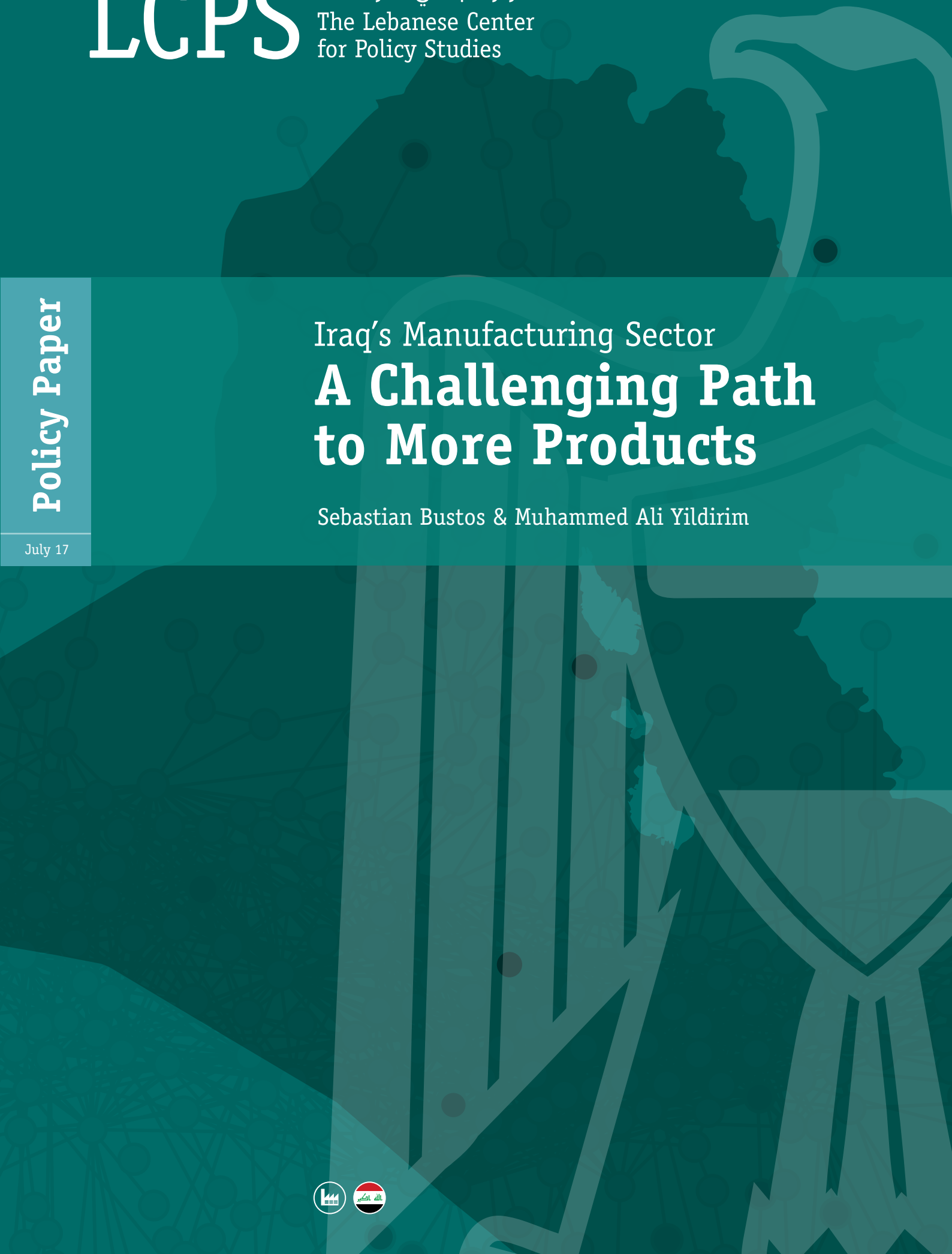
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Policy Paper

July 17

Iraq's Manufacturing Sector

A Challenging Path to More Products

Sebastian Bustos & Muhammed Ali Yildirim

Founded in 1989, the Lebanese Center for Policy Studies is a Beirut-based independent, non-partisan think tank whose mission is to produce and advocate policies that improve good governance in fields such as oil and gas, economic development, public finance, and decentralization.

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Iraq's Manufacturing Sector

A Challenging Path to More Products

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An overview of Iraq

Iraq's position in the product space is a difficult one. Given its limited diversification and strong dependence on oil, the methodology suggests that the country's future path for development should focus on new opportunities in the foodstuff and chemical clusters.[1] Table 1 lists the target sectors that the methodology identifies as those strategic for Iraq's future development.

The community with the greatest number of target products is the foodstuff cluster, with 22 products (HS2:16-24). The second cluster with the highest number of target products is chemicals & allied industries with a total of 13 products (HS2:28-38), which is somewhat expected for a big oil producer. The methodology also identifies five products in the textile community, and four in the plastics/rubbers cluster (HS2:39-40). While products in the foodstuff community are closer in distance in terms of productive knowledge and capabilities of the country, the products in the chemicals & allied industry have a higher Product Complexity Index (PCI). Therefore, developing them would have a larger impact on Iraq's average complexity. As can be seen in the table, the country currently has almost no presence in any of the target communities.

1
Please see the introduction for a detailed methodology. http://www.lcps-lebanon.org/publication.php?id=294&category=900&year=2017

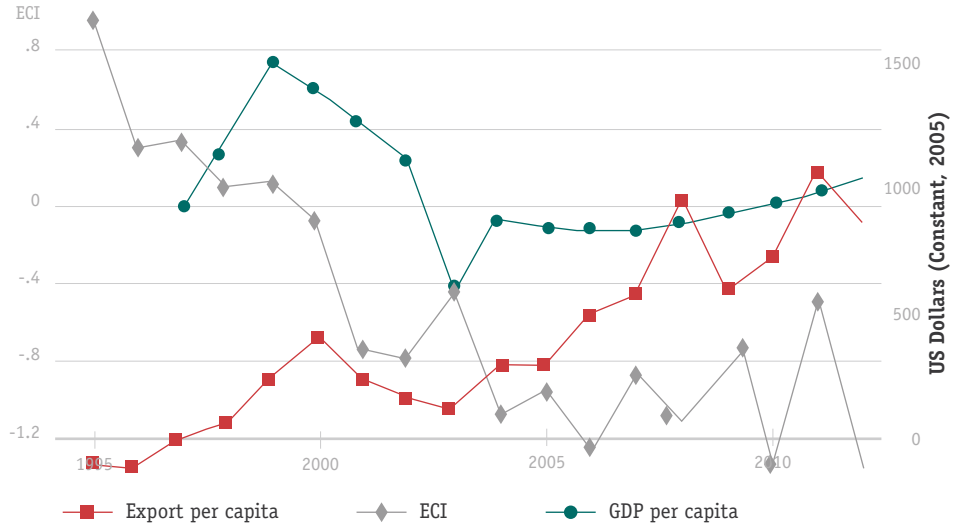
Table 1 **Summary of target sectors**

HS2	Product name	Product Targets	Product World Exports ($)
39	Plastic and Articles Thereof	5	528 B
33	Oils and Resinoids, Perfumery, Cosmetics	4	91 B
19	Preps. of Cereals, Flour, Starch or Milk	4	56 B
21	Misc. Edible Preparations	4	57 B
22	Beverages, Spirits and Vinegar	4	103 B
32	Putty and Inks, Dyes, Pigments, Paints and Putty	3	74 B
63	Made-Up Text. Articles Nesoi, Needlecraft Sets, Worn Clothing, Rags	2	51 B
24	Tobacco and Manuf. Tobacco Subs.	2	40 B
17	Sugars and Confectionery	2	51 B
20	Preps. of Vegs, Fruits, Nuts, Etc.	2	50 B
90	Optical, Photo/Cinematographic, Medical Instruments and Accessories	2	488 B
23	Food Industries Residue and Animal Feed	2	72 B
84	Machinery and Mechanical Appliances, Computers, Boilers, Nuclear Reactors	2	1879 B
87	Vehicles other than Rail/Tramway Rolling Stock	2	1218 B
28	Inorganic Chem, Precious Metal Compounds, Isotopes	2	129 B
61	Articles of Apparel and Clothing Accessories Knited/Crocheted	2	188 B

