

# **Facing the Dragon: Prospects for U.S. Manufacturers in the Coming Decade<sup>♦</sup>**

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<sup>♦</sup> This paper is based on Bernard, Jensen, and Schott (2004) and Bernard, Jensen, and Schott (2003).

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## **Overview: Will everything be “Made in China” by 2011?**

The large and growing trade deficit between the United States and China, the significant wage differential between Chinese and American manufacturing workers, and the loss of 2.7 million jobs in the U.S. manufacturing sector over the past three years have led to the fear in some quarters that the U.S. manufacturing sector is (increasingly) being relocated to China. Pundits proclaim the imminent end of U.S. manufacturing.

The purpose of this paper is to go beyond this uninformed hyperbole and assess the long-run prospects for U.S. manufacturing – as a whole and by industry – in the coming decade.<sup>1</sup> Our analysis shows that competition from low-wage countries like China leads over time to a *reallocation* within U.S. manufacturing: high-wage, high-skill industries where the U.S. has comparative advantage attract resources and grow; low-wage, low-skill industries decline.

We have three goals. The first is to demonstrate that not all U.S. manufacturing industries have attracted the same degree of low-wage country import competition over the past thirty years. The second is to forecast which industries will experience the greatest increase in competition from low-wage countries between now and 2011. Finally, we highlight the oft-ignored fact that low-wage country competition creates winners as well as losers in terms of employment growth and output.<sup>2</sup>

To summarize our key findings:

- ***Import penetration from low-wage countries is accelerating:*** The share of U.S. manufacturing imports originating in China and other very low-wage countries increased between 1981 and 2001, from 4% to 15%. Our forecast, based on current product-market entry by low-wage countries, indicates that increases in this share will accelerate, to 24%, by 2011.
- ***The industries most at risk are low-skill, low-wage and employ relatively few workers:*** Imports from low-wage countries have been, and will continue to be, concentrated in low-wage, low-skill, labor-intensive sectors like Apparel and Footwear. It is important to note that these sectors employ relatively few workers compared to industries where the U.S. retains comparative advantage.
- ***The industries least at risk are high-skill, high-wage:*** Industries consistent with U.S. comparative advantage – i.e. industries that are skill-intensive and pay above average wages – will continue to outperform. Even within industries that face high levels of low-wage competition, some firms will survive and thrive by adjusting their mix of products.
- ***Reallocation, reallocation, reallocation:*** Industries with relatively little competition from low-wage countries saw employment *increase* an average of 2.3% per decade over

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<sup>1</sup> This paper focuses on long-run (decade-long) changes in US manufacturing industries. We do not consider short-run determinants of employments changes, e.g. business cycles or temporary exchange rate movements.

<sup>2</sup> The biggest winners, of course, are consumers who benefit from lower prices and increased choice.

