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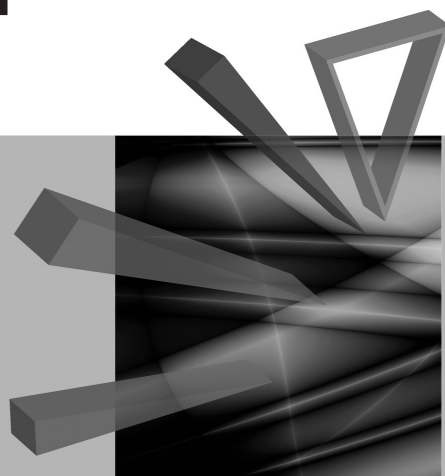
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# **Economical and Political Interrelations in the Asia-Pacific Region**



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## EXPORT GROWTH PATHS IN SELECTED ASIAN COUNTRIES IN THE 21<sup>ST</sup> CENTURY

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**Abstract:** The paper attempts to evaluate the impact of the new price relations on the shifts in the positions of selected Asian economies in the global ranking of exporters. Particular attention was paid to the commodity structure of exports of highly industrialized economies such as Japan, China and newly industrialized economies. The evidence from the research suggests that these countries reacted differently to the new price relations in the world economy. Of key importance was a given country's ability to adapt to this phenomenon by changing its commodity structure of exports on the one hand while increasing the growth rate of its volume on the other. As a consequence, three individual paths of growth in export can be distinguished for different economies: Japan, China and newly industrialized economies.

**Keywords:** East Asian economies, international trade, commodity structure of exports, world prices.

### 1. Introduction

The last several years have witnessed major transformations in the structure of international trade, which had been influenced to a large degree by the changes in the prices of commodities exported. As opposed to the relative growth in the prices of manufactured goods and changes in the price relations to the disadvantage of primary commodities, which had been observed throughout the entire second half of the 20<sup>th</sup> century, the trend reversed at the beginning of the present century. The most recent literature on international economic relations and reports by various international organisation emphasise the already established phenomenon of relative rises in the prices of primary commodities (closure of "price scissors"), i.e., new price relations. This trend is expected to continue in the nearest future.<sup>1</sup>

In the paper it is assumed that these price relations affected differently the exports of individual economies in question and hence their positions in the global exports.

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<sup>1</sup> For more details see: J. Dudziński, Proces zwierania się cen w handlu międzynarodowym i jego przyczyny, [in:] J. Schroeder, Ł. Puślecki (Eds.), *Gospodarka międzynarodowa – wyzwania i nowe trendy*, Zeszyty Naukowe Uniwersytetu Ekonomicznego w Poznaniu no. 179, Poznań 2011, pp. 69–83.

The authors focus in particular on the relevance of factors such as exports volume (and potential to increase its growth rate) and commodity structure of exports (and efforts towards aligning it with the price tendencies).

The aim of the paper is to explore the reactions of Asian countries – particularly those whose commodity structures are dominated by manufactured goods – to the new price phenomena. And so the study focuses on China, Japan and (first and second generation) newly industrialized economies in this region. It seems interesting to find out whether these economies reacted in similar ways to the phenomena in question or whether each of them chose an individual path of growth in exports, related to its unique commodity structure of exports against the other economies.

The first part of the study provides a concise background on the shifts in the positions of China, Japan and newly industrialized economies among the world's leading exporters. Part two provides an empirical insight into the changes of commodity structure, prices, and exports volume and total value in selected countries. The last part presents findings and conclusions.

The study covers, in general, the years 2000–2011 but the data for 2012 was also used where available. UNCTAD data was used as the main source of primary data (unit value indices, prices of manufactured goods, and exports volume and value). The study refers also to the literature on the subject addressing these problems.

