Textile and Clothing Trade: comparing multilateral agreement to regional FTAs

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Summary

For the last ten to fifteen years, contrary to what had happened in the sixties and seventies, world trade in textile and clothing has shown a strong tendency to develop along regional lines rather than through intercontinental trade. This regional trend was both the result of specific regional trade agreements like CBI and NAFTA in America, or the "accord d'association" with Mediterranean countries or Eastern European countries, as well as from the Multi-Fibre Agreement (MFA), and of evolving comparative advantage in Asia between Japan, the former first wave of NIE's (Hong Kong, Korea and Taiwan) and the second wave (China and South-East Asia) or third wave of NIC (Vietnam, South Asia).

The dismantling of the Multi-Fibre Arrangement by year 2005 and China's forthcoming membership of WTO, as the world's largest exporter of clothing, will alter profoundly international competition in textiles and clothing. A simulation of these two components of trade liberalisation using the GTAP5 system makes it possible to identify the broad scale of these two shocks.

As decided by the Marrakech Agreement on Textile and Clothing (ATC) we test two scenarios of trade liberalisation:

Quotas suppression except for China,

Quotas suppression with China included,

We compare these results when using alternatively GTAP4 and GTAP5,

Then we analyse the potential for a pan-Euro-Mediterranean strategy compared to an FTA between Latin American Countries and NAFTA,

The main results of multilateral liberalisation (ATC) are that only big Asian countries are expected to gain from liberalisation among developing countries, their gains will have a positive effect on other local neighbouring economies whereas most other developing areas from Latin America to Africa and South Asia (except India) are expected to loose. The gains for developed countries occurring from a larger access to big Asian markets are also low.

On the contrary regional agreement have a positive effect on Mediterranean countries and Latin America but as they have small effects on global trade creation and therefore on global

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[1] This paper is an extension of a study made with the co-operation of the "Institut Français de la Mode" with a view to give Textile professionals a view on the use of MEGC to evaluate the consequences of trade liberalisation schemes in textile and clothing industries.

welfare, the dominant effect is trade diversion. The question is whether and how the MEGC could correctly capture the trade liberalisation effect on trade creation.
Another question is on poverty reduction: as the winners of multilateral liberalisation are the big Asian countries and middle income countries, does this support the creation of regional reciprocal trade agreements?

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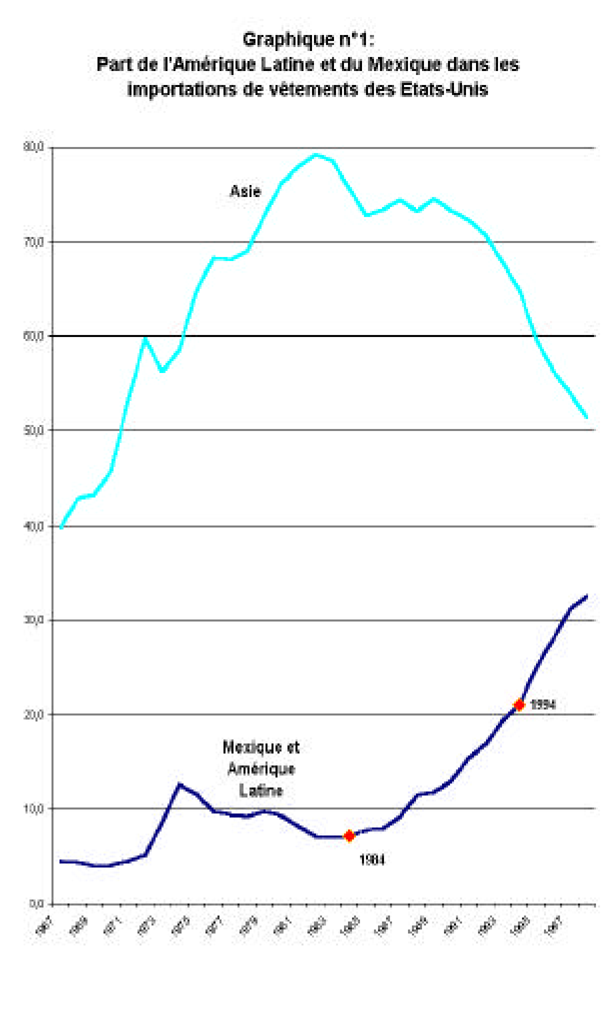
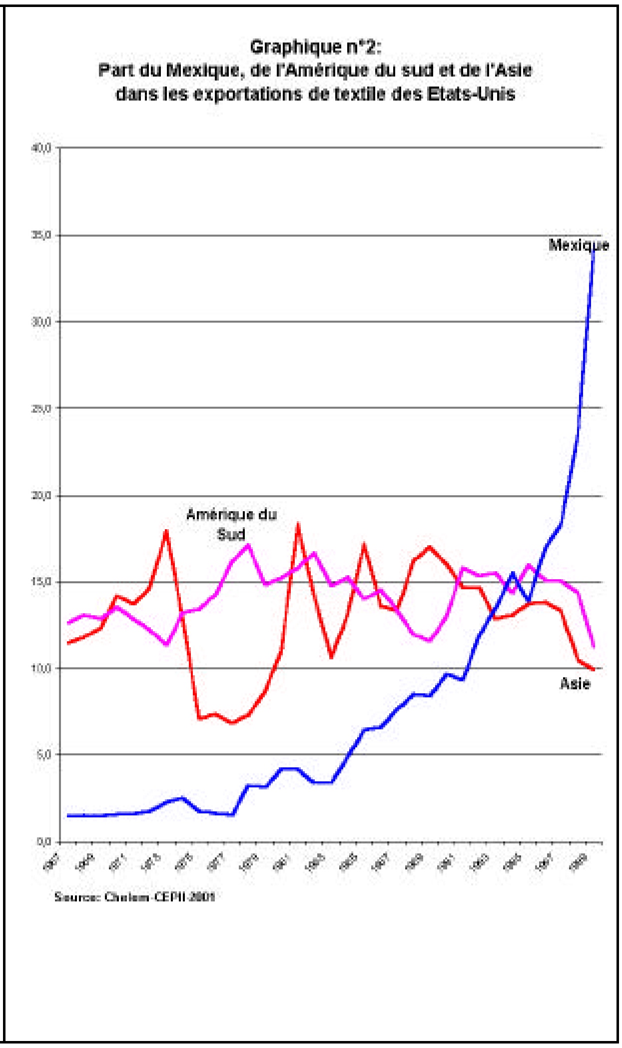
NAFTA as an example of regionalisation