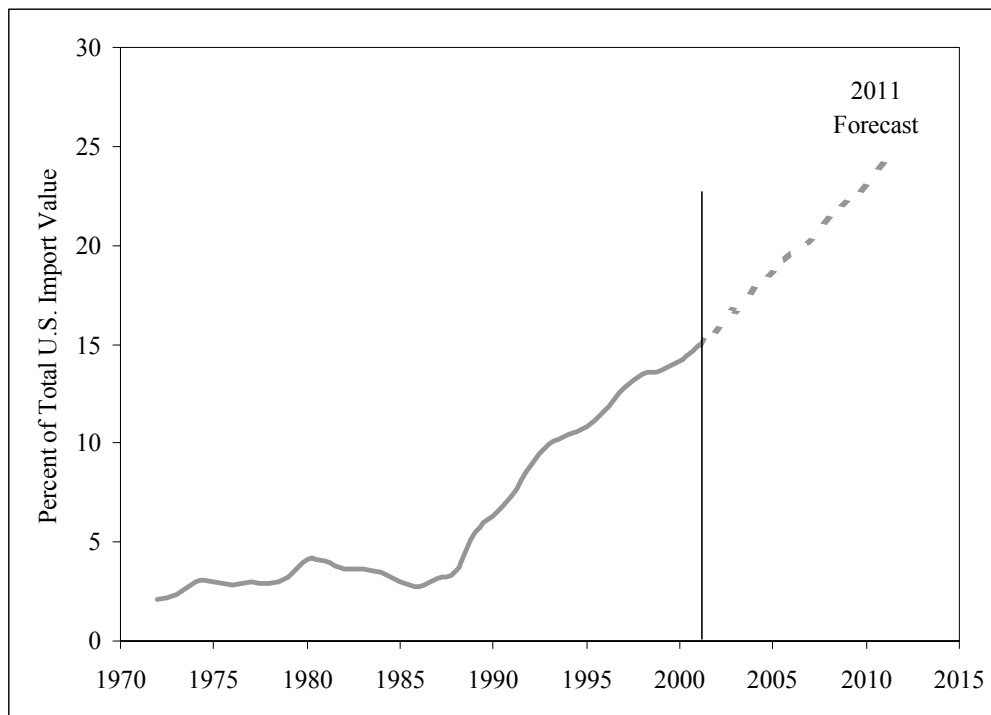
the past thirty years. By contrast, industries facing the highest levels of low-wage country competition experienced employment declines averaging 12% per decade. The net result of these trends is a reallocation of U.S. manufacturing towards U.S. comparative advantage. Competition from low-wage countries has fostered the growth of high-wage, high-skill and high-productivity industries and has hastened the decline of uncompetitive sectors.

**The Past: Which industries did low-wage countries enter over the last twenty years?**

U.S. imports of goods and services have increased rapidly over the past 20 years from \$319B in 1981 to \$1,437B in 2001 (2000\$), accounting for 6.0% of GDP in 1981 and 14.6% in 2001.

Even as total imports have increased faster than GDP, imports originating in low-wage countries have grown more rapidly than overall imports. As illustrated in Figure 1, the share of U.S. imports from the world’s poorest countries increased sharply in the mid-1980s, rising from 4% in 1981 to 15% in 2001.<sup>3</sup>

**Figure 1: U.S. Manufacturing Imports from Low-Wage Countries**



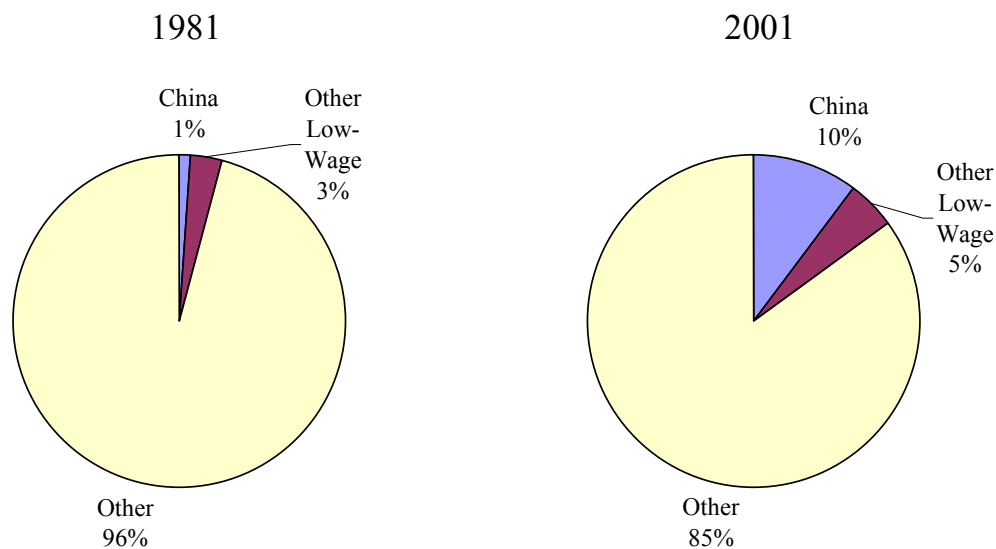
Notes: Figure displays actual and forecast share of the value of U.S. imports originating in low-wage countries from 1972 to 2011. Countries are classified as low wage if their per capita GDP is less than 5% of U.S. per capita GDP on average between 1972 and 2001.

