

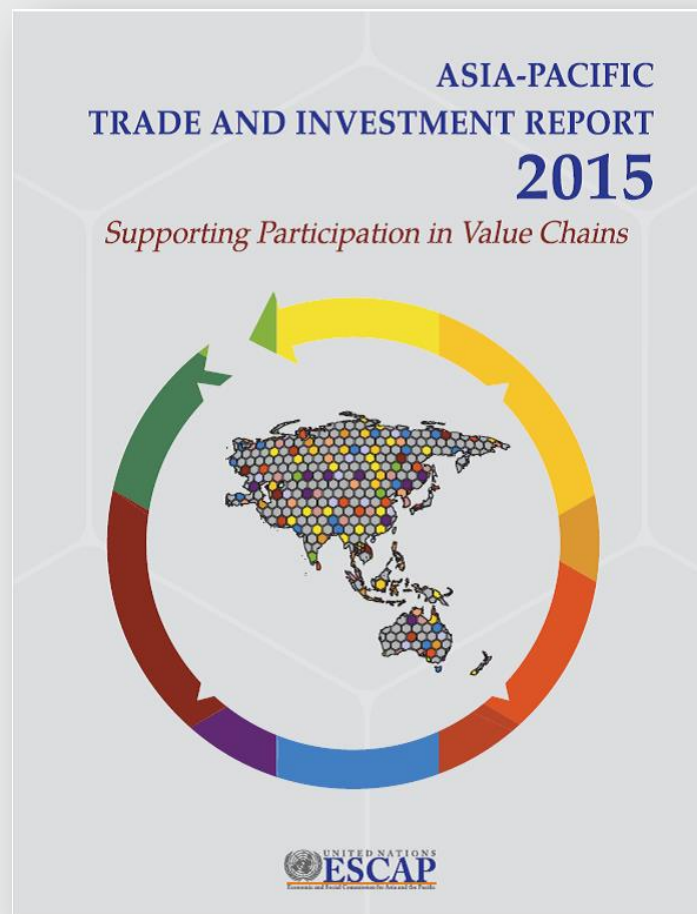


ADB-ESCAP JOINT WORKSHOP

Research, Tools and DATA for Evidence-Based Trade Policy Making
5-6 November 2015, Bangkok, Thailand

Asia-Pacific Trade and Investment Report 2015: *Supporting Participation in Value Chains*

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Agenda

- ▶ Participation of Asia-Pacific region in the Global Value Chains
- ▶ The roles of policies in strengthening regional participation in GVCs
- ▶ Priorities at different development levels



Rising of global trade in intermediates

“About 60% of global trade, which today amounts to more than \$20 trillion, consists of trade in *intermediate goods and services* that are incorporated at various stages in the production process of goods and services for final consumption” (UNCTAD, 2013, p. 122)