HS2	Product name	Product Targets	Product World Exports ($)
18	Cocoa and Cocoa Preps	2	42 B
34	Soaps, Waxes, Candles	2	53 B
30	Pharmaceutical Products	1	462 B
94	Furniture, Bedding, Lighting, Prefabricated Buildings	1	183 B
31	Fertilizers	1	47 B
52	Cotton, Yarns, Woven Fabrics Thereof	1	61 B
35	Albuminoidal Sub, Starches, Glues, Enzymes	1	26 B
62	Articles of Apparel and Clothing Accessories - Not Knitted/Crocheted	1	188 B
29	Organic Chemicals	1	445 B

K = thousand, M = million, B = billion

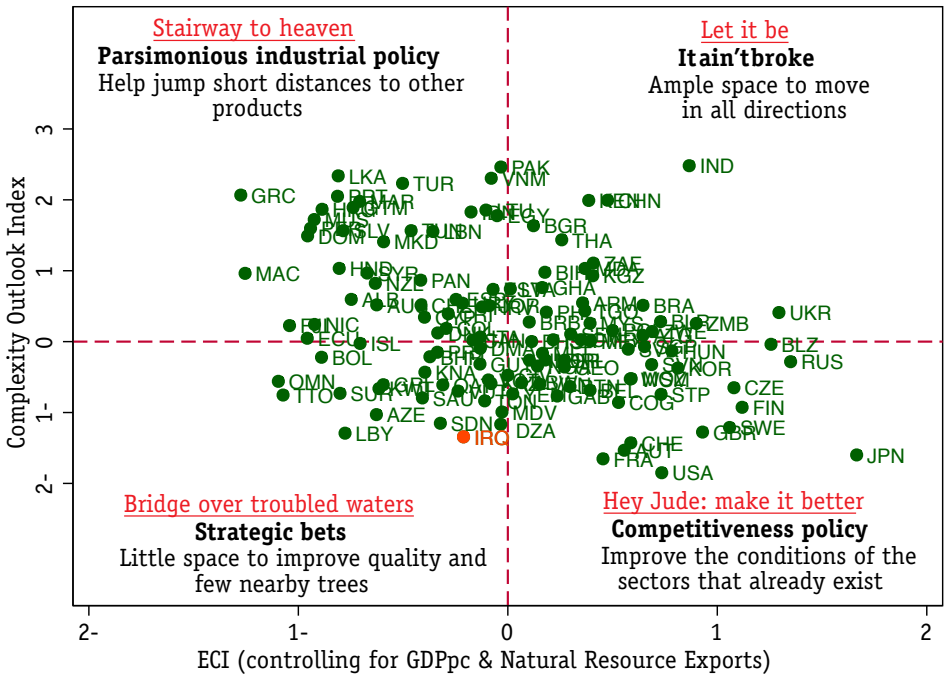
Figure 1 **Evolution of Iraq's complexity, GDP and exports**



Note **Own calculation using HS4-level trade data from United Nations COMTRADE, and the World Development Indicators from the World Bank Database.**

Iraq has been in a state of war for many years, a situation that is clearly reflected in the GDP per capita of the country (figure 1). Its exports per capita, on the other hand, increased significantly from 1995 to 2012. Most notably, Iraq's Economic Complexity Index (ECI) has fallen from 0.8 in 1995 to -1.3 in 2012, indicating that the average complexity of Iraq's products has decreased. This is largely due, as will be demonstrated below, to the fact that its integration with the rest of the world has been limited due to Iraq exporting only oil.

Figure 2 **Summary of Iraq in the product space**



Note **Own calculation using HS4-level trade data from United Nations COMTRADE, and the World Development Indicators from the World Bank Database.**

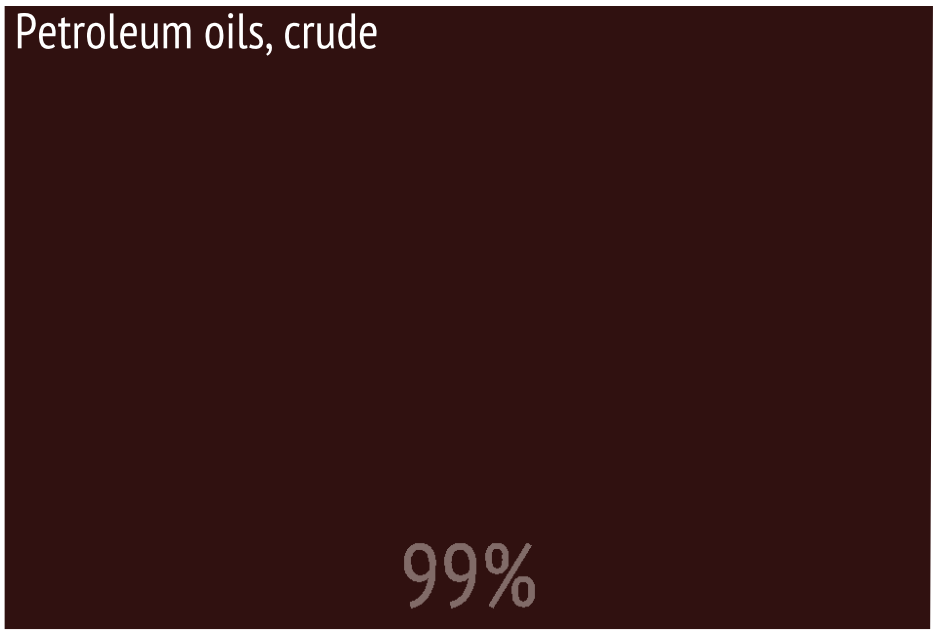
Given that Iraq has not reported some data after 2009, the figures above use data gathered prior to that year. Iraq's complexity is a reflection of its oil exports, thus, after controlling for its level of income and its involvement in oil exports, it is expected that Iraq will be found in the middle of the x-axis, as is shown in figure 2. Moreover, when it comes to the ease of moving through the product space, the lack of Iraq's competitiveness in other sectors locates the country in the bridge over troubled waters quadrant of the figure. There is little space to gain complexity and move into new industries. It will require significant effort to develop sectors and become competitive in world markets without encountering market failures. Iraq requires the implementation of an industrial policy 'in the large' to ease the transition to new and more complex industries. In these cases, enhancing production possibilities around existing industries will not produce the leaps that are desired. Industrial policy should focus on selecting a number of new industries or products (strategic bets) at which to target public inputs. The aim of such support is to provide temporary public support that will attract and facilitate private investment in new products.