<sup>3</sup> The countries included in the low-wage country set are listed in the appendix. Countries are included in the set if their per capita GDP is less than 5% of U.S. per capita GDP on average between 1972 and 2001.

There is little chance that this re-orientation of U.S. imports towards relatively low-wage countries will stop or reverse itself. Indeed, our forecast indicates that roughly one quarter of U.S. imports will originate in the world's poorest countries by 2011. Figure 1 extends the import-share trend to incorporate this forecast for the coming decade.

The surge in imports from low-wage countries starting in the 1980s is driven largely by China. This trend can be seen in Figure 2, which provides a breakdown of total U.S. imports by source in 1981 and 2001. As indicated in the figure, China accounted for less than 1% of U.S. manufacturing imports in 1981 but more than 10% of U.S. manufacturing imports by 2001. The overall low-wage country shares displayed in the pie charts match those displayed in Figure 1.

**Figure 2: A Breakdown of U.S. Imports in 1981 and 2001**



Notes: Figure displays share of U.S. manufacturing imports originating in low-wage countries and China in 1981 and 2001.

The aggregate increase in low-wage country import shares shown in Figure 1 has not been uniform across industries. Some sectors, such as Transportation and Chemicals, have faced relatively little low-wage country competition, while others, for example Apparel and Leather goods, have attracted much more. A breakdown of manufacturing exposure, by industry at ten-year intervals beginning in 1972, is reported in Table 1.

The key message of Table 1 is that stark differences in industry exposure to low-wage competition persist over time. In 1981, several years before the surge in aggregate exposure noted in Figure 1, three industries faced exposure greater than 10% while exposure was less than 2% in nine others. The high-to-low range of exposure was 21 percentage points. Twenty years later, in 2001, similarly sharp differences remained: seven sectors have low-wage import shares greater than 20%, while six others have exposure less than 10%. Moreover, the high-to-low range of exposure increased to 60 percentage points.

**Table 1: U.S. Exposure to Low-Wage Country Competition by Industry, 1972 to 2001**

<b>Percent of Imports from Low-Wage Countries by U.S. Manufacturing Industry, 1972-2001</b>				
<u>Industry</u>	<u>1972</u>	<u>1981</u>	<u>1991</u>	<u>2001</u>
20 Food	11	11	8	8
22 Textile	25	21	19	22
23 Apparel	3	15	30	41
24 Lumber & Wood Products	4	8	12	10
25 Furniture	1	7	7	33
26 Paper	0	0	1	7
27 Printing	0	1	4	19
28 Chemicals	2	7	3	4
29 Petroleum	1	8	5	7
30 Plastic & Rubber Products	0	1	19	30
31 Leather Goods	2	5	28	61
32 Stone & Concrete Products	1	2	7	22
33 Primary Metal	1	4	3	6
34 Fabricated Metal	1	2	6	17
35 Industrial Machinery	0	1	1	12
36 Electronics	0	2	7	18
37 Transportation Equipment	0	0	0	1
38 Instruments and Controls	0	1	3	9
39 Miscellaneous (E.g. Toys, Jewelry)	3	7	25	43
All Manufacturing	2	4	7	15

