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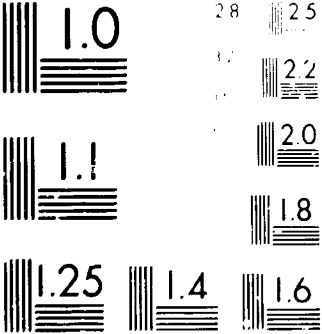
UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION
Vienna International Centre, P.O. Box 300, 1400 Vienna, Austria
Tel: (+43-1) 26026-0 · www.unido.org · unido@unido.org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Second Session of the Ad Hoc Industrial Working Group

Vienna, Austria, 26 November - 2 December 1982

BACKGROUND PAPER FOR THE SECOND MEETING OF THE INDUSTRIAL WORKING GROUP OF THE LEATHER AND LEATHER PRODUCTS INDUSTRY PANEL *

Prepared by the UNIDO secretariat

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I. INTRODUCTION

1. The fifth session of the UNIDO Leather and Leather Products Industry Panel, held in November 1981, requested the UNIDO secretariat to study the parameters governing the development of the Leather and Leather Products Industry, in order that it could advance its discussion of ground rules for the rationalization of world production marketing and trade. These parameters were identified as:

(i) Production and trade in raw hides and skins;

(ii) Prevailing policies in the trade of leather and leather products;

(iii) The effects of meat production and trade on the availabilities of raw hide and skins;

(iv) The effects of a liberalized trade regime on the different groups of developed and developing countries 1/

2. The present paper concentrates on a quantitative estimation of trends in these parameters, and proposes certain areas for discussion, which in the opinion of the Secretariat, could form a basis for progress in the discussion concerning the ground rules.

3. The secretariat has tabled this paper before the Industrial Working Group in order to assess the most likely trends in the industry, and to focus on realistic areas for a resolution of the discussion, given current trends. For this reason, the secretariat has found it necessary not to place emphasis on the problem of world-wide production and trade in meat, which requires discussions in a wider context than that of industrial development of the leather sector, and in fora other than UNIDO. Furthermore, the secretariat has not tabled a set of alternative solutions for acceptance or rejection by the Panel, since it would prejudge the possible conclusion on this issue. Instead, the secretariat has raised a number of pertinent questions which need to be considered when formulating the ground rules. It is suggested that the recommended international division of labour in the sector should be contemplated as being established along the processing chain from hides and skins to leather products, rather than being on the basis of a reciprocal trade arrangement between "raw materials" and "products", howsoever, these two categories may be defined.

1/ ID/WG.353/5 Report of the Fifth Session of the Leather and Leather Products Industry Panel, Vienna, 25-27 November 1981.

II. PRODUCTION, TRADE AND CONSUMPTION IN HIDES AND SKINS, LEATHER AND LEATHER PRODUCTS:

4. The ensuing analysis has been conducted on the basis of global data for the period 1976-1979. The trends observed seem sufficiently pronounced to serve as a basis for the conclusions presented in the last section of this paper.

The Hides and Skins Sector [2/]

5. World production of Hides and Skins increased at an annual average rate of 0,2 %. The production of developed countries declined by 0,8 % per annum whereas the production of developing countries increased by 1,3 % per annum. This increased the share of the developing countries in world production, which went up from 41,9 % in 1976 to 44,1 % in 1979.

6. Trade relationship are presented in Annex Table 3, which presents the ratios of imports to apparent consumption and exports to production for each of the two groups of countries. The data are summarized below:

Commodity	Regions	Imports / Apparent Consumption	Exports / Production
		(approx. % over 1976-79)	
Cattle Hides and Calf skins	Developed	50	48
	Developing	12	5
Sheep and Lambskin	Developed	67	57
	Developing	21	35
Goat and Kidskins	Developed	83	48
	Developing	7	23

7. These crude averages seem to reflect the fact that with the notable exception of cattle hides and calfskins, there does not seem to be an excessive restriction in the flow of raw material into world markets.

[2/] For details, see Annex Tables 1-3, Pages 9-11.