As can be seen from graph 1 & 2 NAFTA played a major role in the development of regional integration : Mexico became in 1999, with 8 billions dollars and 13,5% (15% in 2000) of US imports, the first exporting country to US . Its value doubled between 1996 and 1999. Progress made by Mexico was accompanied by a similar increase in US textile export to Mexico achieving 34% of total US exports in 1999 (twice the level of 1996) or 2,4 billions dollars (which nevertheless stagnate in absolute terms). Success by Caribbean countries is less clear. As a consequence US textile industry benefit from a privileged access to the Mexican clothing industry which in return benefit from an easy access to the US market for clothing.

In parallel Asia clothing export share declined in spite of growing competitiveness from notably Chinese firms. The vertical division of labour between the US and Mexico has clearly had a positive impact on the development of Mexican industries and employment, but it may have been detrimental to Asia.



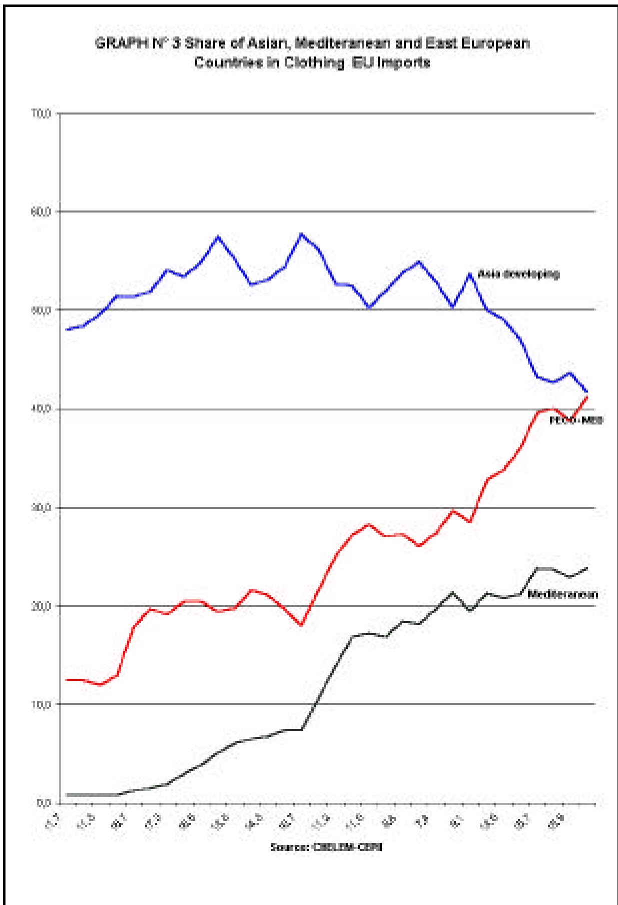


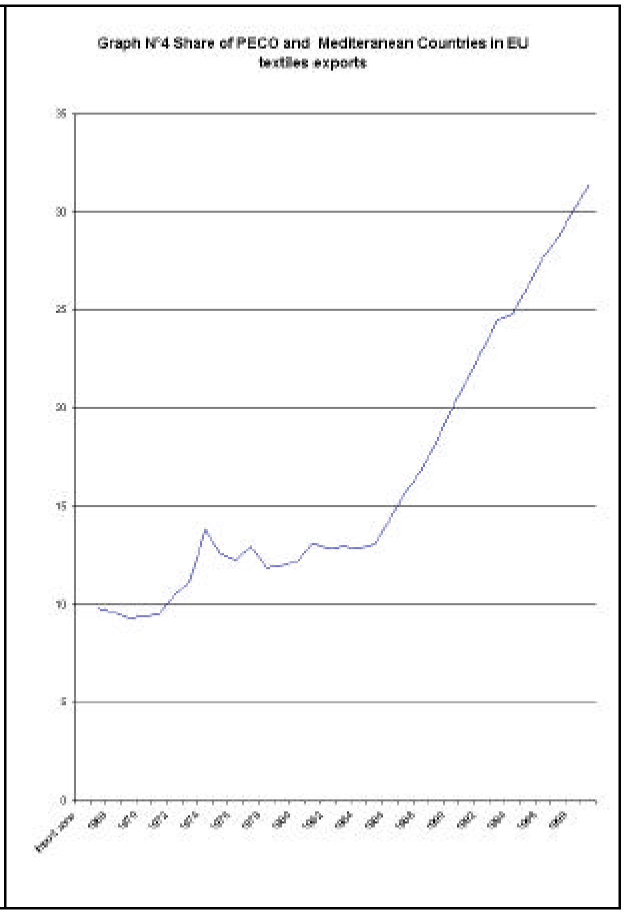
European regionalism

Similar but more complex trends can be seen in EU trade.