## **2. Japan, China and newly industrialized Asian economies in international trade**

Asian economies, including East Asia, have recently become significant players in the world economy, mostly owing to the dynamic economic growth in China and newly industrialized economies (NIEs). All these countries, as well as Japan, traditionally related to economic success, share additionally common Asian values, increasing interdependencies and economic complementarity.<sup>2</sup> In the literature exploring economic growth in Asian countries, three growth models are distinguished: the Japanese model path of growth, first-tier NIEs and second-tier NIEs. China's own path of growth may be considered as the fourth generation of East Asia growth models.<sup>3</sup>

As far as the position of the analysed countries in the world export in the 21<sup>st</sup> century is concerned (see Table 1), the most striking phenomenon to be observed is Japan's dramatically shrinking share in the global exports, from 7.5% in 2000 to mere 4.4% in 2012. On the other hand, a different picture can be drawn for China that has recently become one of the major growth centres in the world trade. It is

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<sup>2</sup> B. Skulska, *Regionalizm ekonomiczny Azji Wschodniej*, Wydawnictwo Uniwersytetu Ekonomicznego we Wrocławiu, Wrocław 2012, pp. 12, 13.

<sup>3</sup> E. Oziewicz, *Dylematy rozwoju gospodarczego krajów Azji Południowo-Wschodniej na tle procesów globalizacyjnych*, Wydawnictwo Uniwersytetu Gdańskiego, Gdańsk 2007, pp. 67, 68.

China's economic openness and its strong focus on trade with foreign partners, which has led to this success. In 2009 China became the world's leader in export while in 1996 the country was not even classified among the top 10 global exporters. In the years 2000–2012 China's share in the global exports nearly tripled (from 3.9 to 11.2%).<sup>4</sup>

**Table 1.** The role of selected Asian countries in the global exports in the years 2000–2012 (in %)

Country	2000	2002	2004	2006	2008	2010	2012
China	3.87	5.01	6.44	7.99	8.86	10.32	11.18
Japan	7.44	6.42	6.14	5.34	4.84	5.04	4.36
Newly industrialized economies	14.50	13.56	13.38	13.08	12.09	13.70	13.36
Republic of Korea	2.67	2.50	2.75	2.69	2.62	3.05	2.99
Singapore	2.14	1.93	2.16	2.24	2.09	2.30	2.23
Hong Kong	3.14	3.11	2.88	2.66	2.29	2.62	2.69
Taiwan	2.34	2.08	1.98	1.85	1.58	1.80	1.64
Thailand	1.07	1.05	1.04	1.07	1.10	1.26	1.25
Indonesia	1.02	0.91	0.77	0.85	0.86	1.03	1.04
Malaysia	1.52	1.45	1.37	1.33	1.24	1.30	1.24
Philippines	0.59	0.54	0.43	0.39	0.30	0.34	0.28

Source: *UNCTAD Statistical Database*, <http://unctadstat.unctad.org> (retrieved 27.04.2013).

Newly industrialized Asian economies were first defined as a separate group in the socioeconomic classification in the 1970s. This classification serves the analytical and statistical purposes of the literature on the subject and the needs of various international organisations. Initially this group of economies was known as newly industrialized countries, and only later was the term newly industrialized economies coined.<sup>5</sup>

What all the countries classified in this group have in common is a similar structure of the economy and a high long-term growth rate. The sources of this success can be traced to the consistent implementation of the development strategy, supported to a large degree by the government's interference. This strategy was initially based on import substitution, which was later replaced by export expansion (an export-oriented development strategy). As a consequence of these efforts, the

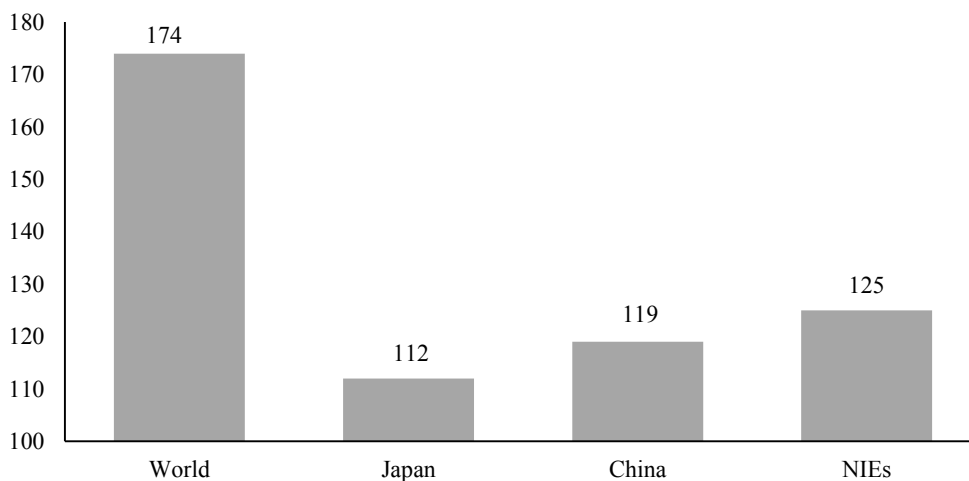
<sup>4</sup> The economy grew to some degree at the expense of other Asian economies. For more on the topic see: D. Greenaway, A. Mahabir, C. Milner, *Has China Displaced Other Asian Countries' Exports?*, University of Nottingham, July 2006.