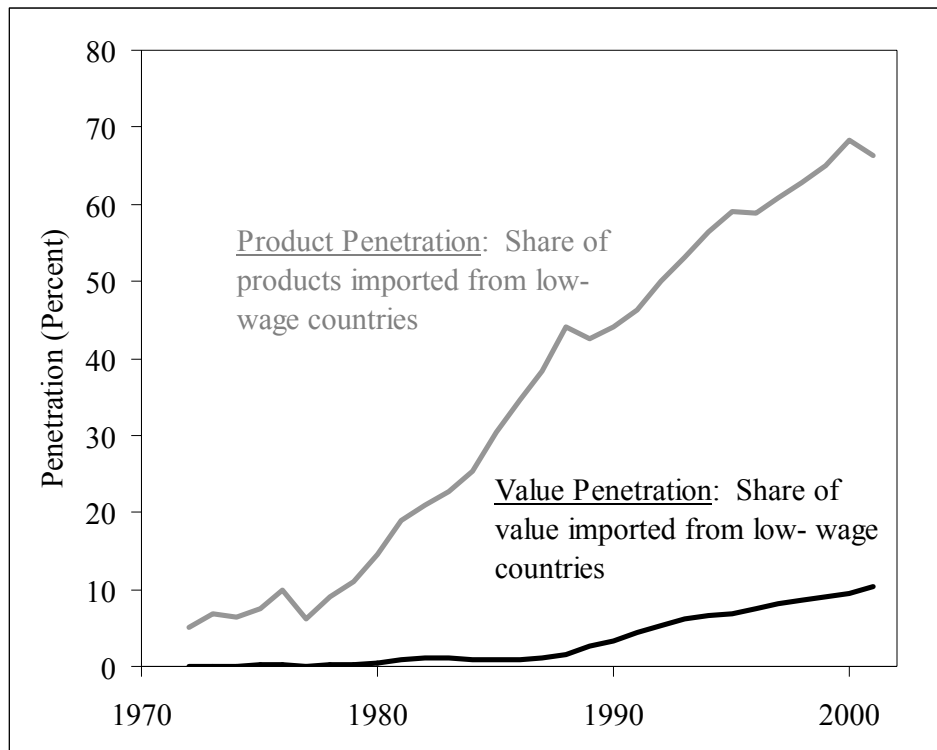
Notes: Industry identifiers are preceded by their two-digit Standard Industrial Classification (SIC) code. Each cell reports the percent of industry imports originating in countries with less than 5% of U.S. per capita GDP.

The growing exposure gap within manufacturing indicates that not every industry is heading toward the same fate. Between 1981 and 2001, for example, Leather Goods experienced the largest increase in exposure to low-wage competition, as the low-wage import share grew from 5% to 61%. Other industries with large rises include Apparel, Plastic & Rubber Products (e.g. gaskets, hoses, and pipes), and Miscellaneous Products (which includes toys). In contrast, Transportation, Chemicals, and Instruments and Controls experienced much more muted increases in exposure, such that it was still in the single digits by 2001. As we discuss in further detail below, a critical factor in determining the level of exposure to low-wage competition that an industry will face is the level of technological sophistication. High-wage, capital-using, and skill-intensive industries will continue to attract fewer imports from low-wage countries than low-wage, labor-intensive industries.

## The Future: How will competition from low-wage countries change from 2001 to 2011?

Knowing which industries are likely to experience the largest gains in low-wage country imports in the coming decade is of crucial importance for both managers and policymakers. As we discuss below, both employment and production growth are substantially lower in industries facing the highest levels of low-wage country competition. We are able to forecast changes in industry exposure to low-wage country imports over the coming decade using detailed data on product market penetration and industry characteristics. Our research reveals a lag between low-wage countries initially entering a product market and their subsequent increase in market share. By looking at the product markets that low-wage countries are entering in 2001, we can make a reliable forecast of where volumes will likely grow between 2001 and 2011.

**Figure 3: Low-Wage Countries First Establish a Beachhead and Later Gain Market Share**



Notes: Product penetration is the number of products imported from at least one low wage country divided by the total number of products imported each year. Value penetration is the total value of low-wage country imports divided by the total value of imports.

Figure 3 captures the lag between initial product-market penetration and subsequent market share increases for U.S. manufacturing as a whole. The range of products exported from low-wage countries started to increase sharply in the late 1970s, while the actual value of goods shipped from low-wage countries did not begin to rise significantly until a decade later. It is precisely this leading indicator of low-wage imports that we exploit – at the industry level – to forecast future low-wage competition within U.S. manufacturing.

The empirical model we develop suggests that current market share, current product penetration, and industry capital and skill intensity are useful predictors of future import share levels. Using this empirical model, we forecast future levels of low-wage imports.