Iraq's productive structure

Iraq's exports are products of the state of an economy during war. Such an environment does not facilitate the development of industries competitive in world markets other than oil. Not surprisingly, Iraq's exports are 99% oil. Figure 3c shows the evolution of exports that reflect the effect of military interventions on oil export fluctuations and oil prices in world markets.

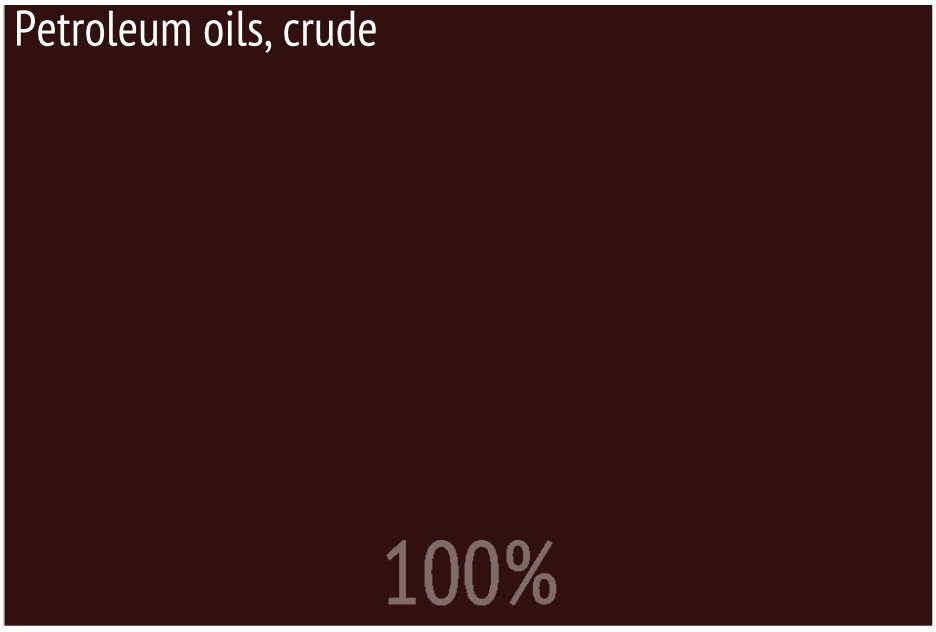
Figure 3 **Iraq's trade structure 2012 and evolution of its exports per capita of Iraq (1995-2012)**

a **Exports of Iraq**



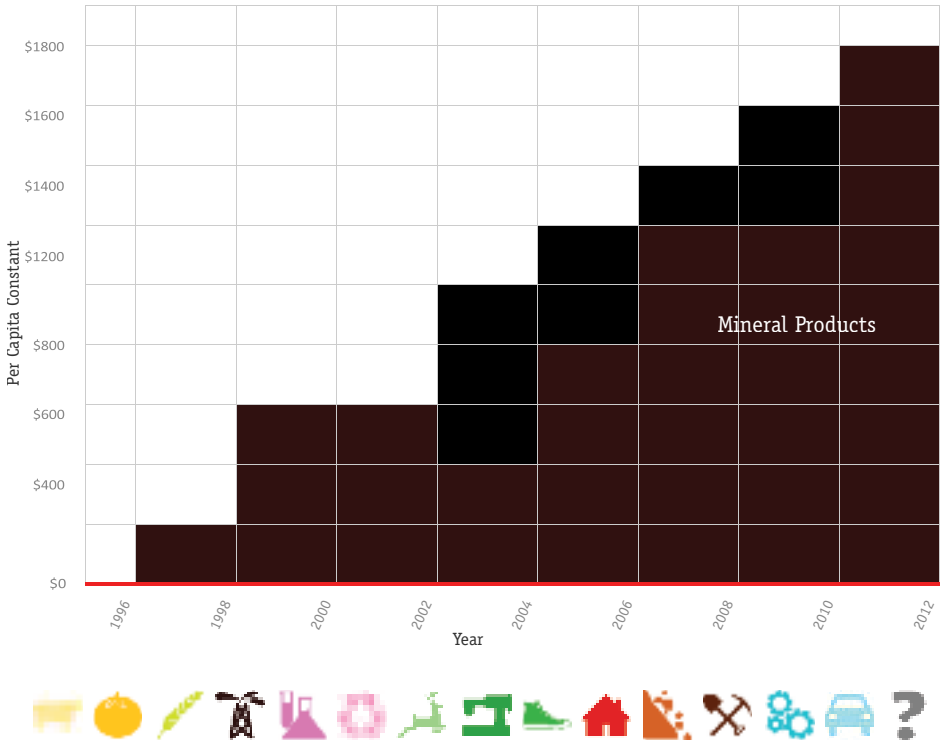
Iraqi exports totaling approximately $57.2 billion

b **Net exports of Iraq**



Iraqi net exports totaling approximately $57 billion

c **Evolution of exports**

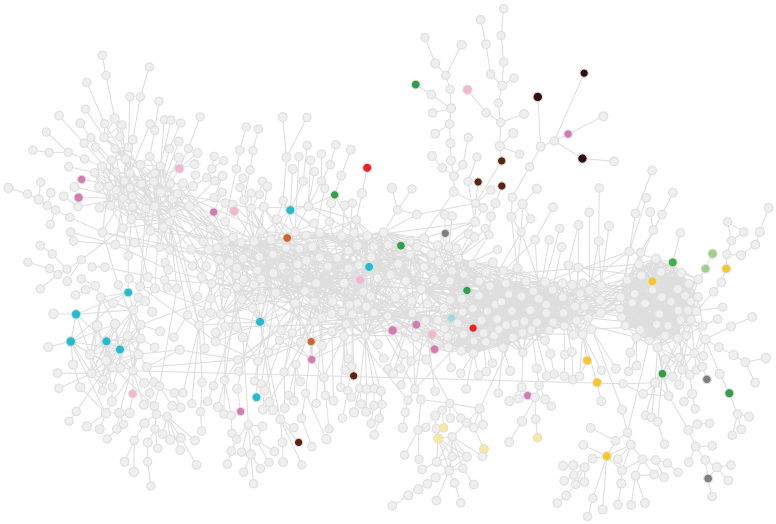


Note **Own calculation using HS4-level trade data from United Nations COMTRADE. Products are colored according to the communities that they belong according to the above legend.**