<sup>5</sup> The purpose of this redefinition was to avoid China's protests against classifying Taiwan as an independent country, P. Deszczyński, *Konceptualizacja pojęcia stosunki międzynarodowe i kraje rozwijające się*, [in:] P. Deszczyński (Ed.), *Kraje rozwijające się w stosunkach międzynarodowych*, Wydawnictwo Wyższej Szkoły Bankowej, Poznań 2012, p. 29.

commodity structure of exports in newly industrialized economies has been dominated by manufacturing goods. According to UNCTAD, we can distinguish between the first-tier NIEs (South Korea, Singapore, Hong Kong and Taiwan) and second-tier NIEs (Indonesia, Malaysia, the Philippines and Thailand). Their total share in the world export was relatively stable between 2000 and 2012, ranging from 12 to 14%.

### 3. Commodity structure of exports versus the growth rates of export unit value

The 21<sup>st</sup> century has witnessed moderate pace of changes in the prices of manufactured goods. Between the years 2000 and 2011 those prices increased by 36% in the global export while the group of developing economies alone reported a rise of only 17%. It is noteworthy to observe this very moderate price movement, not only against a simultaneous dramatic rise in the prices of primary commodities (which approximately tripled in that period) but also as compared to the average price rises (of 74%) in the global export (see Figure 1).



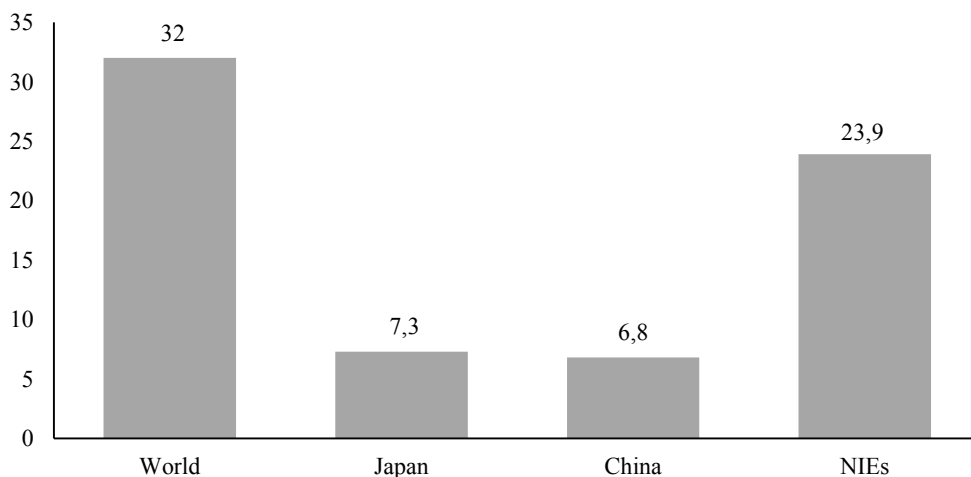
**Figure 1.** Unit value indices of exports in selected Asian economies in 2011 (2000 = 100)

Source: *UNCTAD Statistical...*

In the light of these observations, it should be of no surprise that the nominal price rises in China's export in the years 2000–2011 (2000 = 100) amounted to merely 19%, whereas in Japan – to only 12%. In the newly industrialized economies, on the other hand, the price rises were much more significant – the prices increased by as much as 25%.



These differences in the dynamics of changes in export prices correspond clearly with the data presented in Figure 2 which summarises the share of resources and food in the total exports of the countries analysed. Economies with low shares of primary commodities, i.e. China and Japan, reported very moderate growth rates of their export prices. Newly industrialized economies, where primary commodities account for nearly 25% of exports, on the other hand, reported much higher growth rates in their export prices. It should be emphasised here that the commodity structure of exports in the latter group of countries underwent significant changes in the period of analysis; the share of primary commodities doubled (from approx. 12 to 24%) whereas the share of manufactured goods fell by 12 percentage points in absolute terms (see Table 2). In this context it seems, therefore, particularly interesting that in the same period the commodity structure of China's export changed in the opposite direction – manufactured goods increased their share from 88 to 93.3%.