The Leather Industry [3/]

8. World production of heavy leather declined at an annual average rate of 0,4 % and production of light leather increased by 0,5 % per annum. For the former commodity, the decline in production of the developed countries could not be offset by increases in the output of developing countries. This was not so in the latter case where the developing countries were able to expand their output by 2,0 % per annum to offset the production decline in the developed countries. The share of developing countries in global production of heavy leather increased from 37,7 % in 1976 to 39,1 % in 1979. In the case of light leather their share increased from 41,8 % to 43,9 % over the same period.

9. Annex Table 6 presents the ratios of imports to apparent consumption and exports to production for leather. These are summarized below in terms of crude averages for each of the commodities in this group.

Commodity	Region	Imports / Apparent Consumption	Exports / Production
		(approximate % over 1976-79)	
Heavy Leather	Developed	26,8	18,5
	Developing	30,3	26,7
Light Leather: Cattle and Calf	Developed	19,0	15,0
	Developing	6,15	24,8
Light Leather: Sheep and Goat	Developed	36,6	20,4
	Developing	8,6	42,5

10. There seems to be an even more active flow of leather in world markets compared to that of hides and skins. In addition, the trends over the four years indicate that the two ratios under consideration are either stable or increasing over time, under the prevailing trade regime.

[3/] See Annex Tables 5-7, Pages 12-14.

The Footwear Sector [4/]

11. The only available consistent data on the volume of trade in leather products are those for the footwear sector.

12. World production of leather footwear increased at an annual average rate of 0,5 %, and developing countries increased their share of global production from 27,9 % in 1976 to 30 % in 1979. However, their relative insignificance in leather footwear market is witnessed by the fact that their share of world exports never exceeded 17,3 % and their share of world imports seems constant at about 2,8 %.

13. The relationships between production and trade are presented in Annex Table 9. A summary, similar to that of the previously discussed sectors, is given below.

Region	Imports / Apparent Consumption	Exports / Production
	(approximate % 1976-79)	
Developed	23,7	21,5
Developing	1,8	9,7

14. The obvious contrast of the global situation of developing countries in the field of leather footwear, as opposed to hides and skins and leather, is readily apparent. It seems that the developing countries are primarily endeavouring to meet their domestic demand for leather footwear, with the result that they are not significant partners in international trade, either as importers or exporters in this product category.

Leather Manufacturers [5/]

15. The available data records monetary values of world trade in this commodity (SITC 612). Although not providing as clear a definition of trends as in the previous categories, these data bear reproduction to assess the regional composition of world trade. In terms, the share of developing countries in World market economy countries has increased from 16.2 % in 1976 to 24 % in 1979. A large part of this export trade has been in footwear components (SITC 6123) whose share in developing country exports of leather manufactures went up from 67 % in 1976 to 77 % in 1979.

4/ See Annex Tables 7-9, Pages 15-17.

5/ See Annex Table 10, Page 18.

III. AREAS FOR DISCUSSION

16. Given the difficulty of obtaining precise data on the Leather and Leather Products Industry, discussion of policy issues has to rely as much on educated observation as on quantitative assessment of world trends. As such, the issues raised in this section rely as much on a synthesis of the opinions and observations presented to the UNIDO secretariat by members of the industry, as they do on the foregoing analysis. The questions posed to the Working Group are presented for each subsector in turn:

Raw Hides and Skins

17. The patterns of production and trade summarized in Section I indicate that:

(a) There are only marginal annual increases in global production of raw hides and skins. This slow rate of growth may be primarily due to stagnant or declining rates of meat consumption in the developed countries, which in turn reduces slaughter rates, hence the hide and skin offtake.

(b) With the major exception of cattle hides and calfskins, the commodity trade pattern does not indicate a constrained flow of raw hides and skins into world markets, under the present trade regime.

(c) In the case of cattle hides and calfskins, at least three factors could contribute for the exceptionally low ratios of developing country exports to production. These are:

- Demand for cattle hides and calfskins to be processed into leather for the internal markets of developing countries;
- The unsuitability of certain grades of hides in this commodity category for the international markets;
- Tendencies to shift away from exports of raw hides towards fully processed or semi-processed leather. These could have been effected either on criteria of technical or economic efficiency or by commercial barriers imposed by developing country governments to further their industrialization objectives.