Preferential trade agreements have been put in place in the sixties between EU and Mediterranean countries and since 1989 between EU and the central European countries. In the last case the idea was to help Eastern European countries to achieved successfully their transition from a planed economic system to a market oriented one. In the case of textile clothing industry it took the form of an allocation of quotas under Passive Processing Trade (« Trafic de Perfectionnement Passif »). These quotas were progressively extended and finally disappeared, the quotas system was designed as to control for the development of intra-European trade which, some people feared, could have been disruptive at the beginning of the process as East European prices were not market prices. Such PPT quotas, which were attributed to products made from European textiles, have favoured countries neighbouring the

Union, as European importers were encouraged to work with nearby producers which also has the advantage to reduce delivery schedules and transport costs. This regional division of labor has helped West European industry to maintain its upstream industry and to improve its “revealed Comparative Advantage in textile”. Thus in 1988, for every US$ 100 worth of clothes imported from the Mediterranean basin and Central Europe, the EU exported US$55 to these countries in textiles and yarns.

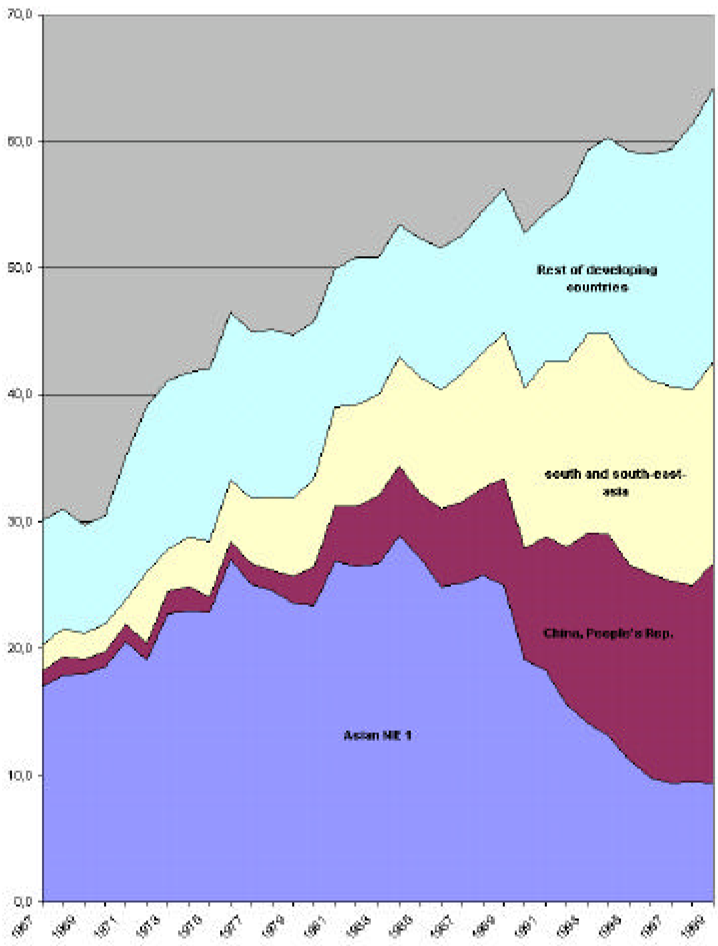




For Asian developing countries their share of world trade is stagnant since 1984 after a period of sharp increases, its share is almost decreasing since 1989. Within Asia regional agreements are still very limited. Japan has not been part of the Multi-Fibre Agreement so that the decline in Japanese textile and clothing industries has been very rapid in the past ten years. This has been profitable to Korean and Taiwanese textiles industry and to the Chinese clothing industry. That division of labour has been more in line with the traditional determinants of comparative advantage. High levels of industrial employment in Japan, and strong surplus in the external current account may have facilitated the management of the declining industry. But the banking crisis and Chinese entry in WTO are increasing trade conflicts between Japan and China. Japan tend to try to impose quantitative limits to the entry of some Chinese products.

The elimination of all discriminatory measures by 2005 as decide in the ATC will profoundly alter the rules of the game to which textile and clothing companies have adapted their strategies. Multilateral agreements reduce or even eliminate the basis for regional agreement. A priori the answer should be positive, but in reality governments tend to deploy more activity to negotiate regional agreements, should they be doing so only to give some work to their civil servants and economists? The reason stands in other area likes services, intellectual property where multilateral negotiations are proceeding slowly.

Graph n°5: Developing's Countries Share of World Trade in Clothing



Megc previous estimates

The analysis of the effects of current trade liberalisation in the textile and clothing sector requires interdependencies between countries and sectors to be taken into account. General equilibrium models are key to such work and many simulations are available. We start our research by comparing some of the most interesting results achieved through the use of different models and databases (see also Whaley 1999). The results are summarised in the next table.

