries in the World Trade Organization (WTO). Trade features, however, most extensively in SDG 17 which is an overarching goal covering global partnerships and means of implementation. This goal covers systemic areas expected to help achieve the goals as a whole, namely finance, technology and trade. Specifically, the trade section of SDG 17 contains three aims:

- The promotion of a universal, rules-based, open, non-discriminatory, and equitable multilateral trading system, including by concluding the WTO Doha Round negotiations;
- Significantly increasing developing country exports and doubling the share of global exports from least developed countries (LDCs) by 2020; and
- Timely implementation of 'duty-free quota-free' (DFQF) market access for LDCs developed countries, and simplification of preferential rules of origin applicable to imports from least developed countries.

One criticism of the treatment of trade in the SDGs is that by focusing on exports and remaining silent on imports it takes an overly 'mercantilist' view of trade and overlooks the fact that a lack of competitiveness is often a result of domestic policies including import restrictions. An alternative, or additional, target to reduce overall trade costs has therefore been suggested (Hoekman, 2015). While the wording of the goals themselves is subject to debate, the focus of this note is on the achievability, in the Asia-Pacific context, of the one clear numerical trade-related target included in the SDGs: the doubling of LDCs share in global exports. The target itself is not new, having already been agreed by the international community as part of the Istanbul Programme of Action (IPoA). [1]

[1] The IPoA is an internationally agreed programme of action to assist least developed countries covering the period 2011-2020. For details on the trade target see Para 65 (a) of the Istanbul Programme of Action document. (United Nations, 2011).

Asia-Pacific least developed countries: recent economic performance

Globally, forty-eight countries are classified as least developed countries; twelve of these are in the Asia-Pacific region.[2] While they are marked by enormous diversity in geography and population size, Asia-Pacific LDCs do face in common severe structural impediments to growth and sustainable development. These include the shared disadvantages of economic marginalization and the urgent need for structural transformations, in particular diversification.

GDP growth rates in Asia-Pacific LDCs have been reasonably strong in recent years: with average growth above five percent since 2013. These rates are not far below those experienced prior to the financial crisis, whereas for the Asia-Pacific region as whole growth has slowed significantly (table 1). Myanmar, Cambodia, and Lao People's Democratic Republic have been among the strongest performers compared with the Pacific Island states that have experienced slower growth. Many LDC economies are, however, still falling short of the desired threshold of 7 per cent annual growth set in the internationally agreed Istanbul Programme of Action (ESCAP, 2015). Average growth is forecast to pick up slightly in 2016 though the LDCs are particularly vulnerable to the downside risks posed by the global economy including, a sharper than expected slowdown in China or an emerging markets financial crisis (UN DESA, 2016). Commodity producing LDCs are particularly affected by falling prices and deteriorating terms of trade.

Table 1: Asia-Pacific Least Developed Countries, Annual GDP growth (per cent)