**Table 2: Forecasted Change in U.S. Exposure to Low-Wage Country Imports, 2001 to 2011**

Manufacturing Industry	Percent of Imports from Low-Wage Countries			U.S. Employment Share	U.S. Average Hourly Wage
	<u>2001</u>	<u>2011</u>	<u>Change</u>	<u>2001</u>	<u>2001</u>
31 Leather Goods	61	87	26	0.3	\$10
23 Apparel	41	67	25	3.2	\$9
25 Furniture	33	57	24	2.9	\$12
39 Misc (E.g Toys, Jewelry)	43	65	22	2.1	\$12
32 Stone & Concrete Products	22	36	14	3.2	\$15
34 Fabricated Metal	17	30	13	8.4	\$14
27 Printing	19	31	13	8.4	\$15
30 Plastic & Rubber Products	30	42	12	5.4	\$13
22 Textile	22	32	10	2.7	\$11
36 Electronics	18	28	10	9.2	\$14
24 Lumber & Wood Products	10	19	8	4.4	\$12
26 Paper	7	14	7	3.6	\$16
35 Industrial Machinery	12	19	6	11.4	\$16
38 Instruments and Controls	9	15	6	4.7	\$15
37 Transportation Equipment	1	4	3	9.9	\$19
20 Food	8	11	3	9.6	\$13
28 Chemicals	4	7	2	5.8	\$18
33 Primary Metal	6	7	2	3.7	\$16
29 Petroleum	7	5	-2	0.7	\$21
All Manufacturing	15	24	9	100.0	\$14

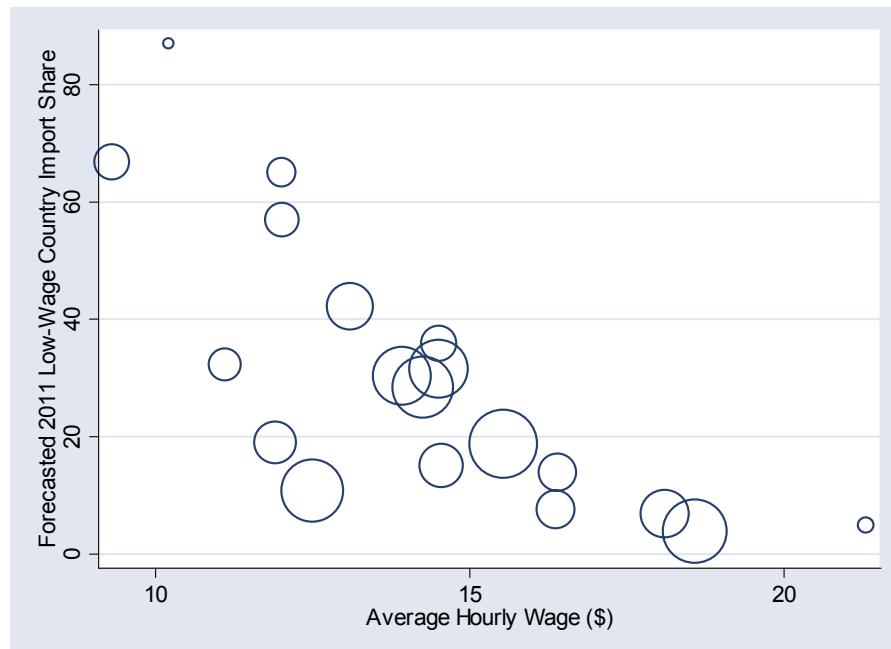
Notes: Industry identifiers are preceded by their two-digit Standard Industrial Classification (SIC) code. Rows are sorted by forecast change in low-wage country import share between 2001 and 2011 (column 4). The employment share is the fraction of U.S. manufacturing employment in the sector in 2001. The hourly wage is the average nominal hourly wage in the sector in 2001. Employment and wage data are from the U.S. Bureau of Labor statistics available at [www.bls.gov](http://www.bls.gov).