Authors and data	***Main modelling Hypothesis***	***Welfare gains (billions US$)***
Trela and Whalley (1990) Data 1986 7 textile and Clothing quotas 7 textile and Clothing Tariffs	No consumer discrimination between Imported Goods and local goods	23 billions world gain 8 billions gains for developing countries most of these are winners
Harisson, Rutherford and Tarr (1995,1997) Data 1992 (GTAP 2)	Static model, constant return Pseudo-dynamic model	14 billions of which –2 for developing countries 20 billions gains of which +4 for developing countries China only winner
Hertel, Martin, Yanagishima &Dimaranan (1995) Dta 1992 (GTAP 2)	World economy estimated Year 2005 before liberalisation	37 Billions gains from quota 13 billions for tariff reduction Big Asian countries are the big winners
Yang (1997) Data 1992 (GTAP 2)	Static model with perfect competition	28 billions gains for the world 11 billions for developing Big Asian countries are the big winners
Yang (1994) Data 1986	Static model with perfect competition Quotas abolition only	7 billions gains for the world 3,7 for developing countries Nie's are the big winners
Francois, Glissman & Spinanger (2000)	Base Year projected for 1997	25 billions € gains for EU consumers

Data 1995 (GTAP4)		

At first the results seem to be very diverse. Such diversity arise from three principal reasons:

Differing data bases for different years

Estimates made on the value of obstacles are widely diverging as well as reduction hypothesis

Models differs.

The effects vary between 7 to 37 billions in terms of welfare gains

Quotas abolition generate more gains than tariff reduction. In most case the big Asian countries are the big winners, China first of all, in terms of production and exports.

European countries and the US are the biggest winners as they registered positive effect on terms of trade for consumers which effect overcome the negative effect on producers.

Regionalisation versus multilateralisation

We want to compare the multilateral result of elimination of quotas (ATC) to the interregional approach (FTA Agreements). Therefore three scenarios have been elaborated to simulate various possibilities.

Scenario 1 (SC1) is based on quotas elimination except for China as decided by the ATC

Scenario 2 (SC2) add the impact of elimination of quotas concerning China

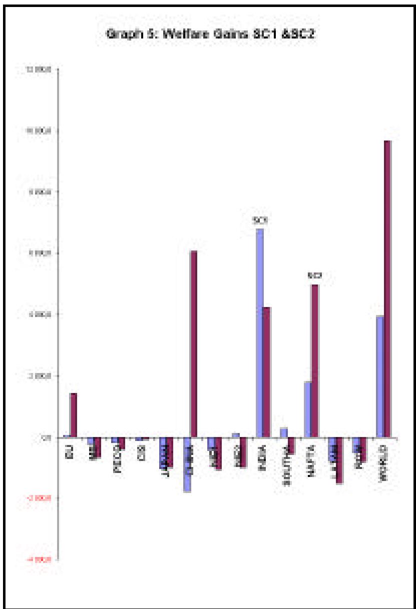
Scenario 3 (SC3) compares the effects of a European Union Mediterranean free trade agreement and of a Latin America-NAFTA FTA, limited to the textile clothing industries, hypothesis of SC2, i.e. ATC being included.

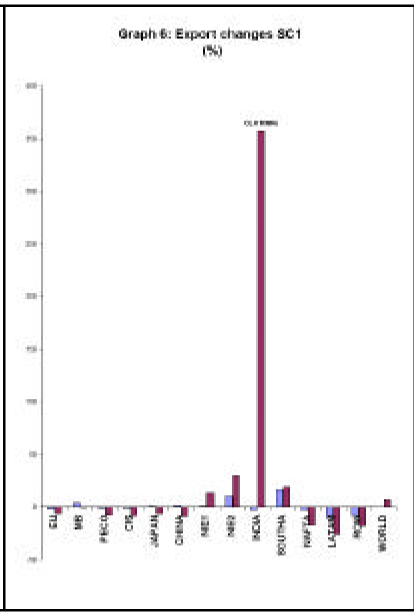
The simulations are carried out using Version 5 of the GTAP model (base year 1997), with 13 geographic zones and 7 sectors including textiles and clothing. The geographical breakdown has been chosen in order to reflect the vertical division of labour mentioned above: European

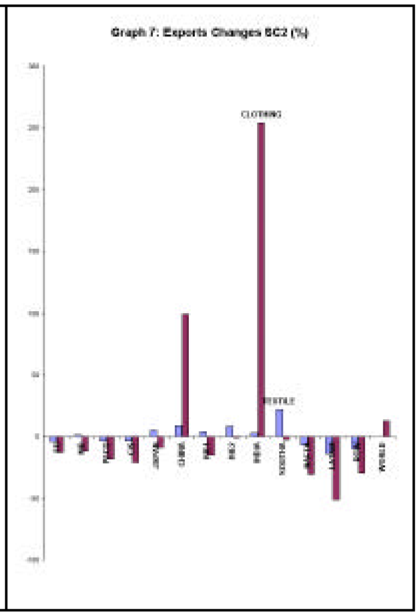
Union, Mediterranean countries, PECO, CIS, for the first group, Japan, China, NIE1 (the four dragons) and NIE2 (the four tigers), India and South Asia, for the second group, NAFTA and Latin America for the third group. We also make a comparison between some of these results of SC1 and 2 from Gtap5 to some of the results obtained with Gtap4.

