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Syria's Manufacturing Sector

Pre-War Industrial Potential

Sebastian Bustos & Muhammed Ali Yildirim



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Pre-War Industrial Potential

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1 Please see the introduction for a detailed methodology. http://www.lcps-lebanon.org/publication.php?id=294&category=90 0&year=2017

An overview of Syria

Since Syria has been in a state of civil war since 2011, data from 2009 is used to evaluate its productive base. Syria's position in the product space suggests that the country's future path for development should focus on new opportunities in the chemical and food clusters. Table 1 lists target sectors that the methodology identifies as strategic for Syria's future development.

The community with the greatest number of target products is the chemicals & allied industries cluster, with 11 products (HS2:28-38). The second cluster with a high number of target products is the foodstuff community (with a total of 10 products, HS2:16-24). The methodology also identifies nine in both the machinery/electrical (HS2:84-85) and the textile clusters (HS2:50-63), and four target products in the plastics/rubber community (HS2:39-40). While products in the foodstuff and textile community are closer in distance in terms of productive knowledge and capabilities of the country, the products in the chemicals & allied industry, plastics/rubber, and machinery/ electrical communities have a higher Product Complexity Index (PCI). Therefore, developing them would have a larger impact on Syria's average complexity. Syria has a considerable presence in most of the target sectors. Only four categories (at the HS2 level) have no products present.

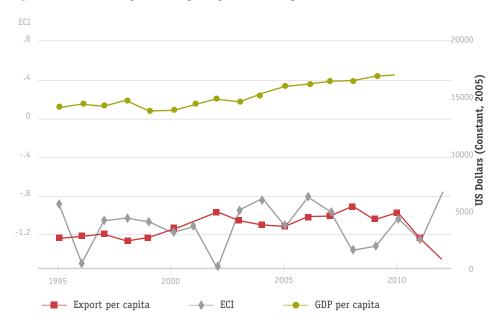
Table 1 Summary of target sectors

HS2	Product name	Product Targets	Products Present		World Exports (\$)
84	Machinery and Mechanical Appliances,	7	6	85	1467 B
	Computers, Boilers, Nuclear Reactors				
62	Articles of Apparel and Clothing	4	10	17	39 B
	Accessories-Not Knitted/Crocheted				
94	Furniture, Bedding, Lighting,	4	0	6	146 B
	Prefabricated Buildings				
33	Oils and Resinoids, Perfumery,	4	1	7	66 B
	Cosmetics				
38	Misc. Chemical Prods.	3	0	23	123 B
40	Rubbers and Articles Thereof	3	2	17	126 B
61	Articles of Apparel and Clothing	2	14	17	13 B
	Accessories Knitted/Crocheted				
21	Misc. Edible Preparations	2	3	6	35 B
19	Preps. of Cereals, Flour, Starch or Milk	2	3	5	18 B
85	Electrial Machinery	2	1	48	1412 B
87	Vehicles other than Rail/Tramway	2	0	16	849 B
	Rolling Stock				
22	Beverages, Spirits and Vinegar	2	3	9	64 B
16	Ed. Prep of Meat, Fish, Crustaceans, Etc.	2	1	5	23 B

HS2	Product name	Product Targets		Products in Community	World Exports (\$)
32	Putty and Inks, Dyes, Pigments, Paints	2	4	15	51 B
	and Putty				
31	Fertilizers	2	0	5	45 B
52	Cotton, Yarns, Woven Fabrics Thereof	1	9	12	11 B
96	Misc. Manufactured Articles	1	4	18	16 B
39	Plastic and Articles Thereof	1	11	26	166 B
56	Wadding, Felt and Nonwovens, Special	1	5	9	13 B
	Yarns, Twine, Cordage, Ropes and				
	Cables and Articles				
24	Tobacco and Manuf. Tobacco Subs.	1	0	3	35 B
59	Impregnated, Coated, Covered, or	1	3	11	9 B
	Laminated Text. Prod				
20	Preps. of Vegs, Fruits, Nuts, Etc.	1	6	9	15 B

K = thousand, M = million, B = billion

Figure 1 Evolution of Syria '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.