18. It is nearly impossible to seperate the individual effects of these three factors. Nevertheless, it is debatable whether a movement to enforce multilateral liberalization in this commodity category would, in itself, raise the percentage of developing country raw hides production flowing into world markets.

Leather

19. Unfortunately, the data cannot be decomposed into trends for semi-processed (wetblue or crust) leathers as opposed to ready-to-finish and finished leathers. But it would not be inaccurate to surmise that the exports of developing countries have been growing due to increased production of semi-finished leather, which is rapidly becoming the major internationally traded raw material for the global tanning industry. Here again, the trend should be evaluated on the basis of the following considerations:

- Export of semi-finished leathers from most developing countries may be commercially more sound, on the criteria that it enables better grading and sorting by the buyer, and provides for more economical transportation than export of raw hides or skins;
- The initial stages of hides and skins processing are the most ecologically detrimental phases of tanning industry. Many developed country firms have not been inclined to undertake the capital expenditures required to control effluents, preparing instead to import semi-processed leather or to engage in offshore tanning activity in those developing countries which have appropriate supplies of raw material and/or readily available industrial skills;
- The tanning industry has adapted itself, to some extent, to the global restructuring of the industry, by concentrating on finishing leather, as opposed to undertaking the entire tanning process.

20. In the light of this, it seems fair to suggest that the leather trade between developed and developing countries displays two major features:

(a) In the case of light leathers there is a continuation of increasing exports of semi-processed leather from those developing countries with supplies of raw materials. This commodity is finished by firms in the developed countries, who have greater technical skill in this area, as well as the information and operational flexibility to respond to demands of their domestic markets.

(b) There is an export of raw hides and semi-processed leather from developed countries to some developing countries. The differential in labour costs and availability of industrial skills in these developing countries is such that it is commercially viable to transport raw hides and skins and semi-processed leather to them, for purpose of re-export as finished leather and certain types of leather products.

21. Would either of these two trends be commercially detrimental to the global tanning industry?

Leather Products

22. Developing countries are relatively insignificant exporters or importers of leather footwear with their domestic consumption providing the major market for their output. The most significant restructuring of the industry has been observed among the industrialized countries, with the rapid shift of comparative advantage from Northern to Southern Europe. The adaption of the industry in the United States and Northern Europe to the competitive pressure imposed by the Southern European countries has been through:

- Capacity closures, especially among smaller manufactures;
- Technological revitalization and increasing automation in the surviving firms,which provides for a saving of labour costs in certain aspects of footwear production;
- Greater international sourcing of production, by increasing the import of footwear components (e.g. manufactured leather shoe uppers) from low labour-cost countries, for final assembly in the relatively automated, high labour-cost plants of the developed countries.
- Movement of some footwear companies exclusively into the retailing and marketing end of the business, with the footwear being imported from the more competitive development and developing countries' manufacturers.

23. By and large, it seems that similar trends exist in the case of other leather products. Are these trends considered detrimental, either in industrialization prospects for the developing countries or to the efficiency of the industry in the developed countries?

IV. CONCLUSIONS: PROPOSED CRITERIA FOR GROUND RULES

24. Given the preceeding discussion the secretariat would like to table the following considerations before the Industrial Working Group:

(a) The ground rules should be of general relevance across the Leather and Leather Products Industry and not dominated by considerations of supply characteristics of individual commodities or groups of countries. The problems of individual commodities or countries can best be handled (as is being done currently) through commodity-specific or country-specific negotiations and not by multilaterial discussions.

(b) The ground rules should take some account of current pattern of production and trade, which may not, in the long run, be detrimental to the global industry.

(c) In the leather sector it seems that the international division of labour will, for the time being, be in the nature of developing countries performing initial processing of the raw material and developed countries finishing leather in accordance with requirements of their markets. This is not only politically determined evolution, but one that is proven to be a commercially vialbe solution. Should this trend be advanced or retarded by the ground rules?

