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**THE ROLE AND SCOPE OF INDUSTRIALIZATION IN
ENHANCING THE IMPACT OF TRADE POLICY ON
POVERTY REDUCTION IN TANZANIA**

By

Dr. Timothy S. Nyoni

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1.0 INTRODUCTION

Since 1995 Tanzania has made major progress in economic reforms and macroeconomic stabilisation resulting in strong overall growth and low inflation. Growth since 1995 has resulted in significant reduction of poverty in urban Tanzania. The pillars of the reform-oriented policies since 1996 were:

- (a) Large-scale privatisation. Since 1992 virtually all state-owned enterprises have been privatised.
- (b) Liberalisation. Since 1990, current account transactions, the exchange market, agricultural prices, and marketing boards have been gradually liberalised.
- (c) Microeconomic stabilisation. Tight fiscal and monetary policies have resulted in a rapid decline of inflation from above 20 % in the early 1990s to single digits in the early 2000s.

Past evidence of poverty and growth in Tanzania suggests that reaching the Millenium Development Goal (MDG) of halving the poverty by 2015 would require an overall annual growth rate of 5 % and of about 4.8 % in the rural economy. While the overall growth in Tanzania is consistent with MDG's goals, the rural economic growth falls short of that.

In attempts to ensure the attainment of the MDGs, Tanzania has formulated several policies including the National Trade Policy and the Sustainable Industries Development Policy.

The objective of the Tanzania's trade policy is to achieve a competitive export-led growth for the realisation of poverty reduction (URT2003). The objective is to be achieved through trade liberalisation, export diversification, improved transportation and infrastructure, information dissemination, processing of primary exports for the purpose of value adding and through participation in regional trade arrangements and integration. To assess the extent to which the objective of the trade policy has been achieved requires an examination of the country's growth and export performance and trends in poverty levels.

The Sustainable Industries Development Policy (SIDP) of Tanzania emphasizes the establishment of Export Processing Zones (EPZs), the promotion of the private sector and small and medium scale enterprises as some of the strategies of achieving its policy objectives (URT 1996). Export Processing Zones have been found to have a positive relationship with export performance and economic growth in Sub-Saharan Africa (Kinunda-Rutashobya 2003). SIDP can only contribute to poverty reduction if it results to increased real incomes to the poor.

The general objective of the paper is to shed more light on the linkages between trade, development and poverty reduction strategies in Tanzania during this era of globalisation. The specific objectives are first to trace the implications of Tanzania's current trade policy on the industrial performance; to identify policy options and strategies to enhance the impact of trade and industrial policies on poverty reduction; and thirdly to suggest strategic interventions that Tanzania can adopt to address the existing obstacles and constraints specific to manufactured exports.

2.0 PERFORMANCE OF THE TANZANIA'S ECONOMY AND POVERTY TRENDS

2.1 Profile of Tanzanian Economic Structure, Growth and Poverty

Structure of the Economy

As can be seen from Table 1, the Tanzanian economy has been dominated by agriculture which contributed an average of 47.9 percent to the real gross domestic product at factor cost throughout the 1964-2004 period. Next in importance was trade, hotels and restaurants which constituted 15.2 percent to the GDP underscoring the importance of tourism to the economy. The share of financial and business services in the GDP was 9.6 percent while that of manufacturing industry was 9.5 percent.

There have been marginal changes in the structure of the economy especially during the mid 1980s through the mid 2000s. The most noticeable change has been the doubling of the share of mining from 1 percent during 1985-'95 to 2.3 percent during 1995-'04, mainly due to the discovery of gold. However, the technology in used in the mining sector is capital intensive making growth of the sector less pro-poor.

Table 1: Gross Domestic Product in Constant Prices* (Percentage contribution by Sector)

Years	Agric	Ming	Mfg	Elec	Const	Trade	Trans	Fins	Paos
1964-'66	48.9	2.8	9.0	0.7	3.8	14.3	5.2	9.6	6.7
1966-'84	45.4	1.1	11.1	0.9	4.2	13.8	7.0	9.4	9.2
1985-'94	48.9	1.0	8.7	1.5	5.5	16.3	4.9	9.3	8.4
1995-'04	48.4	2.3	8.4	1.7	4.6	16.3	5.3	10.2	7.6
1964-'04	47.9	1.8	9.3	1.2	4.5	15.2	5.6	9.6	8.0

Notes: The columns for "Less Financial services" and "Total Percentages" have not been shown for technical reasons. The sectors in question are: 1. Agric is agriculture; 2. Ming is mining and quarrying; 3. Mfg is manufacturing; 4. Elec is electricity and water; 5. Const is construction; 6. Trade is trade, hotels and restaurants; 7. Trans is transport and communications; 8. Fins is financial and business services and 9. Paos is public administration and other services.