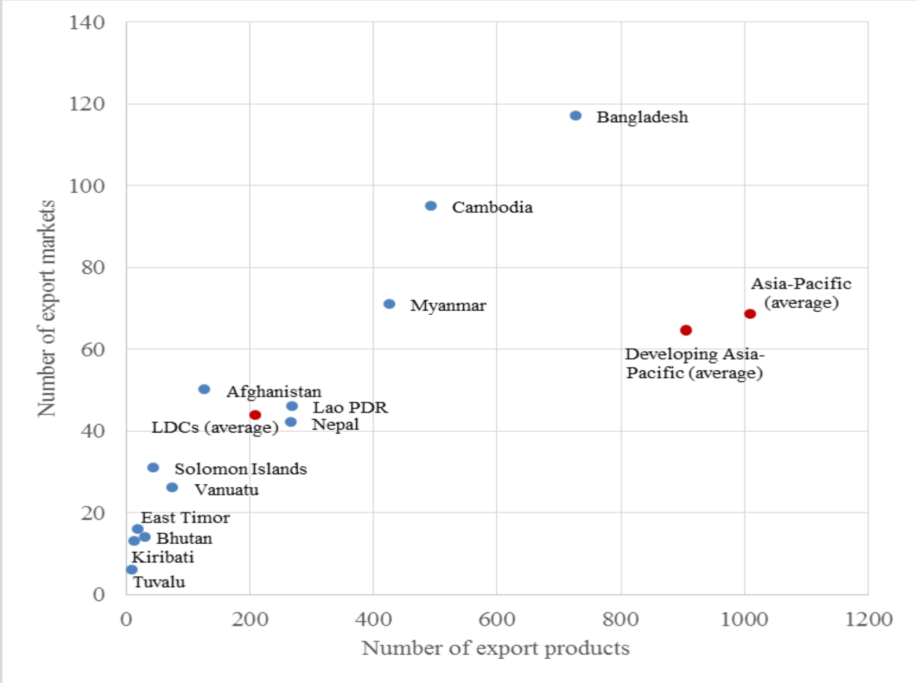
Country	2005-2007	2013	2014a	2015b	2016b
Afghanistan	10.2	3.6	3.2	4.5	5.0
Bangladesh	6.3	6.0	6.1	6.3	6.5
Bhutan	10.6	4.2	6.0	6.8	7.0
Cambodia	11.4	7.4	7.2	7.3	7.4
Kiribati	2.1	2.4	3.0	1.5	1.5
Lao People's Democratic Republic	7.7	8.5	7.5	7.2	7.2
Myanmar	12.9	8.3	7.8	8.3	8.2
Nepal	3.3	3.9	5.5	5.0	4.7
Solomon Islands	6.4	2.9	-0.2	3.0	3.5
Timor-Leste	5.0	5.4	7.1	6.5	6.5
Tuvalu	2.7	1.3	2.0	2.0	2.0
Vanuatu	6.3	2.0	3.6	-0.5	4.0
Least developed countries	**6.0**	**5.4**	**5.6**	**5.7**	**5.8**
Total Asia-Pacific	**6.8**	**4.1**	**3.5**	**3.4**	**3.7**

Source: ESCAP, 2016. Notes: (a) estimates (b) forecasts

Despite the broadly positive performance of Asia-Pacific LDCs, structural challenges persist. Partially as a result of their undiversified economic bases, LDCs are frequently relatively more vulnerable to both internal and external shocks, possess limited productive capacity, and suffer from severe infrastructure deficits. Measures of export diversification, which is a proxy for overall economic diversification show all LDCs lagging the Asia-Pacific developing country average in terms of number of exported products (figure 1). Bangladesh and Cambodia, however, do perform reasonably well considering the number of export markets they service. Trade policies that can support the overall goal of economic diversification and several supportive measures that the international community can take are outlined below.

[2] The Asia-Pacific LDCs are: Afghanistan, Bangladesh, Bhutan, Cambodia, Kiribati, Lao People's Democratic Republic, Myanmar, Nepal, Solomon Islands, Timor-Leste, Tuvalu and Vanuatu.

Figure 1: Export diversification of Asia-Pacific LDCs by products and markets (2013)