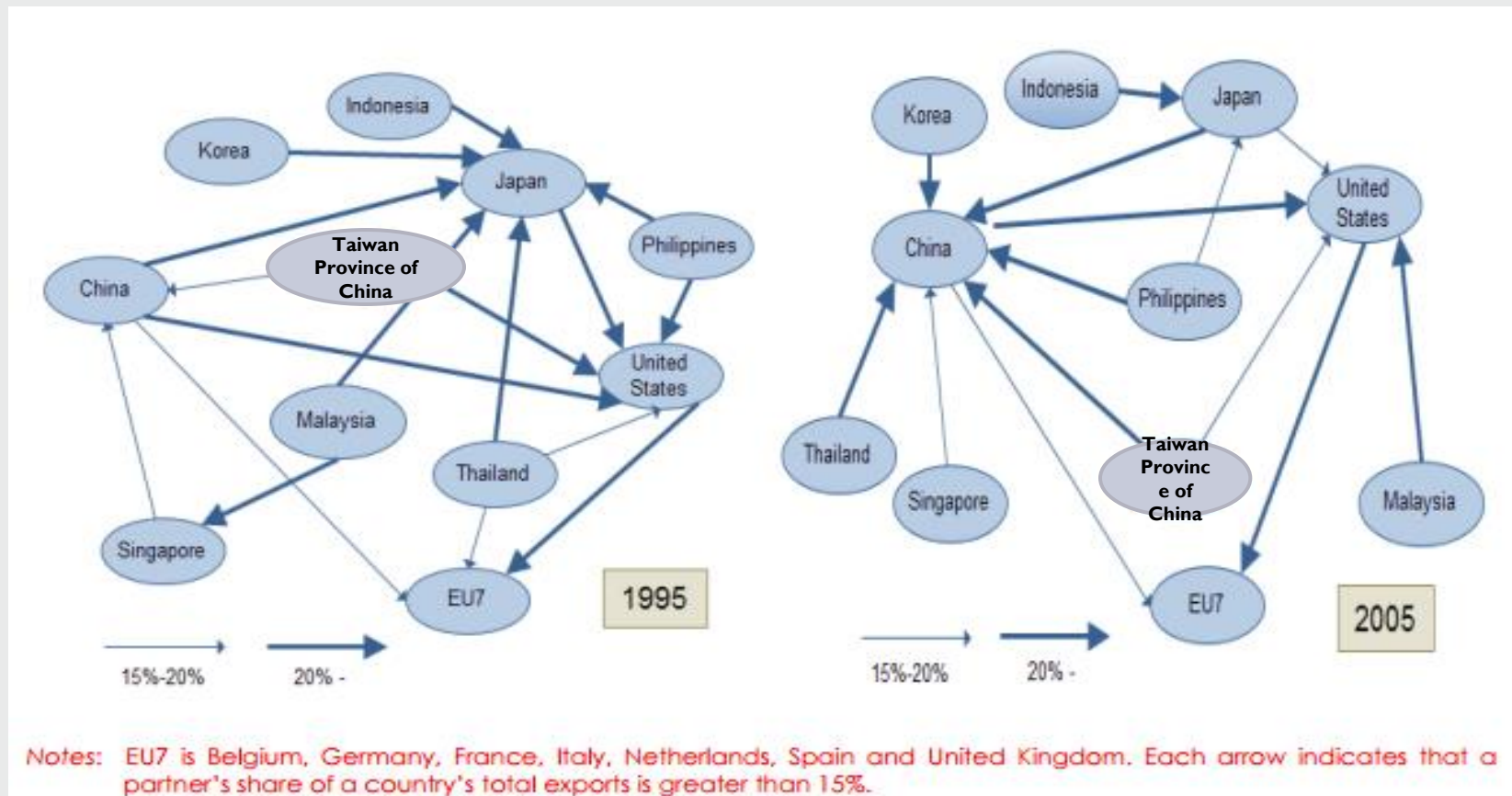
✓ More than **half** of world **manufactured imports** are intermediate goods

✓ More than **70%** of world **services imports** are intermediate services





Changing of regional trade architecture



Source: Yamano, Meng, Fukasaku (2011)



Measurements of GVC participation

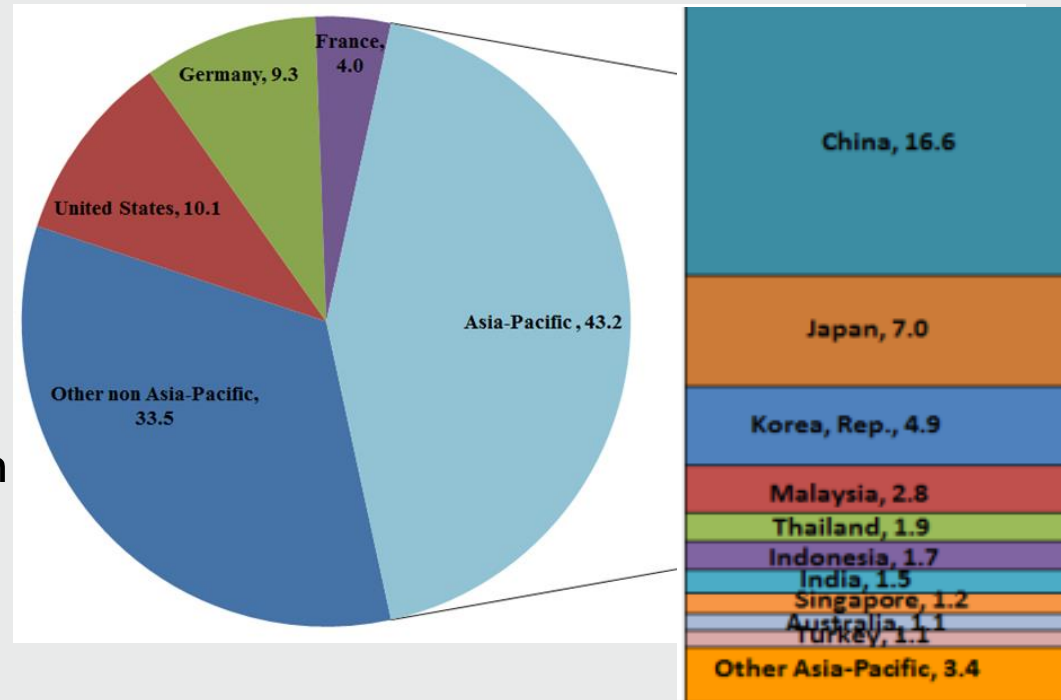
- ▶ We are based on a conservative approach, which is the statistics on trade in intermediates, we take one step further.
 - ▶ Using Sturgeon and Memodevic (2010)'s classification of 'customized' final and intermediate manufacturing products in combination with the United Nations' Broad Economic Categories (BEC)'s classification of products by 'their uses'.
- ▶ **GVC-related exports** of 'final' and 'intermediate' goods from Asia-Pacific economies from 1995 to 2013 in 5 sectors.
 - ▶ Apparel and footwear
 - ▶ Automotive
 - ▶ Electronics
 - ▶ Processed Agriculture
 - ▶ Primary agriculture