Our forecast predicts a 9 percentage point rise in the share of imports from low-wage countries between 2001 and 2011. This forecasted change is higher than that achieved by

low-wage countries in any ten-year interval over the last 30 years (compare to the bottom row of Table 1). While this aggregate gain is large, it will be distributed unevenly across industries. Indeed, the industries most at risk from future low-wage country import competition employ relatively few workers and are both low-wage and labor-intensive. Table 2 reports our forecast, as well as other characteristics, by industry. In the table, industries are sorted according to their predicted change in low-wage country exposure between 2001 and 2011.

Four sectors – Leather Goods, Apparel, Furniture and Miscellaneous – are forecast to experience increases in low-wage country import shares of more than 20 percentage points by 2011. These industries pay below-average wages and have a small share of U.S. manufacturing employment. Indeed, the five industries that are forecast to experience the largest increases in low-wage competition account for 11.7% of U.S. manufacturing employment.

**Figure 4**



Notes: Size of marker proportional to industry employment. Average hourly wage data by two-digit SIC industry is from the U.S. Bureau of Labor Statistics ([www.bls.gov](http://www.bls.gov)). Forecast low-wage country import shares by two-digit SIC industry are from Table 2.

In Figure 4, we plot the forecasted low-wage import shares in 2011 against the average industry wage in 2001. The relationship is clearly negative: industries with high wages today are forecast to have relatively small increases in imports from low-wage countries. Conversely, the highest expected increases in low-wage country import share are found in industries with the lowest average wages. The sizes of the circular industry markers in Figure 4 are proportional to their manufacturing employment share in 2001. These markers



reinforce the message that manufacturing industries with relatively large employment bases are expected to see the smallest increases in low-wage country imports.

Nine industries are forecast to experience only single-digit increases in low-wage country import competition. These industries, which represent more than half of U.S. manufacturing employment, produce capital- and skill-intensive goods that are consistent with U.S. comparative advantage. These industries pay relatively high wages and, as we discuss further below, account for the bulk of U.S. exports.

Real output growth exhibits a similar pattern. Industries with the lowest exposure increased their real output by 15% in each ten year period (roughly 1.5% per year). Output from industries experiencing the least competition from low-wage countries, however, grew more than twice as fast: 38.7% in each ten-year interval or roughly 3.9% per year.

### **The Consequences: What are the effects of low-wage country competition?**

Over the past 30 years, industries that have faced the highest levels of low-wage import competition have experienced an average net employment loss of over 12% per decade (see Table 3). In contrast, industries that faced the lowest levels of low-wage country imports actually saw their employment rise by 2.3% in each ten year interval even as employment in all of manufacturing was declining.

**Table 3: Consequences of Low-Wage Country Competition**

Initial Exposure to Low-Wage Country Imports	Average Decade-Long Change in Employment 1972-2001	Average Decade-Long Change in Real Output 1972-2001
Low	2.3%	38.7%
Middle	-4.4%	32.4%
High	-12.8%	15.0%

Notes: Industry exposure to low-wage country imports is classified as low, middle or high according to the level of exposure to low-wage imports at the beginning of each decade. Industry classification as well as average employment, real output and real export growth are across two-digit SIC industries. Employment data are from the U.S. Bureau of Labor Statistics ([www.bls.gov](http://www.bls.gov)) and output data are from the NBER Productivity Database ([www.nber.org](http://www.nber.org)). Decades are 1972 to 1982, 1982 to 1992 and 1992 to 2001. Output is deflated by shipment price indexes from the NBER dataset. Data on low-wage country import exposure are unavailable after 2001 and data on real output are unavailable after 1996. As a result, averages for the final decade for each series are scaled up appropriately.

These divergent trends are driven largely by comparative advantage. In 1981, Apparel, a relatively low-skill, low-wage industry, employed 1.2 million workers and low-wage countries accounted for 15% of total imports. By 2001, Apparel had shrunk to 566,000 employees while low-wage imports had surged to 41% of the total.

The Printing industry, relatively high-wage and high-skill, also employed 1.2 million workers in 1981. Printing, however, faced relatively little low-wage import competition in 1981, and its total employment actually grew to 1.5 million between 1981 and 2001.