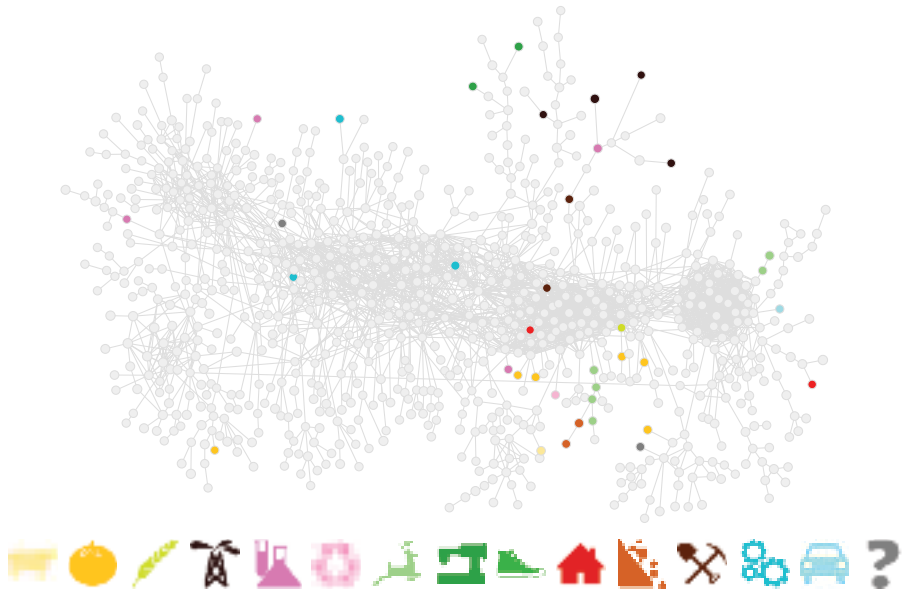
Figure 4a and 4b present Iraq's product space and its change from 1995 to 2012. The figures above show that Iraq's product space has very few competitive products other than oil (which accounts for 99% of exports). Additionally, the country mostly produces in the periphery of the product space, making knowledge accumulation more difficult. Although the 1995 product space was not greatly diversified, given the state of war that affects the country, it is not surprising that the number of competitive products (with RCA greater than 1) diminished from 1995 to 2012.

Figure 4 **Iraq on the product space**

a **1995**



b **2012**



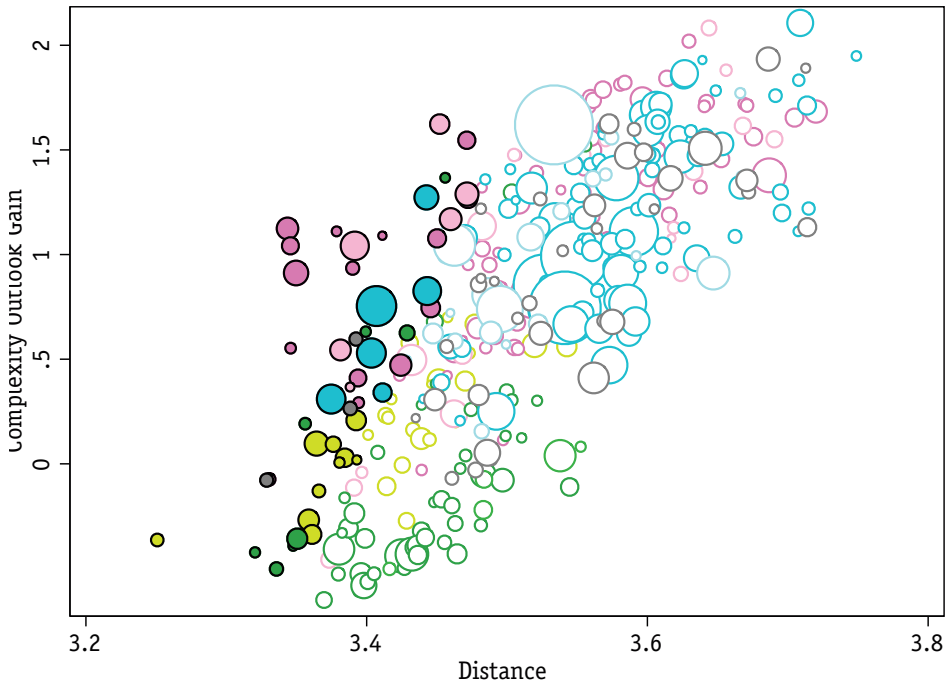
Note **Own calculation using HS4-level trade data from United Nations COMTRADE. Node size is proportional to world trade. Solid colored nodes indicate the products in which Iraq is competitive in world markets (i.e. RCA> 1). The nodes are colored according to the communities that they belong to.**

To explore how Iraq can increase the average complexity of its production, the product space analyzed above can provide clues about what new products are feasible given Iraq's constraints. Figures 5a and 5b highlight products that are attractive based on PCI and Complexity Outlook Gain (COG), respectively. The underlying idea is that countries must find the right balance between product attractiveness and the ease of conquering a product. Therefore, the most attractive corner is the northwest part of the graphs. Using these criteria, frontier products that Iraq can target with its industrial policy can be identified. A detailed description of the products on our target list is provided in table 2. These products signal to strategic clusters in Iraq for which an industrial policy should aim to provide temporary public support and public inputs to attract and facilitate private investment in new products and sectors.

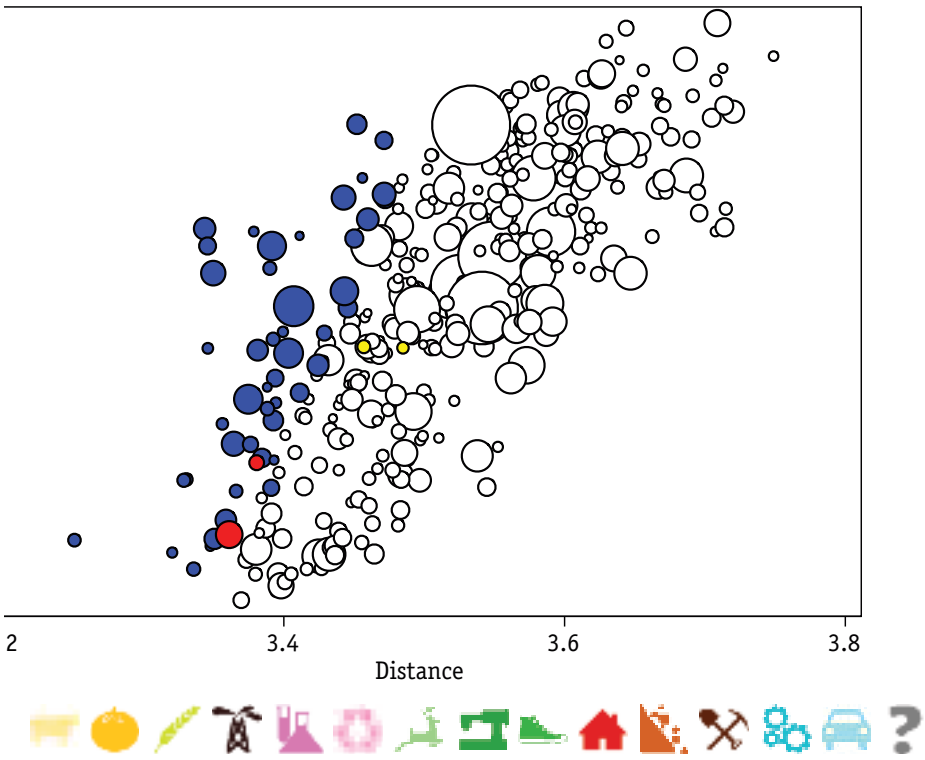
Iraq's diversification path lies mostly in the chemicals and foodstuff (agribusiness) sectors. As a group, the foodstuff cluster is relatively closer in terms of the productive knowledge that the country possesses and therefore should be easier to 'conquer'. However, these products have lower PCI or COG, making them less desirable. On the other hand, the chemical cluster is farther in distance and therefore harder to develop based on present productive knowledge in the country but it has higher values of PCI and COG. New products belonging to this community would increase the average complexity of Iraq's export basket, compensating for the cost of developing them.
Nevertheless, it is important to note that all the highlighted products are, according to our methodology, far away from the current export basket. Thus, any move toward new products will be a challenging task. All in all, Iraq should take advantage of its oil industry and pursue the development of petrochemical products within the chemical sector.