**Figure 2.** The share of primary commodities in total exports in selected Asian economies in 2011 (in %)

Source: *UNCTAD Statistical...*

It can be, therefore, concluded that whereas the newly industrialized economies might have made certain attempts to adapt to the changes imposed by the new price relations, China consistently promoted its mono-export of manufactured goods. It should be also mentioned that Japan – owing to natural constraints such as scarce mineral resources or barriers to agricultural development – was unable to react in such a flexible way as the NIEs which were rich in natural minerals and had much potential for development of various agricultural industries.<sup>6</sup>

<sup>6</sup> The active agricultural policies focused on the agricultural processing industry followed by Malaysia, Indonesia and Thailand are good examples. Cf. e.g. K.S. Jomo, M. Rock, *Economic Diversification and Primary Commodity Processing in the Second-Tier South-East Asian Newly Industrializing Countries*, UNCTAD Discussion Papers no. 136, June 1998, pp. 34–38.

**Table 2.** Commodity structure of exports in selected Asian countries in the years 2000–2011 (in %)

Country	2000		
	Agricultural products <sup>a</sup>	Mining products <sup>b</sup>	Manufactured goods <sup>c</sup>
China	6.6	5.3 (3.2)	88.0
Japan	1.0	1.8 (0.3)	93.8
Newly industrialized economies	5.1	7.6 (5.3)	86.5
	2011		
China	3.5	3.3 (1.7)	93.2
Japan	1.4	5.9 (2.0)	88.0
Newly industrialized economies	7.4	16.5 (11.3)	74.3

<sup>a</sup> SITC 0 + 1 + 2 – (27+28) + 4.

<sup>b</sup> SITC 27 + 28 + 3 + 68+ 667 + 971, figures for fuels provided in brackets.

<sup>c</sup> SITC 5 to 8 less 667 and 68.

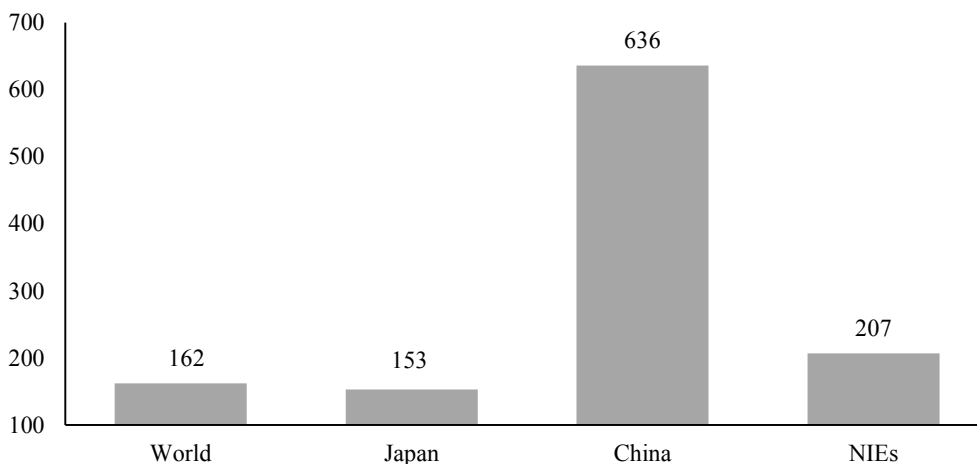
Source: *UNCTAD Statistical...*; *UNCTAD Handbook of Statistics 2012*, United Nations, New York–Geneva 2012.

#### 4. Volume as a factor of exports

The analysis of the second essential factor determining the total value of exports and its dynamics in a country or region, i.e. exports volume, provides an entirely different picture (see Figure 3). China – where export prices rise very slowly – reported a spectacular growth rate in its exports volume (which increased more than six-fold). At the same time, the newly industrialized economies also performed much better than the world average (their exports volumes more than doubled).