Source: Computed from URT (1993), and URT (2005).

Growth Experience

During the past four decades Tanzania has experienced varying political regimes which influenced to a significant extent the country's economic performance. As can be seen from Table 2, during 1961-2004, the overall gross domestic product in 1992 prices grew at an average annual rate of 4.05% while the per capita GDP grew at an average annual rate of 1.18%.

Table 2: Overall and Per Capita Gross Domestic Product in 1992 Prices- Percentage Average Annual Growth Rates

Years	Overall gross domestic product	Per capita gross domestic product
1961-1967	6.30	3.70
1967-1985	3.31	0.07
1985-1995	3.18	0.78
1995-2004	5.04	2.17
1961-2004	4.05	1.18

Source: Computed from URT (1993), and URT (2005).

The growth experience, however, displayed remarkable differences between the four different regimes since Tanzania Mainland attained its political independence in 1961. The four regimes were the inherited pro-capitalism regime (1961-67); the strong pro-socialism control regime (1967-1985); the period of softening of controls (1985-1995); and the regime of market-oriented reforms (1995 to date).

1961-1967: Inherited Pro-capitalism Regime

In the period immediately after independence, between 1961 and 1967, the Tanzanian economy was characterized by inherited colonial economic policies and relatively strong per capita income growth of 3.7 per cent (Table 1). As explained in Mwase and Ndulu (2005), investment rates during this regime were high and were supported by high level of domestic savings. Industrial growth was high, import dependent but not for the benefit of the majority indigenous Tanzanians. This prompted the government to promote import substitution policy and promoting agricultural growth through mechanization and use of chemical fertilizers and pesticides. This was done within a fairly open market economy.

In 1967 the government enunciated its move to *ujamaa* or African socialism with the Arusha Declaration. The government objective was to achieve rapid economic growth and achieving self reliance. The government believed that these two objectives could not be achieved without government intervention in terms of public ownership of major industries, especially heavy industry. Along with nationalization of the major means of production went the policy objective of equity with its implication for industrial relocation and pay structures. The *ujamaa* policies had negative effects on the growth of per capita incomes in the immediate years of its implementation 1969 and 1970.

1967-1985: Strong Control Regime

The period of 1967-1985 was one of a strong control regime and economic management based on *ujamaa* principles. The overall and per capita GDP grew at average annual rates of, respectively, 3.31 and 0.07 percent. The combination of collective production schemes, import substitution industrial strategy, adverse exogenous shocks in the end of the 1970s including the end of the coffee boom in 1978, the costly war against Idi Amin's Uganda during 1978-1979 and the oil price shock in 1979 resulted in the thriving of the underground economy.

By the early 1980s, the economic crisis in Tanzania was so deep that the socialist strong control regime could no longer be sustained. By 1985 it was time for a new actor to take over leadership of the country from Mwalimu Nyerere and soften the controls.

1985-1995: Softening of Controls

With the onset of the second phase presidency of Al Haj Hassan Mwinyi in 1985, Tanzania embarked on a series of economic reforms aimed at lessening controls and liberalising the economy. With the softening of the controls, per capita income growth increased from an average annual rate of 0.07 percent during 1967-1985 to 0.78 percent during 1985-1995. The 1985-1995 period was also characterised by high levels of corruption and near abdication of the government from its reformist role from 1990 to 1995 with the consequent slowdown in the economic reform process and exodus of key development partners after 1990.

1995-To date: Regime of Market-oriented reforms

The period since 1995 has been one of deepening persistent market reforms spearheaded by the third phase government headed by the then President Benjamin William Mkapa. During 1995-2004 there was an impressive growth in both the overall and per capita GDP which grew at average annual rates of, respectively, 5.04 and 2.17 percentages. The remarkable growth in this period was a result of, among other things, two important phenomena. One was the diversification of the economic base with mining being the fastest growing sector in the economy growing at an average annual rate of 15.37 percent during 1995-2004 (Table 3). The second was the export oriented nature of the growth with merchandise exports tripling from an average of US\$350 million during 1985-1995 to an average of US\$1,042million during 2000-2004 (URT 2005).