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Similar outcomes are also evident across firms within industries. Plants in industries with high levels of low-wage import competition are more likely to close, have lower employment growth, and have lower output growth. Recent research in Bernard et al. (2003) indicates that a ten percentage point increase in the share of imports coming from low-wage countries increases the probability of a plant closing by 3.3 percentage points (or 13 percent). Further, plants that face higher import shares from low-wage countries experience lower employment growth and lower output growth. Each 10-percentage-point increase in import shares from low-wage countries is associated with a 1.3 percent lower annual employment growth rate for an individual plant and also lower annual output growth.

While plants facing increased low-wage country import shares are more likely to fail and have lower employment growth, certain plant characteristics appear to insulate plants from the effects of low-wage competition. Results in Bernard et al. (2003) show that, within an industry, capital usage by plants reduces the probability of closure and is especially beneficial when low-wage competition is high. As competition from low-wage imports increases, the benefits of higher capital usage increase for plant survival, job creation and output growth.

Even in exposed industries, firms can position themselves to avoid the harmful consequences of low-wage country competition. Some upgrade the products they produce within their industry while others switch to new lines of business. Bernard et al. (2003) find that plants facing higher levels of low-wage imports are more likely to switch industries than plants in industries facing lower levels of low-wage imports. In addition, the plants that switch are more likely to move to more capital-intensive and more skill-intensive industries and the higher the low-wage import share, the bigger the jump. The plant switching results confirm that plants that have higher capital intensity are less exposed to low-wage imports – capital-intensive plants within an industry are less likely to switch products than other plants in the industry.

Increasing low-wage country imports over the next decade will provide a powerful force for the reallocation of resources in the manufacturing sector. This reallocation will be driven by differential outcomes across industries, within-industry growth of skill and capital-intensive firms, and the changes in firm product mix towards high-end goods. These forces will continue to change the composition of U.S. manufacturing towards high-wage, high-skill activities.

## The Forgotten: What is the role for exports?

The lesson from the previous sections is that most industries and most manufacturing workers are not threatened by the looming increase in low-wage country imports. However, while the focus of this brief is on exploring the future path of imports from low-wage countries, the export side of international trade cannot be completely overlooked. International trade – including imports from low-wage countries – drives change in the U.S. economy. As we have seen above, industries restructure in the face of imports from low-wage countries, reallocating resources to activities that are more productive and more consistent with U.S. comparative advantage. But international trade offers another benefit to the U.S. economy – the opportunity to export. And the benefits of exporting are considerable.

Table 4 illustrates that U.S. export growth has been highest in its comparative advantage industries. Export growth has been 6.8 percentage points higher each decade, on average, for industries facing low versus high shares of low-wage country imports.

**Table 4: U.S. Export Growth**

Initial Exposure to Low- Wage Country Imports	Average Decade-Long Change in U.S. Real Exports
	1972-2001
Low	59.2%
Middle	56.7%
High	52.4%

Notes: Industry exposure to low-wage country imports is determined as noted in Table 3. Export data are from Feenstra et. al (2002) and are deflated by industry shipment price indexes available from the NBER ([www.nber.org](http://www.nber.org)). Decades are 1972 to 1982, 1982 to 1992 and 1992 to 2001. Data on real exports are unavailable after 1997. As a result, the average for the final decade is scaled up appropriately.

Exporters are different, and better, than non-exporting plants. As Bernard and Jensen (1995, 1999) report, exporters pay 12% higher wages, are 20% more capital intensive, and are 19% more productive. Across all industries, exporters have higher annual employment and output growth, between 2% and 5% faster on average, and these firms are less likely to fail. The combination of superior productivity, higher wages, faster growth and higher survival chances mean that increased opportunities to export have a range of desirable outcomes. Both sides of the trade equation, imports and exports, are working to realign U.S. manufacturing towards U.S. comparative advantage in high-wage industries.