Asia-Pacific region in the Global Value Chains

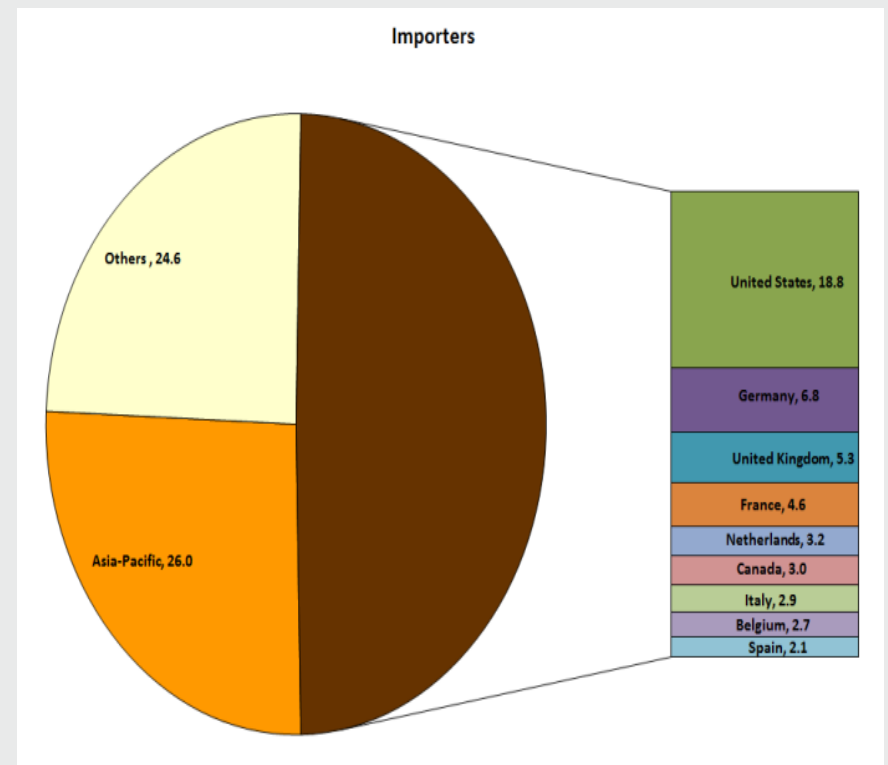
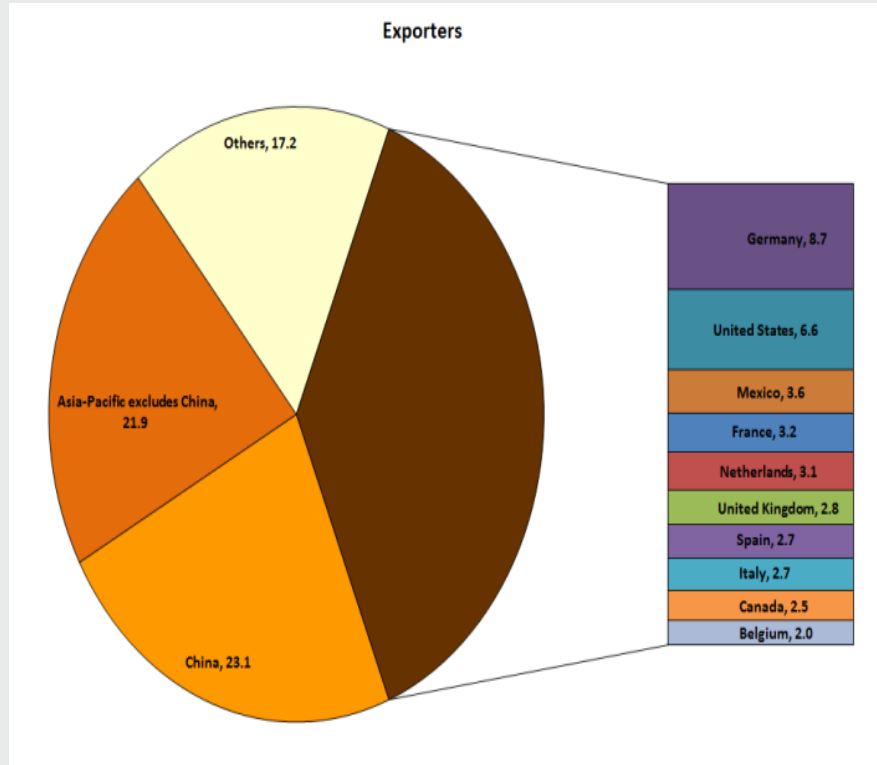
- ▶ GVCs dominate policy discussions, but we lack a common yardstick for measurement.
- ▶ The region plays a major role on the supply side of GVCs: 43% of global intermediates exports and 39 % for imports.
- ▶ 90% of the GVC participation by the region is concentrated in only 10 countries. Low-income economies are largely bypassed.