Effects of quotas abolition without China (SC1)

The ATC, which came into force the 1st January 1995, is a transitional agreement that should lead to the complete abolition of quotas by WTO members, by 1st January 2005. The ATC includes two principal measures: first, the progressive integration of products concerned by the quotas in the general regime of the GATT; second the liberalisation of restrictions, in other words, the progressive rise in the growth of import quotas set out in the bilateral agreements concluded with the MFA framework. As far as China's membership of the WTO is concerned, it includes two dimensions: the opening of industrialised country markets to Chinese products (in this case, elimination of quotas) and the opening up of the Chinese market to products from other WTO members[2].







[2] See F. Lemoine, "Pourquoi la Chine veut-elle adhérer à l'OMC ?", *La Lettre du CEPII*, No 189, April 2000 (available in English on the CEPII web site: http://www.cepii.fr).

In terms of welfare India registered, by far , the biggest gains (more than six billions dollars), then comes NAFTA with a little less than 2 billions. The gains of India incurred through export expansion in clothing with a more than 350% increase and a small decrease in textile exports, South Asia and South East Asia (NIE2) increase their exports but only by, respectively, 19% and 30% in clothing, and by 17% and 10% in textile exports. Abolition of quotas improve the welfare of developing Asia through exports increase. Overall world exports in value terms do not increase much. For the clothing the increase is 7%. Lower prices translate into higher volume of export but not enough to overcome negative effects. This result can be considered as going against passed evidence which shows that international trade in clothing is one of the most dynamic in world trade: on average trade in clothing has been growing by 7% per year in constant $US during the last thirty years. Abolition of quotas would only have the effect of one year growth.

The welfare gains for NAFTA result from consumers gains that offset producers' losses through increase imports and a reduction in exports, as it was naturally expected. But constant budgetary shares do not allow for an increase in the value of consumption even if there is an increase in the import content and an increase in the quantities consume.

Latin America and other developing countries are loosing in terms of welfare as well as in terms of exports. Latin American countries are the main losers with a loss of 26% on their clothing exports and a loss of around one third on NAFTA, which is the second loser on intra-NAFTA trade, both to the main profit of India.

Effects of quotas abolition with China (SC2)

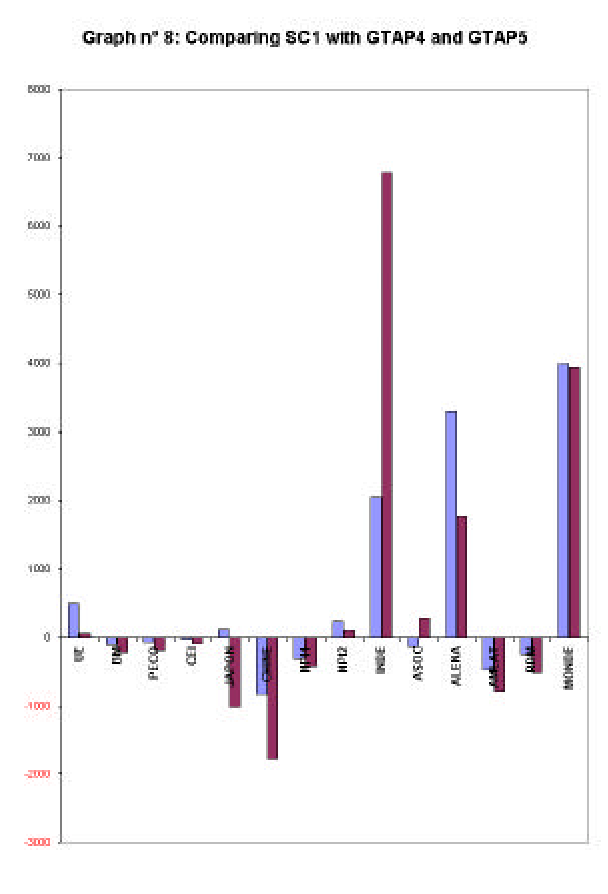
Before any quota abolition, and any WTO status for China that country was able to become by the first exporting country in clothing (17,5% in 1999 compare to 6,9% for Italy). China is also the first target of antidumping measures. As it has been noticed (Finger 1994) there is some paradox in the fact that it is the most successful country which is the main “victim “ of protectionism. Not surprisingly the impact of quota abolition is the strongest when it is applied to Chinese exports. Overall the welfare gains are more than twice the level achieved in SC1: almost 10 billions compare to 4 billions. The main winners are NAFTA and EU : NAFTA gains of SC1 are tripled and EU gains which were almost nil in SC1 became positive. What is more troubling is the fact that most developing countries are loosing in terms of welfare, except for India these countries are worse than before the abolition. India see its former gains of 7 billions reduce to a little more than 4 billions.