Figure 5 **Recommendations - Strategic bets for Iraq**

a **Product Complexity Index**



b **Opportunity Gain Index**



Note **Own calculation using HS4-level trade data from United Nations COMTRADE. Node size is proportional to world trade. Solid colored nodes indicate the strategic bets. The nodes are colored according to the communities that they belong to.**

Table 2 **Recommendations for Egypt**

HS4	Product name	RCA-2012	Distance	PCI	Target rank	World Trade ($)	Top Importers	Top Exporters
1806	Cocoa powder, sweetened	0.0	2.9	0.1	1	23 B	USA FRA DEU	DEU BEL ITA
2104	Soups and broths	0.0	2.9	-0.4	2	3 B	USA GBR MEX	USA DEU CAN
2106	Food preparations not elsewhere specified	0.0	2.9	0.1	3	31 B	USA GBR DEU	USA DEU NLD
1704	Confectionery sugar	0.2	2.9	-0.4	4	9 B	USA DEU GBR	DEU CHN NLD
3917	Tubes, pipes and hoses and fittings	0.3	2.9	-0.2	5	21 B	USA DEU MEX	DEU USA CHN
1901	Malt extract	0.0	2.9	-0.5	6	15 B	CHN GBR USA	NLD FRA DEU
2103	Sauces and seasonings	0.0	2.9	-0.1	7	10 B	USA GBR FRA	USA NLD DEU
9406	Prefabricated buildings	0.0	2.9	-0.1	8	7 B	DEU NOR AUS	CHN DEU NLD
2202	Waters flavored or sweetened	0.1	2.8	-1.2	8	15 B	USA GBR DEU	AUT DEU CHE
9015	Surveying, hydrographic, oceanographic, hydrological, meteorological or geo-physical instruments and appliances	0.6	2.9	-1.1	10	9 B	USA CHN GBR	USA FRA GBR
2203	Beer	0.0	2.9	-0.6	11	12 B	USA FRA GBR	MEX NLD DEU
1905	Bread, pastry, cakes, biscuits and other baked goods	0.1	2.9	-0.6	12	27 B	USA GBR FRA	DEU BEL FRA
3401	Soap	0.8	2.8	-2.0	13	6 B	USA CAN FRA	IDN DEU USA
1902	Pasta	0.1	2.8	-1.9	14	8 B	USA DEU FRA	ITA CHN USA
3208	Paints and varnishes, nonaqueous	0.5	3.0	1.0	15	13 B	RUS CHN DEU	DEU JPN USA
2009	Fruit juices	0.0	2.8	-2.2	15	15 B	USA DEU NLD	BRA CHN NLD
3402	Cleaning products	0.9	2.9	0.3	17	29 B	DEU FRA GBR	DEU USA FRA
2008	Fruit, nuts and edible plants preserved with sugar	0.2	2.8	-2.1	18	13 B	USA DEU JPN	CHN USA THA
1701	Raw sugar, cane	0.2	2.8	-2.4	19	35 B	USA CHN IDN	BRA THA IND
8474	Machinery for working earth, stone, and other mineral substances	0.2	3.0	0.7	20	19 B	RUS USA CHN	DEU CHN USA
3301	Essential oils	0.0	2.8	-2.3	21	4 B	USA FRA GBR	IND USA CHN
3923	Packing of goods	0.2	2.9	-0.6	22	42 B	USA DEU FRA	CHN DEU USA
3305	Hair products	0.3	3.0	0.4	23	12 B	USA JPN GBR	DEU FRA THA
2402	Cigars	0.0	2.9	-2.0	24	22 B	ITA FRA JPN	DEU NLD POL
3105	Mineral or chemical fertilizers, mixed	0.1	2.9	-0.9	25	24 B	IND BRA THA	RUS USA CHN
1904	Cereal foods	0.2	2.9	-0.6	25	5 B	USA CAN FRA	DEU USA GBR
3209	Paints and varnishes, aqueous	0.6	3.0	0.9	27	6 B	CAN DEU FRA	DEU USA ITA
6309	Used clothes and textiles	0.3	2.9	-0.9	28	4 B	PAK RUS UKR	USA GBR DEU
8705	Special purpose motor vehicles	0.6	2.9	-0.8	29	14 B	CAN RUS USA	DEU USA CHN
2306	Cotton seed oilcake	0.0	2.9	-1.6	29	7 B	USA NLD ESP	CAN UKR IDN
3004	Medicaments, packaged	0.0	3.1	1.5	31	331 B	USA DEU BEL	DEU USA CHE
2105	Ice cream	0.0	3.0	0.6	32	3 B	GBR FRA DEU	DEU FRA BEL
2208	Alcoholic preps for beverages	0.0	2.9	-0.8	33	28 B	USA CHN RUS	GBR FRA USA
2814	Ammonia	0.0	2.9	-2.6	35	10 B	USA IND KOR	TTO RUS CAN
2401	Tobacco, raw	0.4	2.8	-3.9	35	13 B	CHN USA DEU	BRA USA IND

HS4	Product name	RCA-2012	Distance	PCI	Target rank	World Trade ($)	Top Importers	Top Exporters
3304	Beauty or make-up preparations	0.1	3.0	0.5	35	28 B	USA GBR DEU	FRA DEU USA
6203	Men's suits, not knit	0.0	2.9	-2.5	37	41 B	USA DEU JPN	CHN BGD ITA
6305	Sacks and bags, used for packing goods	0.5	2.8	-4.1	38	4 B	USA JPN DEU	CHN IND TUR
5201	Cotton raw	0.0	2.7	-4.9	39	21 B	CHN IDN TUR	USA IND AUS
8716	Trailers and semi-trailers	0.2	3.0	1.1	40	22 B	CAN USA DEU	DEU USA CHN
3901	Polymers of ethylene, in primary forms	0.4	3.1	1.3	41	70 B	CHN DEU USA	SAU USA BEL
3506	Glues and adhesives	0.1	3.1	1.9	42	10 B	CHN DEU MEX	DEU USA CHN
6109	T-shirts	0.1	2.9	-3.7	43	35 B	USA DEU GBR	CHN BGD TUR
2309	Preparations of a kind used in animal feeding	0.0	3.0	0.4	44	23 B	DEU USA JPN	NLD USA FRA
2207	Ethyl alcohol > 80% by volume	0.0	2.9	-1.7	45	10 B	USA DEU NLD	BRA USA NLD
8426	Ships' derricks; cranes	0.0	3.0	-0.1	45	15 B	USA RUS SGP	CHN DEU USA
3924	Plastic tableware, kitchenware or other household products	0.0	2.9	-2.1	47	13 B	USA FRA DEU	CHN DEU ITA
3214	Glaziers' putty	0.0	3.1	1.8	48	7 B	DEU RUS CAN	DEU USA BEL
3307	Shaving products	0.1	3.1	1.0	49	10 B	DEU GBR USA	DEU GBR CHN
6103	Men's suits	0.1	2.9	-4.0	50	8 B	USA ARE JPN	CHN KHM TUR