Japan's growth in exports volume, on the other hand, was rather moderate and amounted to only 53%. It should be reminded in this context that the country suffered also from the slowest – in the group of economies analysed – increase in export prices. This very slow growth in Japan's exports volume is related to the impact of a variety of factors which have already been carefully explored in the literature on the subject. Apart from the above-mentioned supply shortages, the following other determinants can be identified: relatively high labour costs, limited potential for improvements in labour productivity, unfavourable composition of workforce, extremely high level of national debt, deflation, etc.

China's economic situation in this dimension is entirely different. The country's strategy of minimum costs of exports, supported by an appropriate exchange rate policy, enabled a very dynamic growth in exports volume. As such, it offset to a large degree the very slow price rises in exports. As a result, the highly competitive Chinese exports boomed at the expense of other Asian economies, particularly those more industrialized (Japan and several newly industrialized economies). It should be



**Figure 3.** Exports volume indices in selected Asian economies in 2011 (2000 = 100)

Source: *UNCTAD Statistical...*

also mentioned here that China – owing to its significant role in the global export – contributed also to the relative slowdown in the growth of the global prices of manufactured goods. As should be emphasised in this context, according to preliminary estimates, the export unit value index for manufactured goods in developing countries fell in 2012 (year 2000 = 100) by 4% in absolute terms, which is below the 2000 figure, whereas in developed countries a 45-percent rise was reported at the same time.<sup>7</sup>

Moreover, it is noteworthy to observe that the process of gradual deterioration in the price relations to the disadvantage of the developing countries – within exports of manufactured goods alone – has been observed for a long time now. For instance, the period between 1975 and 2005 witnessed a gradual fall in the prices of manufactured goods exported by developing countries in relation to export prices observed in industrialized countries (by as much as 0.96% annually).<sup>8</sup> This process is defined in the literature as secular decline in manufacture – manufacture terms of trade of the developing countries vis-à-vis the developed countries.<sup>9</sup>

Interesting findings are provided by the analysis of changes in the exports volume in newly industrialized economies. This group – as already mentioned – reported an above-average volume index as compared to the world as a whole. Although these countries were affected by similar objective barriers as Japan, which impeded a more

<sup>7</sup> *UNCTAD Statistical...*

<sup>8</sup> S. Chakraborty, *Manufacture Exports of the Developing Countries and their Terms of Trade vis-à-vis the Developed Countries: Is Industrialization of Developing Countries an “Escape Route” from Prebisch-Singer Hypothesis?*, [http://courses.umass.edu/econ797arpollin/Manf\\_Manf\\_Tot.pdf](http://courses.umass.edu/econ797arpollin/Manf_Manf_Tot.pdf) (retrieved 27.04.2013).

<sup>9</sup> *Ibidem*, pp. 26–29 in particular.

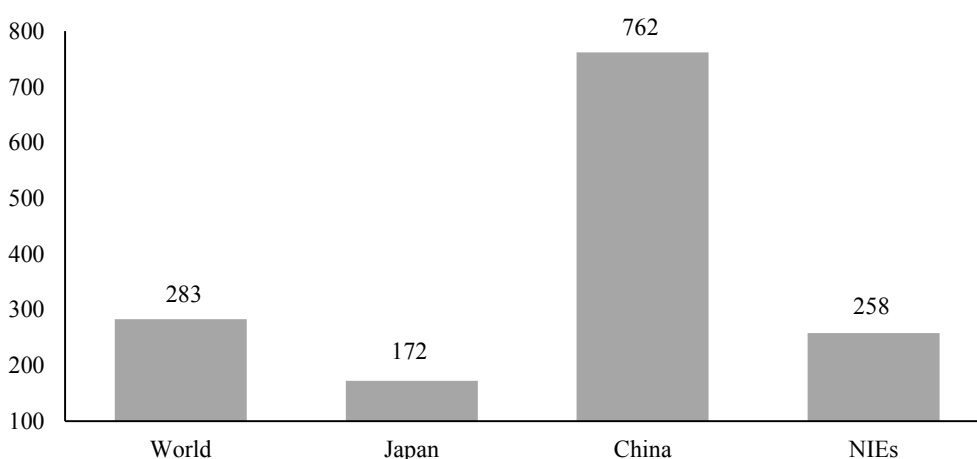
dynamic growth in volume (relatively high level of development, relatively high labour costs in certain countries), on the other hand, they also made attempts to adapt to the new price relations, which translated into changes in their commodity structures of exports. Nonetheless, even though these shifts in the structure were to a certain degree initiated – spontaneously – by strong changes in the price relations in favour of primary commodities, it is beyond doubt that these economies enjoyed much more potential for growth in their exports volume than Japan.