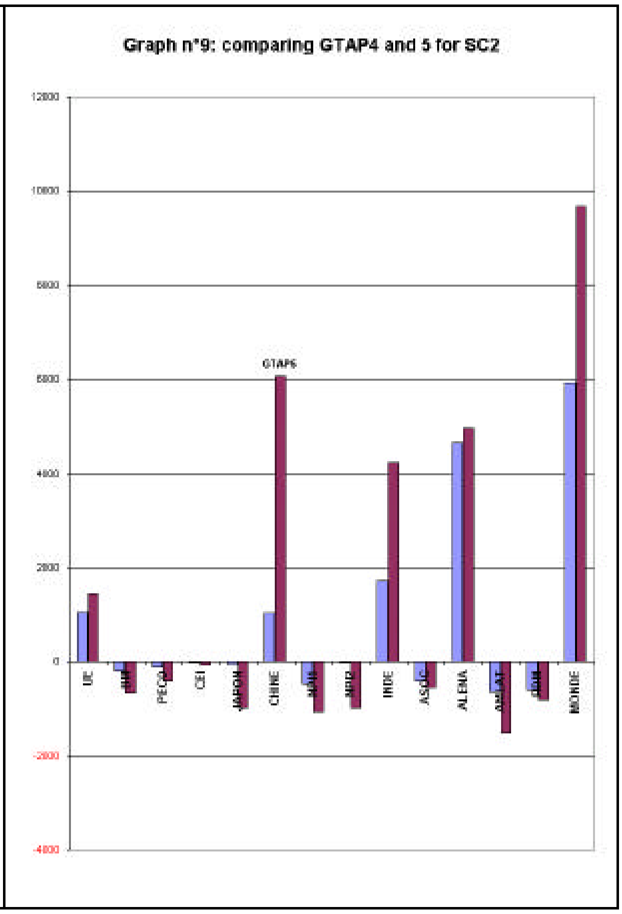
China doubled its exports, India exports increase is reduce from 350% to 250%. Latin American exports are reduced by 50% in clothing, and NAFTA loose 30%.

A few countries are successful in Textile exports : Japan (5%), China (9%) , NPIE1 (4%), NPIE2 (8%) and South Asia (22%), but this does not compensate for the losses occurring in the clothing exports. Overall world clothing exports increase by 13%, twice the increase registered in SC1. Latin America is still the biggest loser with a loss of 40% on the American markets (North and South). Chinese exports do not increase vis-à-vis developing countries whose protection remains constant.

Comparing GTAP4 GTAP5 simulations

The world welfare gains are similar for the two versions of GTAP, but the distributions are somewhat different. India welfare gains are 3.4 times higher in GTAP5 compare to GTAP4, this is the consequence of the new estimates of the export tax equivalent (see table below) which go vis-à-vis EU from 6,1 in GTAP4 to 12 in GTAP5 for textile, and from 9,2 to 15,2 for clothing. Vis-à-vis NAFTA the increases are small for textile from 8,9 to 9,6 but higher for clothing increasing from 25 to 33,8.





But these changes does not fully explain the new distribution of Welfare gains and losses. With bigger export tax equivalent one might expect bigger gains for the partners of India. De facto, almost all partners loose except South Asia. South Asia registered a similar increase of ETE between the two versions of GTAP. For the other region there is a decline in the evolution of ETE, and for that reason may loose in terms of market shares vis-à-vis EU and NAFTA.

The decrease in ETE can be the result of a real decrease in the effectiveness and level of the quotas between 1995 and 1997. On the contrary the increase of quotas or their economic cost for India and South Asia cannot result from changes in the real world, but are probably due to a change in the evaluating process. As documents on these issues are not yet available we can only make a guess (see also Francois, Spinnanger 2000).

Whatever the reason, this does not explain some other changes in the results. In particular the decrease in welfare gains for developed countries such as EU and NAFTA. These region do benefit from a decline in the costs of their imports which were higher than the costs of a decrease in production. In the GTAP5 version the decline in production must be stronger than the decrease in the import cost. Another guess.