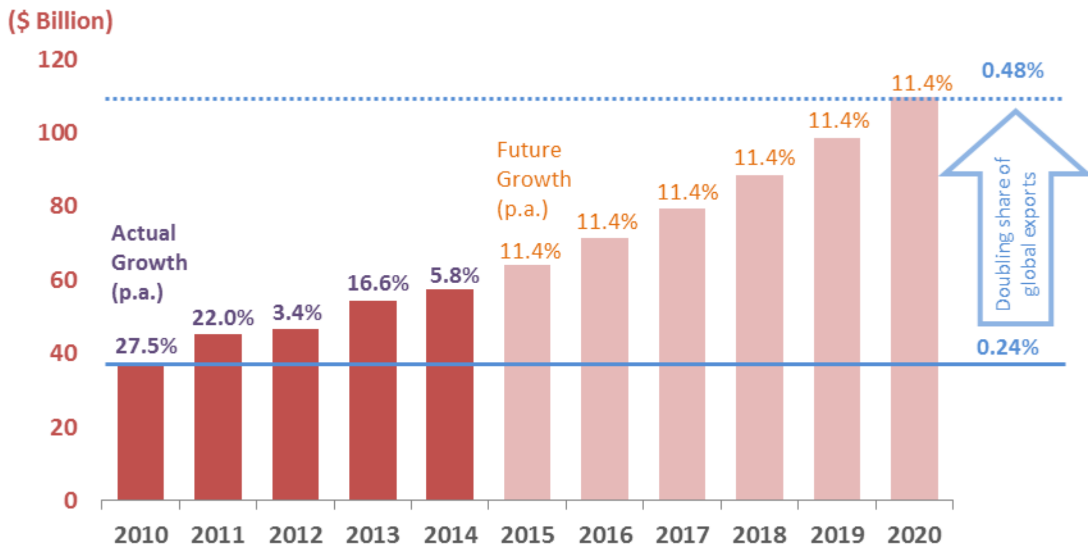
Source: World Bank Online Database. Accessed January, 2016.

Meeting the goals: scenarios for Asia-Pacific least developed countries' exports

Rising international trade can be an engine of growth. But what annual export growth rates would it take for Asia-Pacific LDCs to meet the SDG target of doubling their share of global exports by 2020? The answer to this question depends, first, on the baseline year chosen and, second, on the overall performance of global exports during the relevant period. As the SDG target mirrors the objective originally agreed in the Istanbul Programme of Action, which covers the period 2011-2020, we take 2010 as our baseline year. (Taking 2015 as the baseline to reflect the date of the adoption of the SDGs would imply more ambitious targets.) The SDG target is expressed as a share of global exports: the growth rate of the denominator (total global exports) clearly then influences the size of the expansion required to meet it. Global trade grew rapidly, readily exceeding global GDP growth in the years before the 2009 financial crisis. However, in the past few years trade has grown more slowly than GDP and export growth averaged only 1.2 per cent from 2012 to 2014. We consider three scenarios for annual global export growth: 1 per cent, 3 per cent and 5 per cent growth. The target as drafted in the SDGs is not specific on whether it applies only to merchandise trade or also to services trade, for the statistical analysis, we consider only the case of merchandise trade given the higher quality of available data. This is not though to dismiss the importance of services for Asia-Pacific LDCs; service exports have considerable promise for LDCs and will benefit if meaningful preferential access can be achieved (see next section). In addition, access to high-quality service inputs are important for the broader competitiveness of the economy, including for merchandise exports.

Turning to the data, total exports from Asia-Pacific LDCs were worth \$36.9 billion in 2010 and accounted for 0.24 per cent of global exports. These economies' subsequent export performance has in aggregate been quite strong with double-digit growth in 2010, 2011 and 2013. The group aggregate is heavily influenced by the performance of the largest exporters, Bangladesh and Cambodia, which have continued to see strong export growth, especially in the garments sector. By 2014, Asia-Pacific LDCs had already increased their total exports to \$57.4 billion, equivalent to 0.30 per cent of global exports. Looking forward to double the share of global exports to 0.48 per cent by 2020 - given the position in 2014 - would require export growth of 11.4 per cent annually assuming 3% annual total global export growth (figure 2). This would take the total value of exports from regional LDCs to $110 billion in 2020. In a scenario in which global export growth was slower – at 1 per cent per annum – Asia-Pacific LDCs could double their share by 2020 growing at a rate of 9.2 per cent a year; in a higher growth scenario of 5 per cent global growth, 13.5 per cent annual growth would be needed to reach the target.