(d) Given the fundamentally different production and trade patterns between leather and leather products, it does not seem realistic to attempt to establish reciprocity in terms of these two components of the industry. It seems doubtful whether developing countries are in a position to avail of the effects of liberalized developed country markets in the leather footwear and the leather manufactures sectors, given their current status in production and consumption.

(e) At the political level, it would be impossible to justify a recommendation of "ground rules" which controvert internationally agreed industrialization objectives of the developing countries.

STATISTICAL ANNEX

TABLE 1

WORLD PRODUCTION, TRADE AND CONSUMPTION OF HIDES AND SKINS [6/]

Commodity	Unit	Year [7/]	Region	Production	Imports	Exports	Apparent Cons.
Cattle Hides and Calf Skins	thous. tons	1976	Developed	3149.9	1294.0	1479.3	2964.6
			Developing	2057.4	241.8	131.2	2168.0
		1977	Developed	3106.5	1241.5	1439.8	1908.2
			Developing	2133.2	258.8	105.7	2286.3
		1978	Developed	3043.7	1272.5	1514.1	2802.1
			Developing	2199.6	309.2	102.7	2406.1
		1979	Developed	2876.4	1233.9	1453.6	2656.7
			Developing	2172.6	309.8	118.3	2364.1
Sheep and Lambskins	thous. tons	1976	Developed	196.4	182.3	114.3	264.4
			Developing	119.3	19.4	43.8	94.9
		1977	Developed	193.7	169.6	109.3	254.0
			Developing	122.1	20.2	44.5	97.8
		1978	Developed	201.8	163.0	104.6	260.2
			Developing	125.1	21.5	45.1	101.5
		1979	Developed	192.2	174.3	114.3	252.2
			Developing	127.8	21.9	41.2	108.5
Goatship and Kidskins	thous. tons	1976	Developed	10.5	27.4	6.5	31.4
			Developing	119.3	6.5	29.2	96.6
		1977	Developed	10.6	23.1	3.5	30.2
			Developing	122.3	7.[illegible]	27.9	101.5
		1978	Developed	10.8	28.4	4.9	34.3
			Developing	127.0	7.2	28.7	105.5
		1979	Developed	10.6	31.4	5.6	36.4
			Developing	129.3	7.3	28.0	108.6

6/ Source: FAO World Statistical Compendium for Raw Hides and Skins, Leather and Leather Footwear, 1961-79.

7/ The data for 1978 are preliminary and are estimated for 1979.

TABLE 2

HIDES AND SKINS: GLOBAL SHARES OF PRODUCTION AND TRENDS IN PRODUCTION, TRADE AND CONSUMPTION 1976-1979 8/

Commodity	Region	Share pf World Output 1976 (%)	1979 (%)	Annual average growth rates 1976-1979 (%) Production	Imports	Exports	App. Cons.
Cattle Hides and Calf Skins	Developed	60.5	57	- 2.3	- 1.2	- 0.44	- 2.9
	Developing	39.5	43	1.3	5.4	- 2.4	2.1
	World	100.0	100.0	- 0.8	0.12	- 2.5	- 0.6
Sheep and Lambskins	Developed	62.2	60.1	- 0.6	- 1.1	0.-	- 1.2
	Developing	37.8	39.9	1.7	2.8	- 1.6	3.1
	World	100.0	100.0	0.33	- 0.7	- 4.1	0.1
Goatskin and Kidskins	Developed	8.1	7.6	0.2	3.2	- 4.0	3.4
	Developing	91.9	92.4	1.9	2.7	- 1.1	2.8
	World	100.0	100.0	1.8	3.1	- 1.6	2.9
Total Hides and Skins	Developed	58.1	55.9	- 0.8	- 1.1	- 0.4	
	Developing	41.9	44.1	1.3	5.3	- 2.2	
	World	100.0	100.0	0.2	0.1	- 0.6	

8/ Source: Computed from Table 1

TABLE 3

HIDES AND SKINS: RATIOS OF

TRADE TO PRODUCTION AND APPARENT CONSUMPTION [9/]