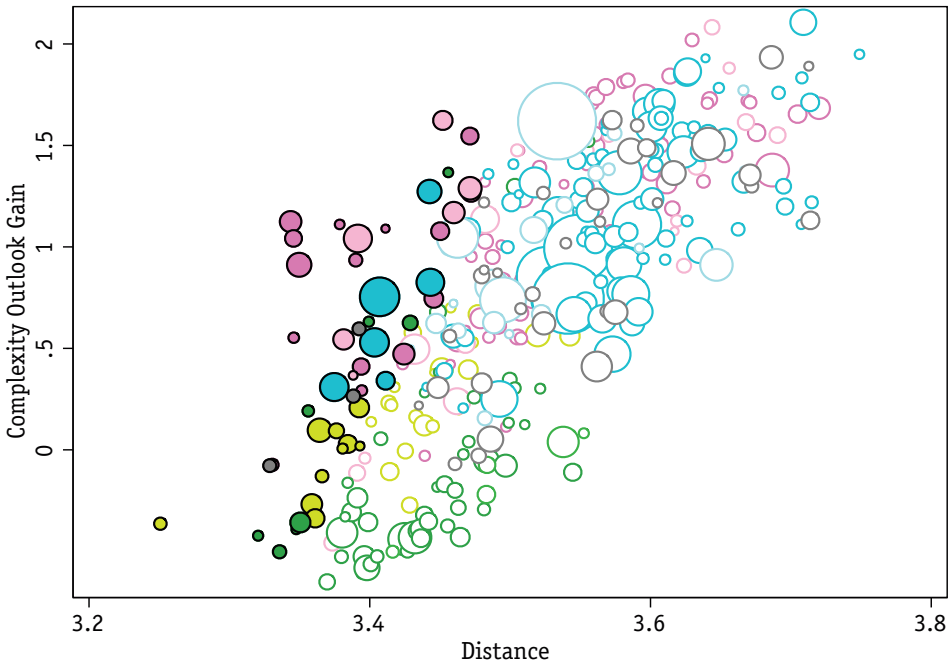
K = thousand, M = million, B = billion

The previous exercise for the year 2000 is now repeated to identify target products given a hybrid rank that combines the ease and attractiveness of the product and to compare its results with data from 2010 to analyze whether they were developed. Those products, which according to our methodology should have been conquered by Iraq but failed to be developed over time, may hint at potential market failures or constraints. Between 2000 and 2010, Iraq developed a competitive presence in several (red) products within the target list, and three other products (yellow) not identified as strategic bets by our methodology. The red products, among which are cyclic hydrocarbons (2902); polymers of vinyl chloride or of other halogenated olefins in primary forms (3904); organic composite solvents and thinners (3814); and surveying, hydrographic, oceanographic, hydrological, meteorological, or geophysical instruments and appliances (9015), exhibit high complexity and were strategic to improving the position of the country in the product space, while the yellow products belong to tropical agriculture. A complete list of products identified as opportunities is provided in table 3.

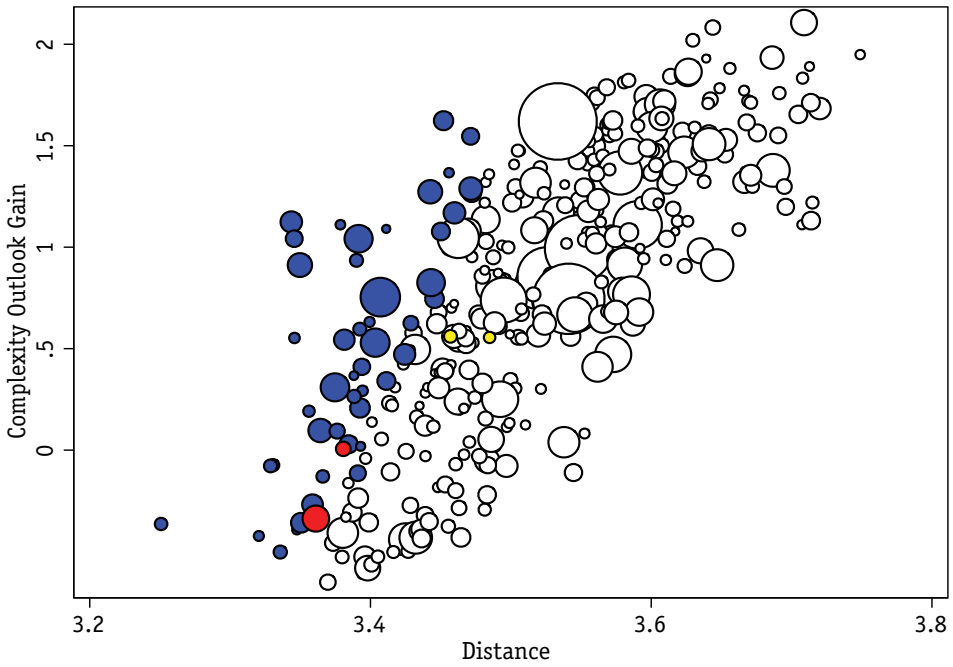
Most of the products identified by the methodology are highlighted in blue, indicating that they were not developed in Iraq by 2010. These are interpreted as missed opportunities and warrant special attention as they might also hint at the presence of market failures in the country. Nevertheless, it should be noted that many of the products, while not reaching our benchmark RCA>1, improved their standing between 2000 and 2010. On the other hand, many of the opportunities identified for year 2000 in the chemical and machinery clusters that were not seized by 2010, are, as can be seen when comparing the table below with table 2, not included in the list of products going forward.