## **A Challenge to Public Policy**

Competition from low-wage countries induces a long-run reallocation of U.S. economic activity away from low-wage, low-skill industries and towards high-wage, high-skill industries. Over time, our country benefits from more efficient production, a wider variety of products, lower prices, and an improved standard of living. However, our forecast highlights that these net gains will not be shared equally by all workers. Though some displaced workers will be absorbed relatively quickly by expanding industries, others may face prolonged bouts of unemployment or rehiring at lower wages.<sup>4</sup>

Surveys demonstrate that fear of job loss and wage deterioration are important factors in public sentiment against trade liberalization.<sup>5</sup> Thus, our forecast presents an important challenge to policy makers. The prospect of accelerating change presents a natural temptation to try to protect industries that face competitive pressures. To give in to this temptation would inhibit one of the great strengths of the US economy – its flexibility and adaptability. Instead of policies to inhibit change, we need policies that facilitate adjustment. Going forward, we need to focus on workers rather than jobs (and industries), on alleviating employee anxiety by facilitating and supporting employee transitions rather than supporting employer inefficiency.<sup>6</sup> These policies merit much more serious scrutiny if we are to maintain our commitment to free trade and all the benefits that this commitment creates.

### **In summary:**

- U.S. manufacturers are likely to see increased levels of low-wage import competition over the next decade.
- Sectors within manufacturing will have dramatically different experiences with low-wage imports over the next decade.
- Low-wage, labor-intensive industries will face the largest increases in low-wage import competition and are likely to experience the largest decreases in employment and the largest number of plant closings.
- Industries that are capital-intensive and skill-intensive will face smaller increases in low-wage import competition and may add jobs even as they greatly increase output.

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<sup>4</sup> Kletzer (2001) finds that about a third of reemployed workers earn as much or more from their new job after displacement and about a quarter realizes losses greater than 30%.

<sup>5</sup> Scheve, Kenneth F. and Matthew J. Slaughter. March 2001. "Globalization and the Perceptions of American Workers." Institute for International Economics.

<sup>6</sup> Several such policies, for example wage insurance and health insurance subsidies, have received some attention in recent years. See Kletzer, Lori and Robert E. Litan. February 2001. "A Prescription to Relieve Worker Anxiety." Institute for International Economics.

- Inside industries facing competition from low-wage countries, firms that are capital-intensive and skill-intensive will have better prospects than their industry rivals.
- Both within and across industries, U.S. manufacturers will move productive capacity to products more in line with U.S. comparative advantage.

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**Table 5: Low Wage Countries**

<b>Country</b>	<b>Average Percent of U.S. Per Capita GDP, 1972-2001</b>		<b>Average Percent of U.S. Per Capita GDP, 1972- 2001</b>
Albania	0.03	Laos	0.01
Angola	0.02	Madagascar	0.01
Bangladesh	0.01	Malawi	0.01
Benin	0.02	Mali	0.01
Bolivia	0.04	Mauritania	0.02
Burkina	0.01	Mongolia	0.02
Burundi	0.01	Morocco	0.05
Cambodia	0.01	Mozambique	0.01
Cameroon	0.03	Nepal	0.01
Central African Republic	0.02	Nicaragua	0.03
Chad	0.01	Niger	0.01
China (mainland)	0.01	Nigeria	0.01
Comoros	0.02	Pakistan	0.02
Congo	0.01	Papua New Guinea	0.04
Congo, Rep.	0.04	Philippines	0.05
Djibouti	0.04	Rwanda	0.01
Egypt	0.04	Senegal	0.02
Equatorial Guinea	0.02	Sierra Leone	0.01
Ethiopia	0.00	Sri Lanka	0.02
Gambia, the	0.02	Sudan	0.01
Ghana	0.02	Suriname	0.04
Guinea	0.02	Syrian Arab Republic	0.03
Guinea-Bissau	0.01	Tanzania	0.01
Guyana	0.03	Togo	0.02
Haiti	0.02	Uganda	0.01
Honduras	0.03	Vietnam	0.01
India	0.01	Yemen Arab Republic	0.01
Indonesia	0.03	Zambia	0.02
Ivory Coast	0.04	Zimbabwe	0.03