With Syria in the midst of a civil war, not surprisingly, its productive structure has been adversely affected. This is reflected in figure 1 by the volatility and collapse of exports per capita. Additionally, the war might explain missing GDP per capita data. Prior to the war, GDP per capita was increasing while exports were stagnant. Syria's Economic Complexity Index (ECI), on the other hand, has also varied greatly during the last decade, including a collapse after the beginning of the

civil war, which improved slightly during 2012. The evolution of the country's ECI shows that the average complexity of Syria's products has not improved since 1995 and has been consistently low. Given the lack of trustworthy data due to war, as noted above, this analysis is based on the period ending 2009. It is important to note that suggestions in this report might not apply to contemporary Syria given the emigration and destruction occurring in the country.

Stairway to heaven Let it be Parsimonious industrial policy It ain't broke Help jump short distances to other Ample space to move products in all directions IND Complexity Outlook Index BLZ ●RUS JPN 4 Hey Jude: make it better Bridge over troubled waters Competitiveness policy Strategic bets Improve the conditions of the Little space to improve quality and sectors that already exist few nearby trees

Figure 2 Summary of Syria in the product space (2009)

1-

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

n

ECI (controlling for GDPpc & Natural Resource Exports)

1

2

The figure above shows the position of countries in terms of ECI (after controlling for the effect of income and natural resources) and countries' positions' relative to complex products on the product space. Syria's ECI is lower than what its current GDP per capita and natural resource exports suggest. Consequently, there is not much to exploit in that dimension. In order for Syria to increase its complexity, and therefore its income level, it must move into more complex products.

Despite Syria's average low complexity, the country is well-located in the product space and has, on average, shorter distances to more complex products, implied by its relatively high Complexity Outlook Index values. Therefore, in the pre-war period, Syria had the potential to climb the stairway to heaven by implementing parsimonious industrial policy to help jump shorter distances to other more complex products. Countries in this upper left quadrant should focus on providing

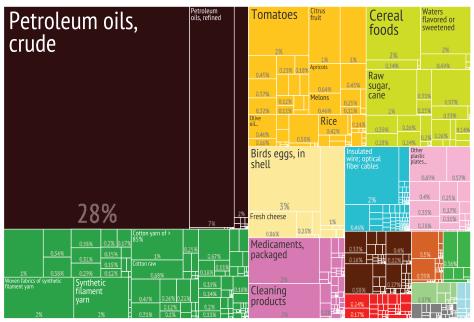
support and public inputs (such as infrastructure, regulation, etc.) to existing industries with the aim of improving their productivity and ability to move into nearby opportunities.

Syria's productive structure

In 2009, Syria's exports totaled about \$10 billion (figure 3a). Its main exports are petroleum, be it crude, refined, or gases, which accounted for 45% of net exports. Figure 3b shows that textiles and agricultural products also have an important share of Syria's total exports. Figure 3c shows that Syria's export basket diversity increased around 2005, coinciding with the free trade agreement with Turkey and the start of the recovery in Iraq. After the start of the civil war, Syria's economy collapsed.

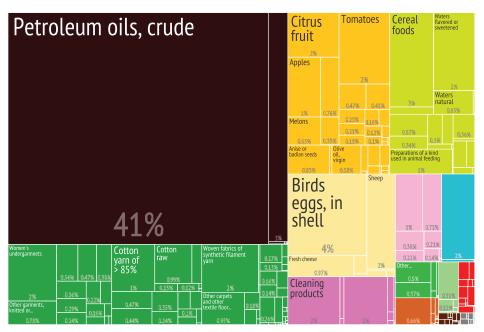
Figure 3 Syria's trade structure in 2009 and evolution of exports per capita of Syria (1995-2012)