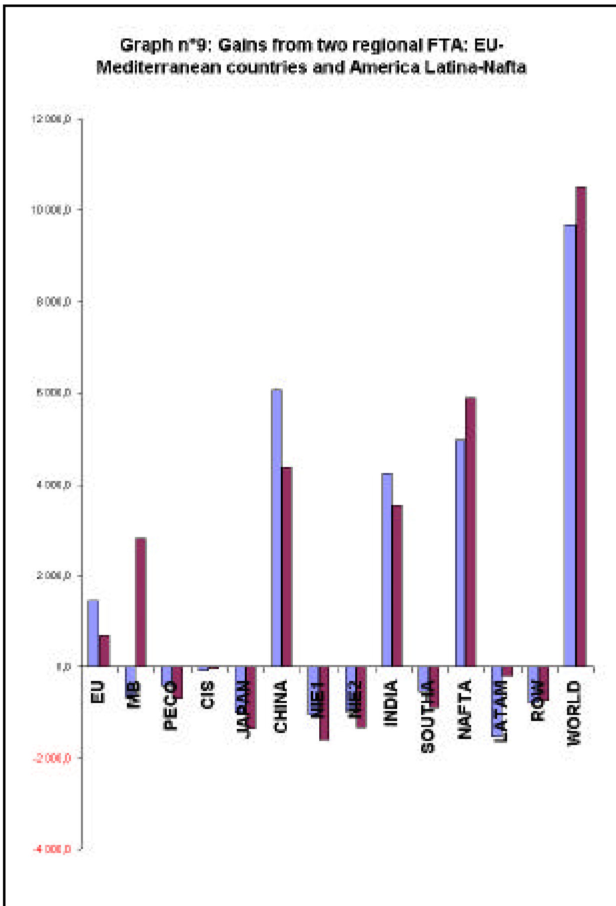
ETE GTAP 4 vs 5 (Export Tax Equivalent)					
	TEXTILE			***HABILLEMENT***	
	UE			***UE***	
	GTAP4	**GTAP5**		**GTAP4**	**GTAP5**
2 BM	-1,1	-1,7	2 BM	-1,1	-1,2
3 PECO	0	0	3 PECO	0	0
4 CEI	-0,2	-0,2	4 CEI	-0,1	-0,1
5 JAPON	0	-3,1	5 JAPON	0	-3,1
6 CHINE	-1,1	-12	6 CHINE	-4,7	-15
7 NPI1	-1,5	-0,9	7 NPI1	-4,2	-3,9
8 NPI2	-2,6	-6	8 NPI2	-6	-6,1
9 INDE	-6,1	-12	9 INDE	-9,2	-15,2
10 ASOC	-2,7	-8,1	10 ASOC	-2	-7,1
11 ALENA	-0,5	0	11 ALENA	-0,3	-0,3
12 AMLAT	2,4	4,3	12 AMLAT	-0,1	-2
13 RDM	3,3	2,9	13 RDM	1,3	0,2
	ALENA			***ALENA***	
	GTAP4	**GTAP5**		**GTAP4**	**GTAP5**
1 UE	-0,7	0	1 UE	-0,9	0
2 BM	-1,3	-5,7	2 BM	-0,7	-4
3 PECO	0	-6,7	3 PECO	-0,1	-5
4 CEI	-0,2	-0,3	4 CEI	-0,1	-3,1
5 JAPON	0	-3,1	5 JAPON	0	-3,1
6 CHINE	-5,8	-19,7	6 CHINE	-18,8	-32,7
7 NPI1	-2,2	-1	7 NPI1	-9	-6,6
8 NPI2	-3,6	-7	8 NPI2	-13	-8,8
9 INDE	-8,9	-9,6	9 INDE	-25	-33,8
10 ASOC	-4	-15,2	10 ASOC	-5	-8,2
12 AMLAT	0	2,7	12 AMLAT	-0,5	-0,4
13 RDM	5	2,5	13 RDM	1,7	1,6

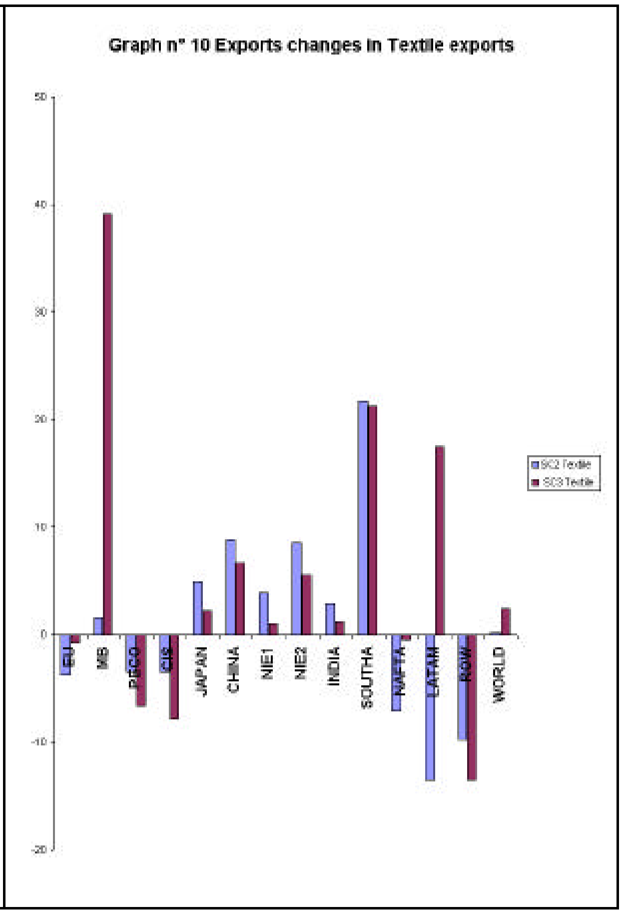
Coming to the SC2 comparison (graph n°9), the inclusion of China increase the world welfare in GTAP5 compare to GTAP4 by a significant amount: around 4 billions US$ more than the 6 billions of GTAP4.

The changes are dramatic for China which increases its welfare by 5 billions. Estimations of ETE are also several times higher in the GTAP5 issue than in the GTAP4. Developed countries as EU and NAFTA have a positive but modest effect on their welfare. Japan is still loosing.

What is worse all developing countries loose and loose more in the GTAP5 issue than in GTAP4. As we have noticed above the losses originate in the loss of export shares mostly in clothing (see graph n°7). Latin America doubled its losses.