Figure 6 **Strategic bets for Iraq in year 2000**

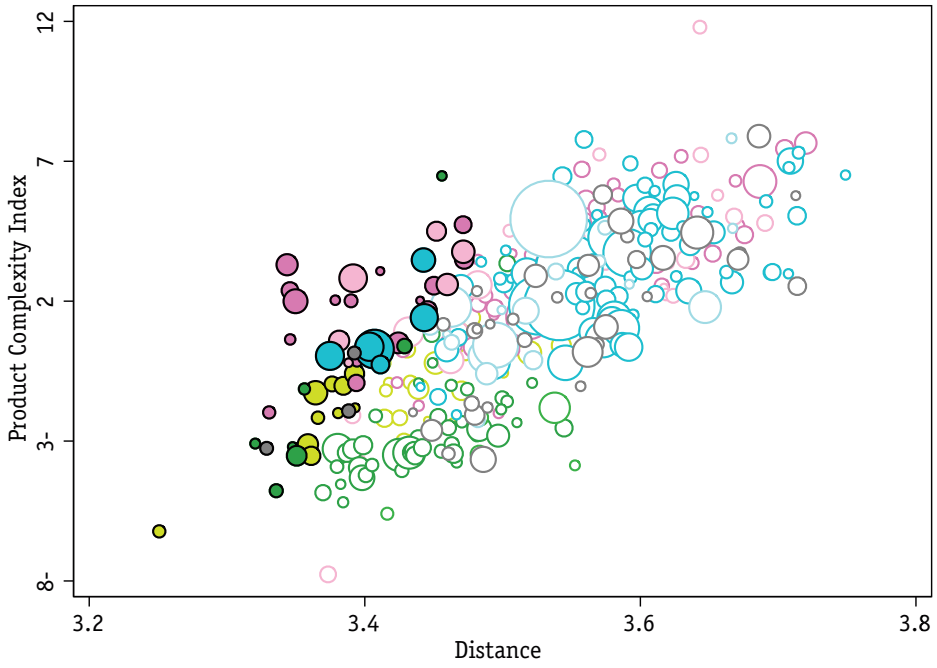
a **Opportunity Gain Index**



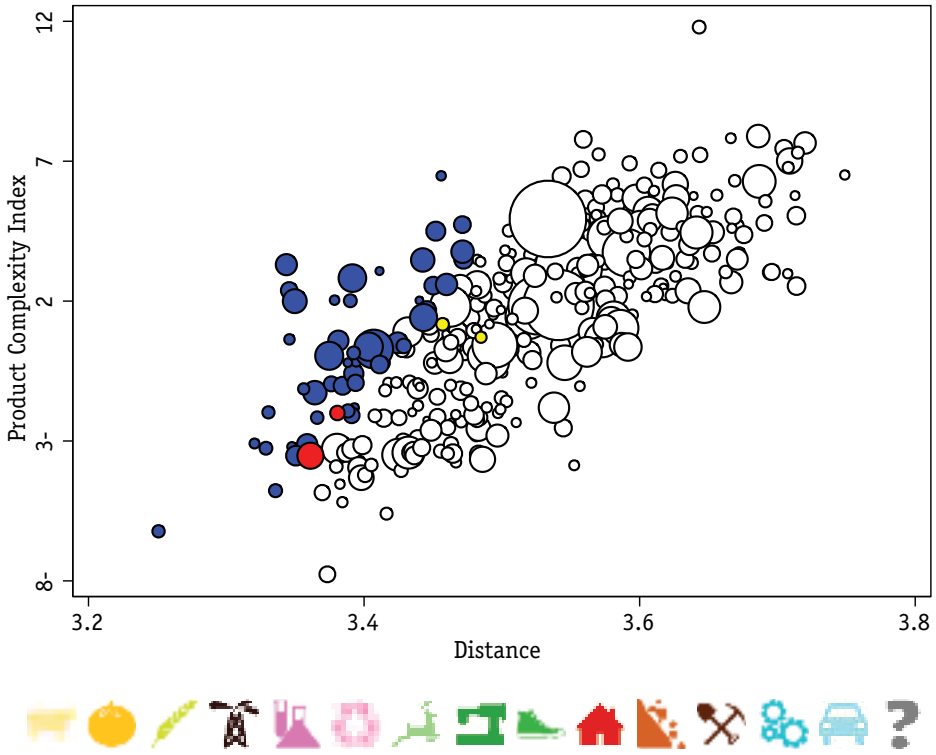
b **Opportunity Gain Index**



c **Product Complexity Index**



d **Product Complexity Index 2010**



Note **Own calculation using HS4-level trade data from United Nations COMTRADE. Node size is proportional to world trade. The nodes are colored according to the communities that they belong to in (a) and (c). In figures (b) and (d), Red nodes are conquered by Iraq and were also in our target list, Blue nodes are not conquered by Iraq and were in our target list. Finally, Yellow nodes are conquered but were not in the target list.**

Table 3 **Strategic bets for Iraq in year 2000**

HS4	Product name	RCA-2000	RCA-2010	Distance	PCI	COG	World Trade ($)	Target rank
2905	Acyclic alcohols	0.0	0.0	3.3	3.3	1.1	10 B	1
2909	Ethers	0.0	0.0	3.3	2.4	1.0	5 B	2
2902	Cyclic hydrocarbons	0.0	8.4	3.3	2.0	0.9	14 B	3
2803	Carbon, nesoi	0.0	0.0	3.4	2.0	1.1	1 B	4
3901	Polymers of ethylene, in primary forms	0.0	0.5	3.4	2.8	1.0	20 B	5
2849	Carbides	0.0	0.0	3.4	3.1	1.1	781 M	6
4002	Synthetic rubber	0.1	0.0	3.5	4.5	1.6	8 B	6
2804	Hydrogen, rare gases and other nonmetals	0.0	0.0	3.4	2.0	0.9	3 B	8
5502	Artificial filament tow	0.0	0.0	3.5	6.5	1.4	1 B	8
2815	Sodium hydroxide; potassium hydroxide; peroxides of sodium or potassium	0.0	0.0	3.3	0.6	0.6	2 B	10
8482	Ball or roller bearings	0.1	0.0	3.4	3.5	1.3	13 B	11
3904	Polymers of vinyl chloride or of other halogenated olefins, in primary forms	0.0	1.1	3.4	0.6	0.5	9 B	12
8521	Video recording apparatus	0.0	0.0	3.4	0.0	0.3	21 B	13
2903	Halogenated derivatives of hydrocarbons	0.0	0.2	3.5	4.7	1.5	5 B	14
5702	Carpets, woven, not tufted or flocked, handwoven rugs	0.0	0.7	3.4	-1.1	0.2	2 B	15
3401	Soap	0.0	0.4	3.3	-2.0	-0.1	2 B	16
9015	Surveying, hydrographic, oceanographic, hydrological, meteorological or geophysical instruments and appliances	0.0	2.1	3.4	0.1	0.6	3 B	16
5902	Tire cord fabric of high tenacity yarn of nylon	0.0	0.1	3.4	0.5	0.6	1 B	18
2402	Cigars	0.0	0.1	3.4	-1.3	0.1	13 B	19
4012	Retreaded or used pneumatic tires of rubber	0.0	0.0	3.4	-0.2	0.4	940 M	20
1704	Confectionery sugar	0.0	0.3	3.4	-1.0	0.1	4 B	21
9706	Antiques older than one hundred years	0.0	14.9	3.3	-3.3	-0.1	3 B	22
8411	Turbojets, turbo propellers and other gas turbines	0.0	0.2	3.4	0.3	0.8	50 B	23
6305	Sacks and bags, used for packing goods	0.0	0.4	3.3	-3.1	-0.4	1 B	24
8527	Reception apparatus for radio broadcasting	0.0	0.1	3.4	0.4	0.5	22 B	25
2917	Polycarboxylic acids	0.0	0.0	3.5	2.6	1.1	6 B	25
1902	Pasta	0.0	0.0	3.4	-2.2	-0.1	2 B	27
3303	Perfumes and toilet waters	0.0	0.3	3.4	-0.9	0.4	5 B	28
2009	Fruit juices	0.2	0.1	3.4	-1.0	0.0	6 B	29
3306	Dental hygiene products	0.0	0.1	3.4	-0.2	0.3	2 B	30
9101	Wrist watches and pocket watches in cases of precious metal	0.0	0.0	3.4	-1.9	0.3	3 B	31
2002	Tomatoes, prepared or preserved	0.0	1.3	3.4	-2.0	0.0	1 B	32
1905	Bread, pastry, cakes, biscuits and other baked goods	0.0	0.1	3.4	-0.6	0.2	8 B	32