a Exports of Syria



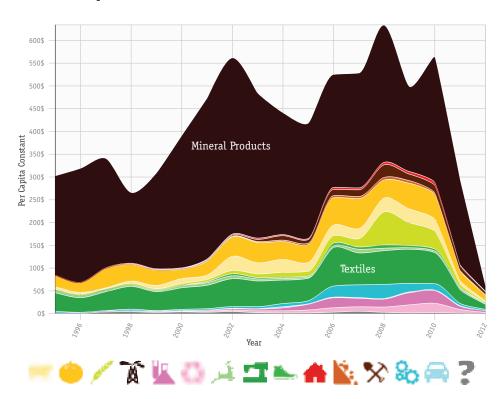
Syria's exports totaling approximately \$9.8 billion

b Net exports of Syria



Syria net exports totaling approximately \$6.7 billion

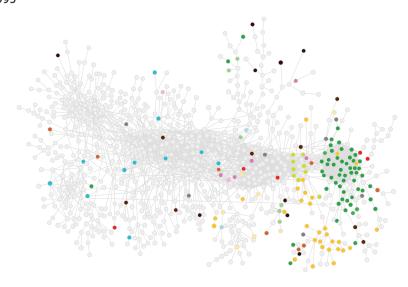
C Evolution of exports



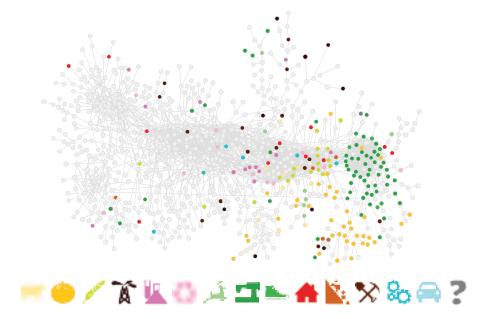
Note Own calculation using HS4-level trade data from United Nations COMTRADE. Products are colored according to the communities that they belong according to the following legend:

Figure 4 Syria on the product space

a 1995



b 2009

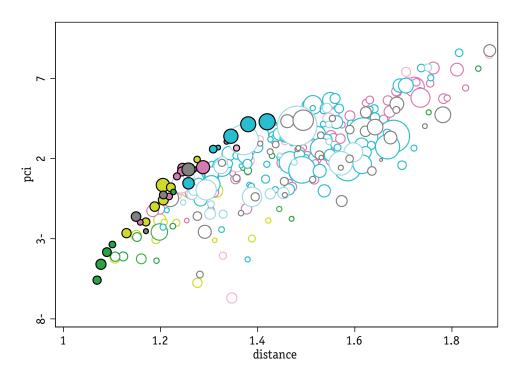


Note Own calculation using HS4-level trade data from United Nations COMTRADE. Products are colored according to the communities that they belong according to the following legend:

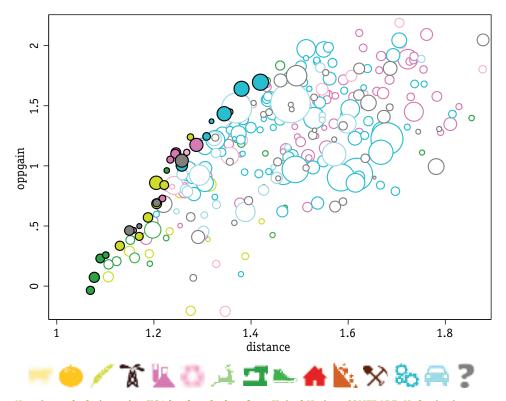
In order to get a sense of the type of productive knowledge present in Syria and what may be nearby, its product space and its change from 1995 to 2009 are analyzed (figure 4a and 4b). Syria's product space has diversified since 1995. Nevertheless, the country mostly produces low complexity materials, which are located on the right side or periphery of the product space, making knowledge accumulation more difficult. Like many developing countries, Syria has an important presence in textile and agricultural industries (green and yellow). It should be noted that the number of products (with RCA greater than one) within these clusters has diminished from 1995 to 2009, particularly textile products but also in some machinery and electronic products. On the other hand, in 2009, it is possible to see more products in the central, more interconnected region of the product space. These products can serve as a springboard for further diversification.