To sum up this part of analysis, we may conclude that the path of growth adopted in the 21<sup>st</sup> century by newly industrialized economies is entirely different from both China's and Japan's paths.

## 5. Differences in the dynamics of changes in the total value of export

The data presented in Figure 4 reveals that it is exports volume which determines, as the major factor, the total value of exports and its growth rate. According to the data, the total value of the Chinese exports increased over the years 2000–2011 nearly eight times (value index of exports amounted to 762, 2000 = 100). It turned out that the record level of growth in the Chinese exports volume was able to more than offset the highly unfavourable (from the viewpoint of this country) price relations in international trade. Whether this practice may be continued in the longer future, is another issue, given the more and more significant barriers related to labour force, salary pressures, limited capacity for efficient interventions counteracting the appreciation of the Yuan and political tensions.

Japan, in turn, adopted an entirely different path of growth in its exports. The above-mentioned limits to economic growth – under unfavourable price relations



**Figure 4.** Value indices of exports in selected Asian economies in 2011 (2000 = 100)

Source: *UNCTAD Statistical...*

and commodity structure – translated into a much less dynamic growth (of only 73%) in the country's exports in the period of analysis, and as a result the country's share in the global exports continued to shrink (by more than 3 percentage points).

In the case of the newly industrialized economies it may be argued that their paths of growth proved to be profitable. In spite of generally unfavourable price relations (the prices in exports were rising three times slower than the world average), these countries reported a similar growth in their exports as the world average (see Figure 4). Particularly good performance was observed for the countries which managed to either increase the share of primary commodities in their exports (such as Thailand – to more than 30%, and Indonesia – to more than 65%) or significantly reduce the high share of manufactured goods (e.g. Singapore and South Korea – by 17 and 5 percentage points, respectively); as a consequence their share in the global exports remained stable or even slightly increased.

## 6. Conclusions

The investigation presented in this study leads to the following conclusions of general nature. The new price relations observed in international trade in the 21<sup>st</sup> century were found to be unfavourable – for obvious reasons – to Asian economies whose exports were dominated by manufactured goods. Individual reactions to those trends, however, varied with each country; these countries followed different paths of growth in their striving for economic growth and development of export potential.

China's path was founded on the mass production and price competition, which boosted the country's exports volume. This noticeable growth in exports volume, in turn, more than offset the unfavourable price relations. Japan's path, on the other hand, involved certain inertia – forced by the impact of the factors which impeded a more dynamic growth. In practice, it meant that the country was unable to counteract the effects of unfavourable price relations. And lastly, the path of growth adopted by the newly industrialized countries, which can be considered as a middle one, showed certain flexibility and attempts to adapt to the new situation. It resulted from a clear shift in the commodity structure and attempts to overcome barriers to development (e.g. the government's active policy in the agricultural processing industry).

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## ŚCIEŻKI ROZWOJU EKSPORTU WYBRANYCH KRAJÓW AZJATYCKICH W XXI WIEKU

**Streszczenie:** W opracowaniu przedstawiono ocenę wpływu nowych relacji cen na zmianę pozycji w eksporcie światowym wybranych krajów azjatyckich. Zwrócono uwagę na szczególne znaczenie struktury towarowej eksportu krajów o wysokim poziomie uprzemysłowienia, takich jak Japonia, Chiny i kraje nowo uprzemysłowione. Przeprowadzone badania wskazują, że wymienione kraje w różny sposób zareagowały na wystąpienie nowych relacji cenowych w gospodarce światowej. Kluczową rolę odegrały możliwości elastycznego dostosowania się przez dany kraj do tego zjawiska poprzez zmianę struktury towarowej eksportu oraz zwiększenie dynamiki jego wolumenu. W konsekwencji można więc wyodrębnić trzy odmienne „ścieżki” rozwoju eksportu dla Japonii, Chin i krajów nowo uprzemysłowionych.

**Słowa kluczowe:** kraje Azji Wschodniej, handel międzynarodowy, struktura towarowa eksportu, ceny światowe.