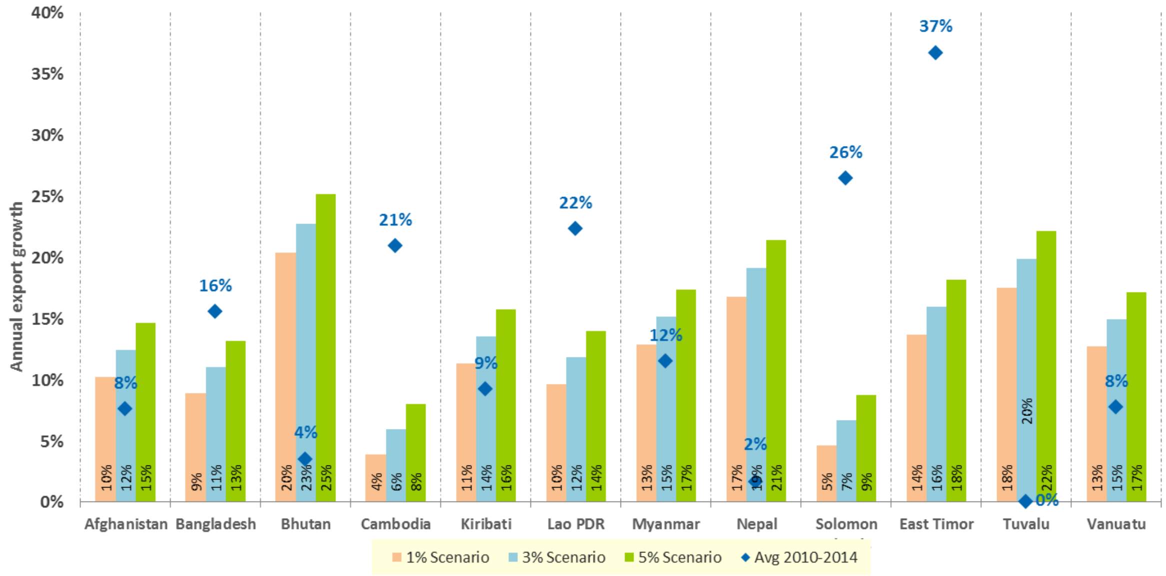
Figure 2: Total exports from Asia-Pacific LDCs, with projected future growth rates required to double the share of global exports by 2020 under a 3 per cent global export growth scenario



Source: Author calculations based on data from ESCAP online Database.

While the aggregate figures give a sense of the scale of the overall challenge, considering each country individually provides a more varied picture. The export performance of the Asia-Pacific LDCs has varied widely in the period 2010-14 leaving countries with challenges of very different sizes if they are to double their individual shares of global exports by 2010. For example, Cambodia has averaged 21 per cent annual export growth from 2010-14 and thus could reach the target in 2020 with growth from now on only in the range 4-8 per cent annually, depending on the size of the global expansion (figure 3). At the other end of the spectrum, exports from Nepal and Tuvalu have barely increased since 2010 and the scale of the task they face to double their share of exports is much steeper. Even in a low global export growth scenario (1 per cent annual increases), Nepal would need annual increases of 17 per cent from 2015 to reach the target.

Figure 3: Annual average export growth rates (2015-2020) required to double share of global exports contrasted with historic performance, under three global growth scenarios



Source: Author calculations based on data from ESCAP online Database.

Consideration of the historical record can shed light on how plausible it is that the current Asia-Pacific LDCs can reach the SDG target; or in other words, how realistic is it that they can enjoy a period of sustained export-led growth? The Asia-Pacific region has already witnessed several economic 'miracles' in which export-led growth, combined with rising investment levels led to rapid industrialization. For instance, the share of the 'Newly Industrialized Economies' in global exports (Republic of Korea; Singapore, Hong Kong, China and Taiwan Province of China) rose from 1.5 per cent in 1965, to 5.3 per cent in 1980 and to 7.9 per cent in 1990. Likewise the combined share of Malaysia, Thailand and Indonesia rose from 0.4 per cent in 1980 to 1.5 per cent a decade later (Weiss, 2005). More generally, analysis of the record of export growth among Asia-Pacific economies since 1980 shows that episodes in which global export shares doubled in a decade or less are not rare: 36 of the 57 economies for which data was available had experienced at least one doubling of their global export share in a rolling 10-year period. Set against these past performances, the target appears potentially achievable. Success though will depend heavily on the adoption of supportive policies, both by LDCs themselves and also their trading partners.