TWO REGIONAL FTAs: EU-MB and America Latina-NAFTA

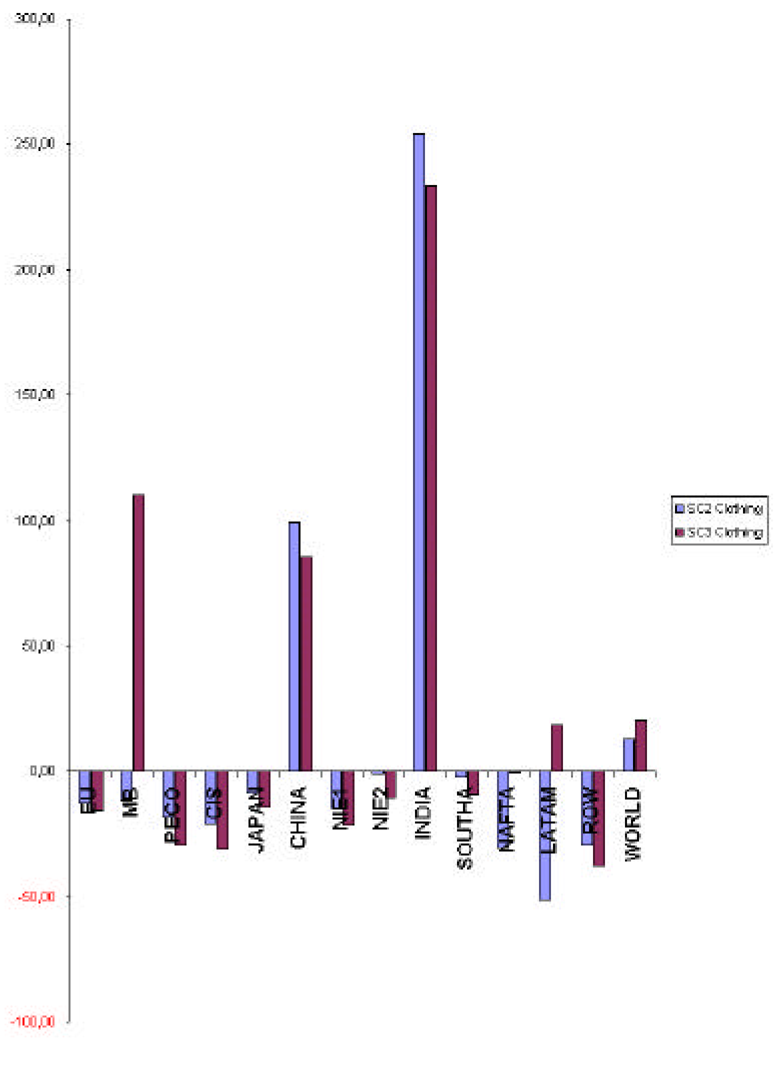




As seen in Bouët, Mondher (2001) there is a large array of all kinds of agreements between EU and its traditional partners whether they have been negotiated with close European partners or with former colonial countries from Africa, the Pacific or the Caribbean countries. These agreements notably with developing countries were non reciprocal agreements: European Union gave access to developing countries without reciprocity. The outcome of such a policy was, in fact, in most cases negative as the market share of these “preferred” countries in Europe continue to decline during the seventies and the eighties. A few exceptions were to be noticed notably in North Africa.

The Marrakech agreement imposes now that all bilateral agreements should be based on reciprocity. The fact was clear that many countries have maintained sky-high protection, with low transparency (no bounded rates) and high rate of corruption, making access to foreign inputs or equipment tremendously expansive. Preferential non reciprocal agreements as such must be banned in the coming years raising fears of further losses for poor countries (Fontagné, Perridy, and Bensidoun, Chevallier).

Graph n°11: Exports Changes in Clothing Exports



In fact the relative success of PECOs and Mediterranean countries in the nineties shows that freeing trade with European developed countries was helping the development of these countries. So the idea came that further regional liberalisation could improve the situation in a system of global liberalisation. In principle there are no tariffs between EU and most Mediterranean countries, but estimates by GTAP5 give a remaining 10,5% for Textile and 12,6% for Clothing tariffs equivalent.

On the side of Americas we found a very different story. The US were, up to 1985, reluctant to sign specific regional agreement and favoured multinational negotiations. On the contrary Latin American countries were engaged in a number of regional projects which up to the nineties do not produce convincing results. The major reason was that it's difficult to accept to reduce barriers to trade towards your closest partners while maintaining high barriers towards third countries: liberalisation movement have to proceed on parallel routes on regional as well as on multilateral levels. Once engaged in liberalisation then the progress made by regional negotiation gains credibility. Two years after the signing of NAFTA the American nations started to negotiate a FTAA which should start in 2005 and be achieved in ten years.

We try to measure the effects of the elimination of barriers to trade with SC3 (see graphs 9 and 10).

We cumulate ATC and Chinese entry to WTO with full liberalisation in T&C between EU and Mediterranean countries on one hand and between Latin America and NAFTA on the other hand. The results are compared to the SC2 outcome (full quota abolition).

Mediterranean and Latin American countries clearly improve their welfare compare to SC2. The gains are higher for the Euromed than for Latin America, they benefit both of accrued exports to EU and from an initial higher protected market.

What is more surprising is the fact that EU loose in terms of welfare contrary to NAFTA which registered significant gains.

In terms of exports Mediterranean countries have big gains both in textile (40%) and in Clothing (120%). Latin America wins 30% on textile and around 60% on Clothing. NAFTA exports improve much more than European ones.

Losers are all the other countries not only the two big exporting countries China and India. In fact the losses are important for the PECOs and CIS, showing that regional arrangements have to be designed carefully. In fact EU is preparing for the accession of Eastern European countries which will reverse the negative outcomes of SC3.

Conclusion

The main results of multilateral liberalisation (ATC) are that only big Asian countries are expected to gain from liberalisation among developing countries, their gains will have a positive effect on other local neighbouring economies whereas most other developing areas from Latin America to Africa and South Asia (except India) are expected to loose. The gains for developed countries occurring from a larger access to big Asian markets are also low.

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