Figure 5 Strategic bets for Syria

a Product Complexity Index



b Complexity Outlook Gain



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.

To shed light on how to increase the average complexity of a country's production, the product space analyzed above, and in particular some emergent activities, can provide clues about what new products are feasible given Syria's constraints. In figures 5a and 5b, it is possible to see that target products include machinery, chemical, furniture, and textile products. As a group, the textile cluster is relatively close in terms of the country possessing the inputs required for its production and therefore should be easier to 'conquer'. Nevertheless, these products have a lower PCI or Complexity Outlook Gain, making them less desirable. On the other hand, machinery products are farther in distance and therefore harder to develop based on productive knowledge in the country, but have higher values of PCI and Complexity Outlook Gain. New products belonging to this community would increase the average complexity of Syria's export basket, compensating for the cost of developing them. In between these two clusters are a few strategic products in the chemical community which are closer in distance than most machinery products, but have a higher PCI and Complexity Outlook Gain than textile bets. Interestingly, as can be seen in table 2, Syria had some presence in the target sectors as of 2009, meaning the country was moving in the right direction for diversification.

Table 2 Recommendations for Syria

						747 c w] d	
HS4	Product name	RCA-2009	Distance	PCI	OppGain	World Trade (\$)	Target rank
1601	Sausages	0.0	1.3	1.9	1.2	4 B	1
3208	Paints and varnishes, nonaqueous	0.4	1.2	1.4	1.1	10 B	2
3307	Shaving products	0.5	1.2	1.2	1.1	9 B	3
2106	Food preparations not elsewhere specified	0.6	1.2	0.3	0.9	25 B	3
3209	Paints and varnishes, aqueous	0.6	1.2	0.9	1.1	4 B	5
8419	Machinery, plant or laboratory equipment involving	0.1	1.4	4.1	1.6	33 B	6
	a change of temperature such as heating, cooking,						
	roasting						
8537	Electrical Boards and panels for protecting electrical	0.1	1.3	3.4	1.4	29 B	7
	circuits						
9405	Lamps and lighting fittings	0.2	1.3	1.3	1.0	23 B	8
3816	Refractory cements, mortars	0.2	1.3	3.0	1.4	2 B	9
8434	Milking and dairy machines	0.0	1.3	2.7	1.4	2 B	10
3922	Baths, shower baths, sinks, washbasins, bidets,	0.2	1.3	1.3	1.1	3 B	11
	lavatory pans, seats and covers						
9404	Mattress supports; articles of bedding	0.5	1.1	-1.6	0.5	10 B	12
8432	Agricultural, forestry machinery for soil preparation	0.0	1.3	2.6	1.2	6 B	13
2103	Sauces and seasonings	0.7	1.2	0.2	0.8	8 B	14
2203	Beer	0.5	1.2	-1.0	0.6	10 B	15
3301	Essential oils	0.2	1.2	-2.0	0.5	3 B	16
6211	Active wear, not knit	0.4	1.1	-3.8	0.2	8 B	17
5601	Wadding of textile materials	8.0	1.2	-0.1	1.0	2 B	18
6112	Active wear	0.5	1.1	-3.4	0.3	4 B	18
9406	Prefabricated buildings	0.6	1.2	-0.3	0.7	6 B	20
2008	Fruit, nuts and edible plants preserved with sugar	0.6	1.1	-2.7	0.3	9 B	21
8474	Machinery for working earth, stone, and other	0.3	1.3	0.5	1.0	16 B	22
	mineral substances						
8421	Centrifuges	0.1	1.4	4.3	1.7	40 B	22
3304	Beauty or make-up preparations	0.7	1.3	1.5	1.2	23 B	24
6105	Men's shirts	0.9	1.1	-5.6	-0.0	7 B	25
6205	Men's shirts, not knit	0.3	1.1	-4.6	0.1	12 B	25
1901	Malt extract	0.1	1.2	-0.6	0.7	11 B	27
1902	Pasta	0.4	1.2	-2.0	0.4	6 B	28
4008	Plates, sheets, strip, rods and profile shapes, of	0.2	1.4	2.7	1.4	3 B	29
	vulcanized rubber						
9607	Slide fasteners and parts thereof	0.6	1.2	-2.5	0.5	2 B	30
3306	Dental hygiene products	0.2	1.2	-0.4	0.7	4 B	31
1604	Prepared or preserved fish	0.0	1.1	-2.8	0.3	12 B	32
8716	Trailers and semi-trailers	0.8	1.3	0.9	0.9	14 B	33
8708	Parts and accessories of the motor vehicles	0.1	1.4	3.2	1.5	214 B	34