Commodity	Year	Region	Imports / Apparent Cons. (%)	Exports / Production (%)
Cattle Hides and Calf Skins	1976	Developed	43.6	47.0
		Developing	11.1	6.4
	1977	Developed	65.1	46.3
		Developing	11.3	4.9
	1978	Developed	45.4	49.7
		Developing	12.8	4.7
	1979	Developed	46.4	50.5
		Developing	13.1	5.4
Sheep-and Lamb-skins	1976	Developed	68.9	58.2
		Developing	20.4	36.7
	1977	Developed	66.8	56.4
		Developing	20.7	36.5
	1978	Developed	62.6	51.8
		Developing	21.2	36.1
	1979	Developed	69.1	59.5
		Developing	20.1	32.2
Goat-and Kid-skins	1976	Developed	87.3	61.9
		Developing	6.7	24.5
	1977	Developed	76.5	33.0
		Developing	7.0	22.8
	1978	Developed	82.8	45.4
		Developing	6.8	22.5
	1979	Developed	86.2	52.8
		Developing	6.7	21.7

9/ Source: Computed from Table 1.

TABLE 4

WORLD PRODUCTION TRADE AND CONSUMPTION OF LEATHER 10/

Commodity	Unit	Year 11/	Region	Production	Imports	Exports	Apparent Cons.
Heavy leather	thous. tons	1976	Developed	358.1	84.1	75.1	367.1
			Developing	216.9	74.8	46.8	244.9
		1977	Developed	344.2	90.4	62.7	371.9
			Developing	227.4	69.8	53.7	243.5
		1978	Developed	344.1	100.9	60.7	384.3
			Developing	222.8	86.1	56.7	252.2
		1979	Developed	344.9	143.2	60.4	427.7
			Developing	221.8	94.7	59.6	256.9
Light leather Cattle and Calf	million sq. ft.	1976	Developed	5283.6	1006.1	741.4	5548.3
			Developing	2366.0	105.6	506.4	1965.2
		1977	Developed	5114.2	999.0	797.2	5316.0
			Developing	2493.0	118.7	605.5	2006.2
		1978	Developed	5217.6	981.1	754.7	5444.0
			Developing	2541.6	130.4	669.4	2002.6
		1979	Developed	5232.6	1152.4	829.5	5555.5
			Developing	2553.0	135.6	693.6	1995.6
Light leather Sheep and Goat	million sq. ft.	1976	Developed	1998.3	947.6	389.6	2556.3
			Developing	1037.1	58.0	445.1	650
		1977	Developed	1880.1	790.7	402.4	2268.4
			Developing	1071.2	58.4	447.5	682.1
		1978	Developed	1954.6	880.7	394.6	2440.7
			Developing	1111.6	57.3	477.6	691.3
		1979	Developed	1980.9	977.3	402.1	2556.1
			Developing	1148.7	62.3	485.6	725.4

10/ Source: FAO World Statistical Compendium for Raw Hides and Skins, Leather and Leather Footwear, 1961-79.

11/ The data for 1978 are preliminary and are estimated for 1979.

TABLE 5

LEATHER: GLOBAL SHARES OF PRODUCTION AND TRENDS IN PRODUCTION, TRADE AND CONSUMPTION 1976-1979 (%) 12/

Commodity	Region	Share of World Output 1976 (%)	Share of World Output 1979 (%)	Average annual growth rates 1976-1979 (%) Production	Imports	Exports	App. Cons.
Heavy Leather	Developed	62.3	60.9	- 1.0	10.3	- 6.1	3.5
	Developing	37.7	39.1	0.5	5.2	5.4	1.2
	World	100.0	100.0	- 0.4	8.3	- 0.4	2.6
Light Leather Cattle and Calf	Developed	69.1	67.2	- 0.2	3.2	2.7	0.03
	Developing	30.9	32.8	1.8	5.5	6.7	0.4
	World	100.0	100.0	0.4	3.4	4.5	0.12
Light Leather Sheep and Goat	Developed	65.8	63.3	- 0.2	0.85	0.77	0.-
	Developing	34.2	36.7	2.4	1.7	2.1	2.6
	World	100.0	100.-	0.75	0.8	1.5	0.6
Total Light Leather	Developed	68.2	66.1	- 0.2	2.1	2.0	
	Developing	41.8	43.9	2.0	4.3	4.8	
	World	100.0	100.0	0.5	2.3	3.4	

12/ Source: Computed from Table 4.