Delivering on the promise of trade for least developed countries

Supporting LDCs to meet the specific export target under Goal 17 needs to be part of a wider strategy of enhancing domestic competitiveness and furthering integration with the global and regional economy. The ability of LDCs to expand exports depends on: meaningful market access in product areas where LDCs have or might gain comparative advantage and the ability to diversify production and export products. Alongside LDCs domestic reform efforts, the global community can play a role across several dimensions:

- **Fully implement Duty-Free Quota-Free (DFQF) market access** – Most developed economies have now provided DFQF market access for LDC exports. The European Union now offers DFQF access on all tariff lines except arms through its Everything But Arms (EBA) policy. Australia and New Zealand also offer 100 per cent coverage, with Canada and Japan offering 98.6 per cent and 97.9 per cent respectively. One exception is the United States which has DFQF access for Asia-Pacific LDCs on around 83 per cent of products. The absence of DFQF access in the United States for Asia-Pacific garment and apparel exporters is a major disadvantage. Several developing economies in the Asia-Pacific region have also implemented DFQF schemes in recent years. For instance, China has recently updated its DFQF scheme, originally introduced in 2010. As of December 2015, the list of beneficiaries now covers 40 LDCs; zero tariff rates are applied for 97 per cent of products imported from 24 countries, 95 per cent of products from 14 countries, and 60 per cent of products from two countries (Bangladesh and Mauritania). India has also had a preferential scheme for LDCs that has been in operation since 2008. In 2014, India announced an increase in the number of tariff lines covered with the share rising to 98 per cent. Exports from least developed countries do appear to have increased as a result, however, some agricultural exports of interest to LDCs are not included (Ancharaz and Ghisu, 2014). It is hoped that these preferential schemes will continue to expand and improve over time (cf. Heal and Palmioli, 2015).

- **Tackle restrictive rules of origin or other non-tariff barriers -** Even where DFQF preferences are granted, in some cases LDCs may not be able utilize the preferential market access. Low utilization rates may be an indicator that preferences are hard to use in practice, or do not confer enough value to make compliance with conditions worthwhile. This can be for multiple reasons including restrictive rules of origin or high administrative costs. Stringent Rules of Origin (RoO) can restrict LDC eligibility for preferences. Or in some cases, LDC products would meet RoO, but the process of obtaining the certificate of origin and going through the due verification procedure can be so costly and cumbersome as not to be worthwhile for exporting under DFQF, as the cost of compliance is higher than the duty preference received. Thus they may choose to export under the MFN regime, or may not be able to engage in exporting at all. Recognizing this, the WTO Bali Ministerial Conference adopted guidelines on Preferential Rules of Origin for LDCs, calling on members to “ensure that preferential rules of origin applicable to imports from LDCs are transparent and simple, and contribute to facilitating market access” (WTO, 2013). Building on this, the decision adopted in Nairobi set a timeframe of 31 December 2016 for preference-granting members to undertake their commitments. Further, “regarding the value addition threshold, the document allows for the use of materials not originating from an LDC to make up to 75 per cent of the final value of a product for it to qualify for preferential treatment” (ICTSD, 2015). Whether this 75 per cent threshold is overly prohibitive or not remains contentious; modern manufacturing in GVCs often results in very little domestic content addition. LDCs also face severe capacity constraints in complying with mandatory standards in the form of Sanitary and Phytosanitary (SPS) measures and Technical Barriers to Trade (TBT). Obtaining the certificates of compliance for these standards is not only time consuming but also costly, as often the importing county’s agencies give these certificates. It is therefore important to make efforts to issue certificates for conformity assessments in the exporting country, though investment in sufficient laboratory capacity is an important prerequisite.