HS4	Product name	RCA-2009	Distance	PCI	OppGain	World Trade (\$)	Target rank
2401	Tobacco, raw	0.9	1.1	-4.2	0.1	12 B	35
6201	Men's overcoats, not knit	0.6	1.1	-4.1	0.2	9 B	36
4011	New pneumatic tires, of rubber	0.1	1.2	0.4	0.8	55 B	36
3105	Mineral or chemical fertilizers, mixed	0.5	1.2	-1.1	0.5	13 B	38
5208	Woven fabrics of cotton of > 85% weighing < 200 g/m2	0.9	1.1	-4.1	0.2	10 B	38
6212	Brassieres and parts thereof, not knit	0.2	1.2	-2.9	0.4	8 B	40
3102	Mineral or chemical fertilizers, nitrogenous	0.0	1.2	-1.3	0.4	17 B	41
3823	Industrial monocarboxylic fatty acids; acid oils from	0.1	1.4	3.4	1.5	32 B	42
	refining; industrial fatty alcohols						
8451	Machinery for washing, cleaning or drying fabrics	0.1	1.3	1.1	1.2	5 B	43
3814	Organic composite solvents and thinners	0.3	1.2	-0.7	0.8	2 B	44
4012	Retreaded or used pneumatic tires of rubber	0.4	1.2	-0.4	0.8	2 B	45
8504	Electrical transformers	0.8	1.3	0.6	1.0	67 B	46
2207	Ethyl alcohol > 80% by volume	0.2	1.2	-2.4	0.4	6 B	47
9401	Seats	0.1	1.2	-0.5	0.7	46 B	48
5911	Textile fabric for card clothing, technical use	0.0	1.4	4.1	1.7	4 B	49
8437	Machines for cleaning, sorting or grading seed; machinery used in the milling industry or for the working of cereals or dried leguminous vegetables	0.9	1.2	-1.2	0.7	2 B	49

K = thousand, M = million, B = billion

The previous exercise is now repeated for the year 2000 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. In figures 6a and 6c, and the table below, it can be observed that Syria by 2009 had diversified into 20 (red) out of 50 products on the target list for the year 2000.²

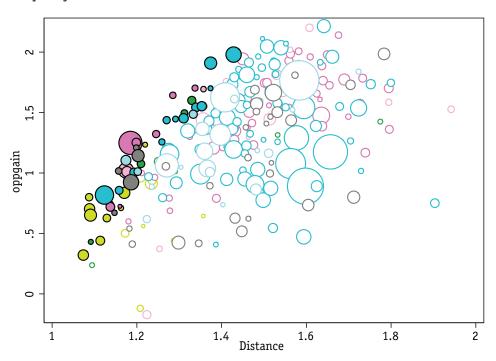
Additionally, it became competitive in several yellow products that are not far away from red or blue products, which validates our approach. Nevertheless, there are several products (in blue) that have high attractiveness and are also relatively easy to conquer that were not developed in Syria by 2010. These are interpreted as missed opportunities. These blue products warrant special attention as they might also hint to the presence of market failures in the country. As can be seen in figures 6a and 6c, while there are products from the agribusiness and chemical communities, most of them are in the machinery cluster. A detailed description of these products is provided in table 3.