HS4	Product name	RCA-2000	RCA-2010	Distance	PCI	COG	World Trade ($)	Target rank
3814	Organic composite solvents and thinners	0.0	58.8	3.4	2.0	0.8	707 M	34
1801	Cocoa beans, whole	0.0	0.0	3.3	-6.2	-0.4	2 B	35
1701	Raw sugar, cane	0.2	0.0	3.4	-3.1	-0.3	9 B	36
3902	Polymers of propylene or of other olefins, in primary forms	0.0	0.1	3.5	2.6	1.2	10 B	37
6301	Blankets and traveling rugs	0.0	0.0	3.3	-3.2	-0.4	1 B	38
3903	Polymers of styrene, in primary forms	0.0	0.1	3.5	3.8	1.3	12 B	39
5208	Woven fabrics of cotton of > 85% weighing < 200 g/m^2	0.0	0.0	3.4	-3.5	-0.4	8 B	40
3702	Photographic film in rolls	0.0	0.0	3.5	3.5	1.3	7 B	41
3402	Cleaning products	0.0	0.2	3.4	0.5	0.5	10 B	42
5513	Woven fabrics of < 85% synthetic staple fibers	0.0	0.0	3.3	-4.8	-0.5	3 B	42
8431	Parts for use with hoists and excavation machinery	0.1	0.2	3.4	1.4	0.8	19 B	44
2401	Tobacco, raw	0.0	4.0	3.4	-3.5	-0.3	7 B	45
5703	Carpets, tufted	0.0	0.2	3.4	0.4	0.6	4 B	45
8519	Sound recording apparatus	0.0	0.0	3.4	-0.3	0.3	6 B	48
2818	Artificial corundum	0.0	0.0	3.4	1.7	0.7	7 B	48
2207	Ethyl alcohol > 80% by volume	0.0	0.0	3.4	-1.8	0.0	1 B	48
3924	Plastic tableware, kitchenware or other household products	0.1	0.0	3.4	-2.1	-0.1	5 B	50

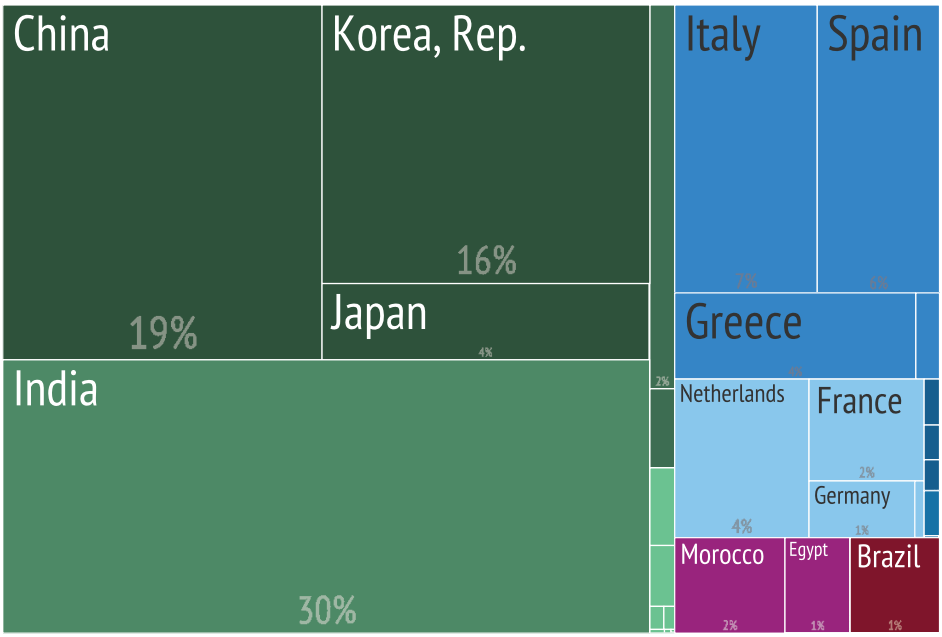
K = thousand, M = million, B = billion

Iraq's export destinations

Lastly, possible markets for the country's exports are analyzed. As can be observed in figure 7a, Iraq exports mainly to Asian countries, which have increased their share over time. The two major destinations of Iraq's exports are India and China (accounting for 30% and 19% respectively), followed by the Republic of Korea with 16%. Figure 7b shows that the share of exports destined to Europe has been relatively stable over time, while the participation of North America has been more volatile and has decreased in recent years.

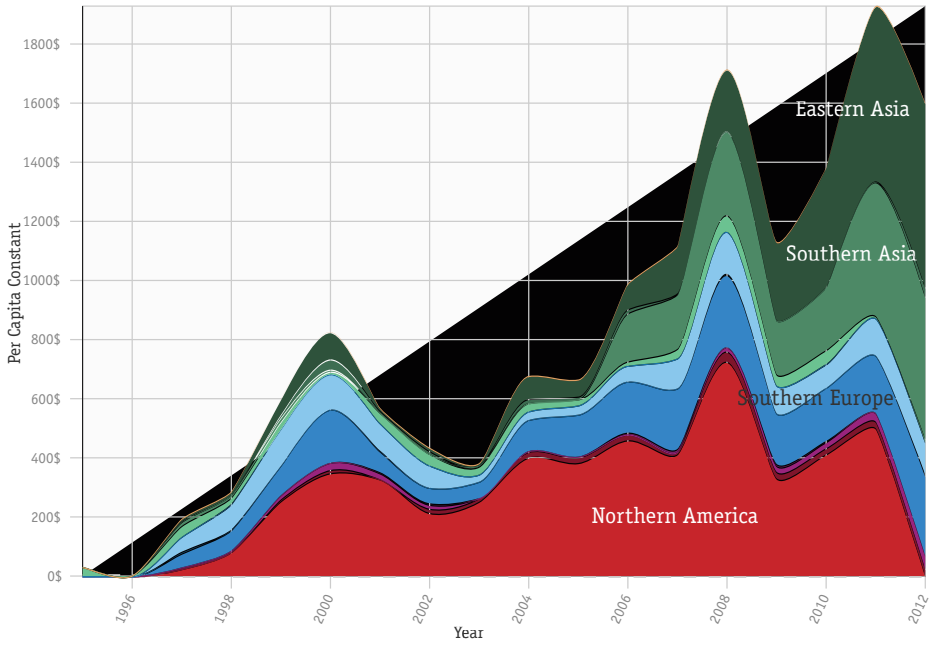
Figure 7 **Iraq trade partners (2012)**

a **Export destinations**



Iraqi exports totaling approximately $57.2 billion

b **Evolution of export destinations**



Note **Own calculation using HS4-level trade data from United Nations COMTRADE. Products are colored according to the communities that they belong according to the following legend:**



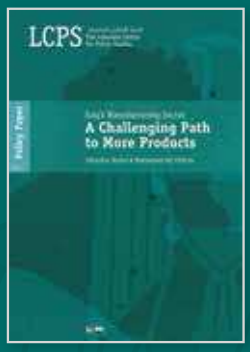
When taking into account the current trade of countries in eligible products versus the potential, it is possible to identify top export destinations for Iraq. Table 4 presents potential trade with those export destination countries as well as the potential of other countries included in this report. From the table it follows that Iraq's trade with other countries in the region is healthy, while its greatest potential lies in Germany, China, and the Netherlands.

Table 4 **Trade potential**

Importer	Trade Health	Number of Eligible Products	Potential in Eligible Products ($)	Current Trade in Eligible Products ($)	Total Trade ($)
ARE	41.7	9	1 K	12 M	14 M
CHN	0.1	1	84 K	6 K	186 K
DEU	0.1	2	292 K	31 K	272 K
DZA	146.8	1	0 K	192 K	192 K
HUN	0.0	1	77 K	3 K	4 K
JOR	217.1	2	2 K	1 M	1 M
LBN	254.1	1	0 K	515 K	534 K
NLD	0.3	2	102 K	62 K	749 K
SYR	248.7	3	0 K	4 M	4 M
TUR	31.0	7	0 K	5 M	7 M
USA	0.2	1	72 K	17 K	262 K

K = thousand, M = million, B = billion

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