TABLE 6

LEATHER: RATIOS OF TRADE TO PRODUCTION AND APPARENT CONSUMPTION 13/

Commodity	Year	Region	Imports / Apparent Cons. (%)	Exports / Production (%)
Heavy leather	1976	Developed	22.9	21.0
		Developing	21.6	30.5
	1977	Developed	24.3	18.2
		Developing	28.7	23.6
	1978	Developed	26.3	17.6
		Developing	34.1	25.5
	1979	Developed	33.5	17.5
		Developing	36.9	26.9
Light leather: Cattle and Calf	1976	Developed	18.1	14.0
		Developing	5.4	21.4
	1977	Developed	18.8	15.5
		Developing	5.9	24.3
	1978	Developed	18.1	14.5
		Developing	6.5	26.4
	1979	Developed	20.7	15.9
		Developing	6.8	27.2
Light leather: Sheep and Goat	1976	Developed	37.1	
		Developing	8.9	[illegible]
	1977	Developed	34.9	21.4
		Developing	8.6	41.8
	1978	Developed	36.1	20.2
		Developing	8.3	43.0
	1979	Developed	38.2	20.3
		Developing	8.5	42.3

13/ Source: Computed from Table 4.

TABLE 7

WORLD PRODUCTION TRADE AND
APPARENT CONSUMPTION OF LEATHER FOOTWEAR,
ALL TYPES: 1976-1979 (MILLION PAIRS) 14/

Year	Region	Production	Imports	Exports	Apparent Cons.
1976	Developed	2264.0	533.9	445.6	2352.3
	Developing	877.1	14.8	75.7	816.2
1977	Developed	2213.9	536.0	445.6	2304.3
	Developing	910.9	14.1	83.3	841.7
1978	Developed	2177.4	530.5	470.3	2237.6
	Developing	937.8	15.2	98.5	845.5
1979	Developed	2240.5	575.7	552.3	2263.8
	Developing	962.4	16.3	107.2	871.5

14/ Source: FAO Statistical Compendium.

TABLE 8

LEATHER FOOTWEAR: SHARES OF WORLD PRODUCTION, IMPORTS AND EXPORTS (%) 15/

Year	Region	Production	Imports	Exports
1976	Developed	72.1	97.3	85.5
	Developing	27.9	2.7	19.5
1977	Developed	70.8	97.4	84.2
	Developing	29.2	2.6	16.8
1978	Developed	70.0	97.2	82.7
	Developing	30.0	2.8	17.3
1979	Developed	70.0	97.2	83.7
	Developing	30.0	2.8	16.3

15/ Source: Computed from Table 7.

TABLE 9

LEATHER FOOTWEAR RATIOS OF TRADE TO PRODUCTION AND APPARENT CONSUMPTION, 1976-1979 16/

Year	Region	Imports/Apparent Cons. (%)	Exports/Prod. (%)
1976	Developed	22.7	19.7
	Developing	1.8	8.6
1977	Developed	23.2	20.1
	Developing	1.7	9.4
1978	Developed	23.7	21.6
	Developing	1.8	10.5
1979	Developed	25.4	24.6
	Developing	1.9	11.1

16/ Source: Calculated from Table 7.

TABLE 10

LEATHER MANUFACTURES:
IMPORTS AND EXPORTS OF MARKET ECONOMY COUNTRIES 17/
(Values in millions of US dollars)

Year	Region	Imports	% of World	Exports	% of World
1976	Developed	315.1	83.1	335.4	83.8
	Developing	62.2	16.9	64.7	16.2
1977	Developed	406.5	78.9	427.0	81.9
	Developing	108.9	21.1	94.4	18.1
1978	Developed	532.4	77.9	515.5	75.2
	Developing	151.0	22.1	170.0	24.8
1979	Developed	697.1	83.8	660.6	76.0
	Developing	135.0	16.2	208.9	24.0

17/ Source: U.N. Yearbook of International Trade Statistics,1980.