Some products are hidden behind other nodes that have the same values.

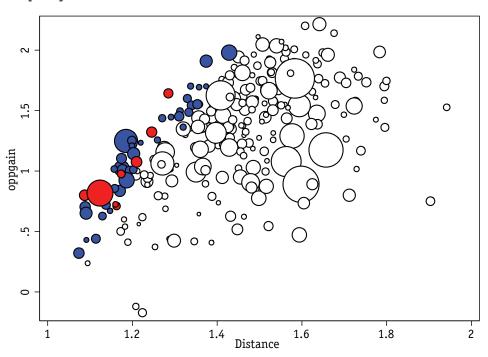
Using table 3, it is possible to see that most of the products identified increased their revealed comparative advantage value significantly, demonstrating that Syria has been increasing its competitiveness in industries on the target list. About 20% of the products identified decreased their RCA from 2000 to 2010.

Figure 6 Strategic bets for Syria in year 2000

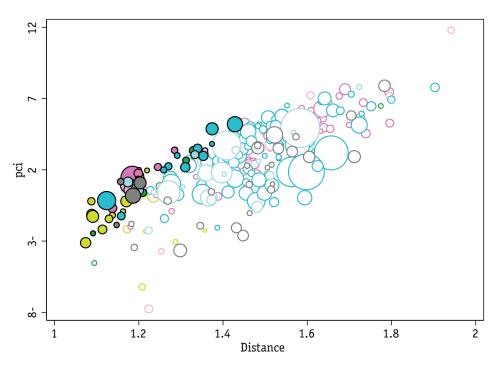
a Complexity Outlook Gain



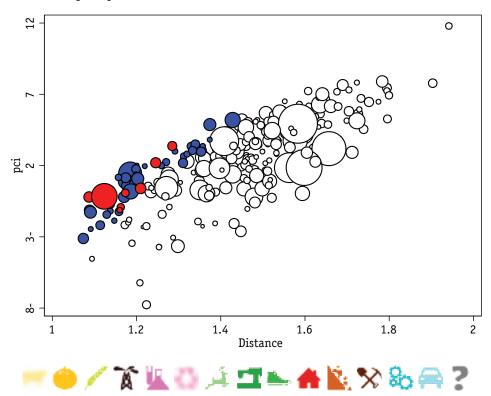
b Complexity Outlook Gain



C Product Complexity Index



d Product Complexity Index



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 Syria and were also in our target list, Blue nodes are not conquered by Syria and were in our target list. Finally, Yellow nodes are conquered but were not in the target list.