- **Deliver commercially meaningful preferences in services markets –** Service exports from Asia-Pacific LDCs’ have grown in absolute terms since 2000, but their share of total output has remained broadly constant in most economies. Most Asia-Pacific LDCs still heavily rely on travel and tourism for their service exports, but they have also ventured into exporting communications, transportation, construction, and insurance services. Services can play a major role in overall export diversification as well as supporting merchandise exports. In contrast with the situation for merchandise trade, until recently LDCs were not granted any preferential market access in services trade. This has now changed and progress is being made in the implementation of a 2011 WTO mechanism (the ‘Services Waiver’) that provides a route for countries to offer LDCs preferences in services. As of December 2015, twenty-one countries out of the 25 that indicated their intentions to provide preferential treatment to LDCs in services have so far submitted their notifications to the WTO setting out their preferential access offers. Early assessment of these offers shows that while many sectors are covered, commitments fall short of meeting the full LDC request, particularly regarding liberalization of services provided under ‘Mode 4’ covering the movement of natural persons (and particularly requests regarding visa procedures and application processes and fees). Another important aspect that needs to be addressed when talking about improving competitiveness of LDC exports, relates to the imports of services by LDCs. A combination of improved connectivity through physical infrastructure as well as supporting service sector liberalization would support not only trade in services but other related sectors.

- **Expand Aid for Trade to improve supply-side capacity -** Meeting the ambitious Sustainable Development Goals will take considerable financial resources. Aid for Trade – the premier international mechanism for trade-related assistance - will play a crucial role in this regard; mobilizing resources so that countries can tackle the obstacles they encounter, whether it is lack of infrastructure, customs procedures that need overhauling, or policies that are in need of reform. There needs to be an increase in resources committed to Aid for Trade between now and 2020. At the same time there are a number of areas where the effectiveness of current Aid for Trade programmes can be enhanced. First, a greater focus on trade policy and regulatory issues can produce big gains in terms of reducing trade costs. ESCAP analysis shows that the majority of trade costs are policy related and that they can be reduced significantly through implementation of the right combination of policies (Duval and Utoktham, 2011). However, while Aid for Trade commitments reached $41.5 billion in 2012, almost all went to economic infrastructure and productive capacity, with very little assistance on trade policy and regulatory issues. There is a need to further target and concentrate assistance on the countries where it is most needed. While the Asia and Pacific region is second only to Africa in receiving Aid for Trade commitments, programmes have expanded most significantly in middle-income countries, far less so in the least developed countries. Supporting trade finance for SMEs is also vital. Smaller businesses with little collateral, or based in countries with weak banking systems or unfavourable risk ratings, find it much more difficult to access trade finance.

Conclusion: Beyond the 2020 export target?

The process for translating the internationally agreed SDG targets into meaningful national action plans is only just getting underway. This is a crucial opportunity for LDCs, and other nations, to determine national development priorities on the basis of broad and inclusive dialogue. It is hoped that the potential of trade to be an engine of growth is fully recognized in this process. Indeed, a sustained programme of domestic reforms focused on economic diversification and competitiveness, combined with the right international enabling environment to improve market access, will give Asia-Pacific LDCs the best chance of realizing their economic potential. Whether LDCs are able to meet the specific LDC target will also depend, however, on hard-to-predict changes in the global economy.

In defining national goals and targets countries should think about ways of measuring trade performance in addition to export growth. In this regard, measures of trade costs or trade facilitation scores can be an important complement. By targeting sources of trade costs such as customs procedures, infrastructure bottlenecks and behind-the-border barriers, countries can reduce burdens for both exporters and importers. This helps recognize that efficient and cost-competitive access to imports is often as important to businesses success as market access overseas – this is especially the case in a world of global value chains where components often cross borders multiple times during the production process. Finally, as the SDG agenda runs until 2030, LDCs should think beyond the 2020 export target and develop a longer-term perspective on incorporating trade into national development strategies.

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