Shares in global exports of GVC-intermediate products (2013)





- ▶ The region's role on the final demand side of GVCs, although rising, is still limited—reflected by a large gap final export and import shares of final products (45% vs 26%).



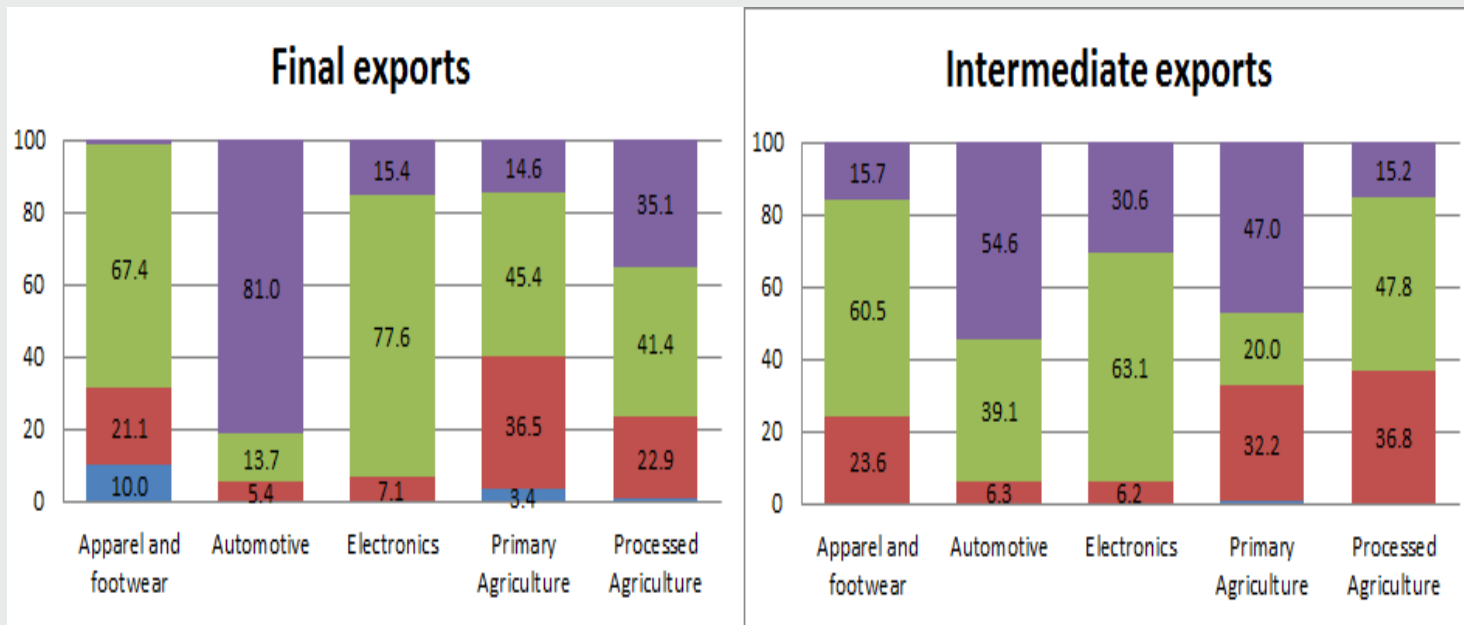
Source: ESCAP calculations based on data from United Nations Comtrade database



Asia-Pacific economies

Does a country development level matter for its participation in GVCs?

- ▶ The low-income countries are largely bypassed by GVCs.



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