Table 3 Strategic bets for Syria in year 2000

	Table 5 Strategic bets	RCA-	RCA-				World	Target
HS4	Product name	2000	2009	Distance	PCI	OppGain	Trade (\$)	
3214	Glaziers' putty	0.1	1.5	1.3	3.4	1.6	3 B	1
9406	Prefabricated buildings	0.3	0.9	1.2	1.2	1.0	3 B	2
3004	Medicaments, packaged	0.4	1.1	1.2	1.4	1.2	74 B	3
3814	Organic composite solvents and thinners	0.3	0.2	1.2	2.0	1.2	707 M	4
8716	Trailers and semi-trailers	0.2	1.0	1.2	1.1	1.1	8 B	5
3208	Paints and varnishes, nonaqueous	0.1	0.4	1.2	1.7	1.3	6 B	6
8419	Machinery, plant or laboratory equipment	0.4	0.1	1.4	4.9	1.9	14 B	7
	involving a change of temperature such as							
	heating, cooking, roasting							
2202	Waters flavored or sweetened	0.1	31.7	1.1	-0.2	0.8	4 B	8
3809	Finishing agents for dyeing	0.0	0.0	1.3	3.5	1.7	2 B	9
9028	Gas, liquid or electricity supply or production	0.0	0.1	1.2	1.4	1.2	2 B	10
	meters							
4011	New pneumatic tires, of rubber	0.0	0.1	1.2	0.9	1.0	24 B	11
8544	Insulated wire; optical fiber cables	0.4	3.6	1.1	-0.2	0.8	40 B	12
1601	Sausages	0.0	0.1	1.2	2.0	1.2	1 B	13
2104	Soups and broths	0.4	6.3	1.1	-0.6	0.8	1 B	14
3904	Polymers of vinyl chloride or of other	0.3	0.3	1.2	0.6	1.0	9 B	15
	halogenated olefins, in primary forms							
5603	Nonwoven textiles	0.8	0.5	1.3	3.4	1.6	5 B	15
2106	Food preparations not elsewhere specified	0.6	0.8	1.1	-1.1	0.7	9 B	17
3306	Dental hygiene products	0.2	0.2	1.1	-0.2	0.8	2 B	18
3506	Glues and adhesives	0.2	1.5	1.2	2.2	1.3	3 B	19
8535	Apparatus protecting electrical circuits	0.1	0.1	1.3	2.2	1.4	3 B	20
	for > 1k volts							
8432	Agricultural, forestry machinery for soil	0.0	0.1	1.3	3.0	1.4	2 B	21
	preparation							
2402	Cigars	0.0	0.0	1.1	-1.3	0.7	13 B	22
1904	Cereal foods	0.4	22.8	1.2	0.1	1.0	2 B	23
9405	Lamps and lighting fittings	0.9	0.3	1.2	1.1	1.1	14 B	24
8462	Machine tools for working metal by forging;	0.5	0.3	1.3	3.5	1.5	6 B	25
	machine tools for working metal by bending,							
	folding, straightening or flattening							
8474	Machinery for working earth, stone, and other	0.5	0.5	1.2	0.7	1.0	5 B	26
	mineral substances							
4008	Plates, sheets, strip, rods and profile shapes, of	0.0	0.2	1.4	3.4	1.7	2 B	27
	vulcanized rubber							
2101	Extracts of coffee, tea or mate	0.0	0.9	1.1	-1.2	0.7	2 B	28
3808	Insecticides, rodenticides, fungicides, herbicides	0.3	0.3	1.2	0.4	1.0	11 B	29
3105	Mineral or chemical fertilizers, mixed	0.1	0.3	1.1	-0.7	0.7	6 B	30
	Electrical insulators of any material	0.1	0.1	1.4	3.8	1.7	1 B	31

HS4	Product name	RCA- 2000	RCA- 2009	Distance	PCI	OppGain	World Trade (\$)	Target rank
8452	Sewing machines	0.1	0.1	1.2	-1.2	0.9	4 B	32
8425	Pulley tackle and hoists; winches and capstans;	0.2	0.1	1.3	2.0	1.3	2 B	33
	jacks							
1701	Raw sugar, cane	0.0	5.1	1.1	-3.1	0.3	9 B	34
2208	Alcoholic preps for beverages	0.0	0.0	1.2	-0.2	0.8	11 B	36
1901	Malt extract	0.3	0.1	1.1	-1.4	0.6	4 B	36
5112	Woven fabrics of combed wool or combed fine animal hair	0.5	0.1	1.3	2.7	1.5	3 B	36
8903	Yachts	0.0	0.0	1.3	2 1	1 E	5 B	38
			0.0		3.1	1.5		
6306	Tarpaulins, awnings and sunblinds	0.4	0.5	1.1	-2.5	0.4	1 B	39
8705	Special purpose motor vehicles	0.0	0.1	1.2	0.5	1.0	4 B	40
8481	Appliances for thermostatically controlled valves	0.3	0.0	1.4	5.2	2.0	25 B	41
1604	Prepared or preserved fish	0.2	0.0	1.1	-2.2	0.4	6 B	42
8503	Parts for use with electric generators or converters	0.0	0.0	1.3	2.2	1.5	7 B	43
9401	Seats	0.3	0.1	1.2	0.2	0.9	25 B	44
3103	Mineral or chemical fertilizers, phosphatic	0.0	1.1	1.2	-1.1	0.7	679 M	45
5703	Carpets, tufted	0.2	1.9	1.2	0.4	1.1	4 B	46
8424	Mechanical appliances for dispersing liquids or	0.1	0.3	1.4	3.0	1.6	7 B	46
	powders; fire extinguishers; spray guns; steam							
	or sand blasting machines							
9607	Slide fasteners and parts thereof	0.4	0.4	1.1	-1.9	0.7	2 B	48
2201	Waters natural	0.0	43.1	1.2	-0.9	0.7	1 B	49
8402	Steam or other vapor generating boilers	0.2	0.2	1.3	2.8	1.4	2 B	50

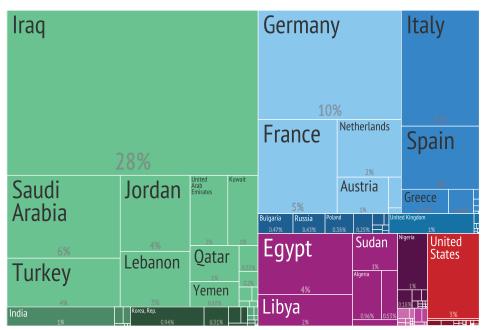
K = thousand, M = million, B = billion

Syria's export destinations

Lastly, possible markets for the country's exports are analyzed. As can be observed in figure 7a, Syria mainly exports to nearby countries in the Middle East (Western Asia) and European countries. The major destination of Syria's exports is Iraq (accounting for 28%), followed by Germany (10%), Saudi Arabia, and Italy (6% each). Figure 7b shows that exports to the Middle East rose strongly after 2005. Exports to Europe had been declining in recent years but exports to Northern Africa were on the rise prior to 2011.

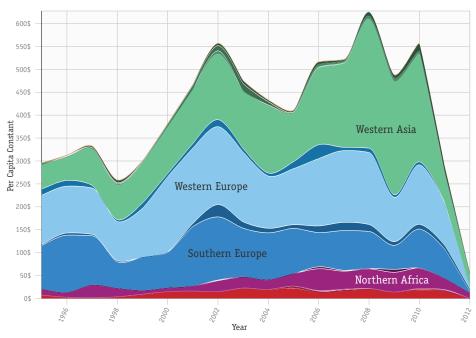
Figure 7 Syria trade partners (2009)

a Export destinations



Syria's exports totaling approximately \$9.8 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 potential, it is possible to identify top export destinations for the country. 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 Syria's trade with Middle Eastern countries was healthy prior to 2009. On the other hand, its greatest opportunity lies in Western European, East Asian countries, and the United States.

Table 4 Trade potential

Importer	Trade Health	Number of Eligible Products	Potential in Eligible Products (\$)	Current Trade in Eligible Products (\$)	Total Trade (\$)
ARE	1.3	62	26 M	36 M	53 M
CHL	0.6	1	54 K	70 K	263 K
CHN	0.3	2	29 M	7 M	8 M
DEU	0.2	37	118 M	49 M	64 M
DZA	4.6	36	1 M	48 M	74 M
EGY	7.6	48	512 K	271 M	310 M
FRA	0.1	39	38 M	21 M	28 M
GBR	0.0	32	54 M	29 M	33 M
IRQ	52.1	30	2 M	2 B	2 B
ITA	0.2	47	62 M	35 M	41 M
JOR	25.4	63	632 K	175 M	209 M
KWT	5.6	59	6 M	41 M	64 M
LBN	18.4	64	1 M	124 M	142 M
LBY	18.6	37	648 K	53 M	72 M
SAU	15.3	52	8 M	329 M	378 M
TUN	1.2	27	2 M	29 M	32 M
TUR	1.9	41	5 M	66 M	85 M
USA	0.0	20	103 M	3 M	5 M
YEM	9.3	42	4 M	32 M	60 M

K = thousand, M = million, B = billion

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