Table 3: Tanzania GDP in 1992 Prices by Economic Activity (Percentage Growth Rates)

Year	Agriculture	Mining and Quarry	Manufacturing	Electric and Water	Construction	Trade and Hotels	Transport and Communication.	Finance and Business	Public Admin and Other Services
1964-1967	3.90	9.13	14.04	8.82	16.37	8.38	11.47	7.13	6.14
1967-1985	3.36	-3.11	2.32	6.28	5.64	4.03	1.76	-0.91	3.48
1985-1995	3.29	6.98	1.66	6.06	-3.70	2.02	4.24	10.46	4.76
1995-2004	4.01	15.36	6.25	4.90	9.37	5.97	5.31	4.37	3.39

Source: Computed from appendix Table A1

Table 4: Tanzania's Manufactured Exports 1995-2004

	Manufactured Exports	Total Exports	Manufactured Exports as Percentage of Total Exports	Average Annual Growth of Real Manufactured Exports
	(Mill.1992 TShs)	(Mill. 1992 TShs)	(Percentages)	(Percentages)
1995	30324.8439	187780.544	16.15	
1996	26345.7111	184896.531	14.25	-13.12
1997	22902.559	155425.13	14.74	-13.07
1998	6987.81452	115121.514	6.07	-69.49
1999	5913.85039	108765.31	5.44	-15.37
2000	8548.02161	131152.639	6.52	44.54
2001	11545.7488	156281.51	7.39	35.07
2002	13651.7297	186588.084	7.32	18.24
2003	17432.1278	234461.965	7.44	27.69
2004	22247.9475	268533.901	8.28	27.63

Source: Computed from BOT (2005)

Recent trends in manufactured exports in Tanzania are encouraging in terms of growth. (See Table 4). As percentage of total exports, however, manufactured exports are currently only half the level they were in the mid 1990s. This is a cause for concern since it implies that the ability of the country to export manufactured goods has been reduced to some significant levels.

Poverty Profile

According to data from the household budget surveys held in 1991/1992 and 2000/2001, the poverty headcount ratio declined marginally from 38.6 percent to 35.3 percent (Table 5).

Table 5: Trends in Poverty, 1991/1992 to 2000/2001

	Population share		Poverty headcount	
	1991/1992	2000/2001	1991/1992	2000/2001
Tanzania	100.0	100.0	38.6	35.3
Rural	82.1	79.0	40.8	38.6
Other urban	12.6	13.6	28.7	25.9
Dar es Salaam	5.3	7.4	28.1	17.6

Source: Household Budget Survey 1991/92 and 2000/01

The largest poverty headcount decline occurred in Dar es Salaam where the poverty ratio declined from 28.1% to 17.6%. Dar es Salaam's population comprised 7.4 per cent of the country's total population; thus the large decline in poverty had little impact on national trends in poverty decline. Rural Tanzania experienced an imperceptible decline in poverty headcount rate from 40.8% to 38.6

Inequality

There was virtually no change in income inequality in the country as a whole in the 1990s. The Gini coefficient in 2000/2001 was 0.34 as compared to 0.33 in 1991/1992.

3.0 ENTREPRENEURSHIP, MANUFACTURED EXPORTS AND POVERTY REDUCTION

In order to promote growth, manufactured exports and the reduction of poverty, it is important to promote entrepreneurship.

3.1 Defining Entrepreneurship

There is a variety of definitions of the term “entrepreneurship”. However research and publications on the term provide an increasingly sharper definition and focus on the subject.

Entrepreneurship is defined as a process of innovation and new-venture creation through four major dimensions -- namely the individual, organization, environment and process -- and aided by collaborative networks in government, education, and institutions. Entrepreneurship involves seizing opportunities and converting them into marketable ideas capable of competing for implementation in the (modern) economy.

The promotion of vigorous industrial entrepreneurship in developing countries requires action in two areas. One is that the overall environmental setting must be done which provides stability, an adequate level of reward for private business initiative, and a well functioning system of price signals which accurately reflects society's economic needs. The other area concerns programmes. Positive programmes are needed to aid the emerging small industrial entrepreneur to upgrade critical skills, to increase and upgrade the entrepreneur's access to important technological and market knowledge and to enable the entrepreneur benefit from better quality, less expensive factor inputs by means of improved institutional arrangements.

3.2 The Entrepreneurial Policy Setting

The ease and scope of entrepreneurial activity is strongly conditioned by the environmental setting in the sense of having a good government, an expanding economy, human resource development, natural resource development, well functioning basic utilities and services (such as roads and transportation facilities) and well-defined laws, regulations and procedures.

One of the most binding factors for the development of entrepreneurship is road network and transportation. With “good” and efficient road network there would be many entrepreneurs entering the (new) markets (and quitting if business prospects so dictate). Competition and entrepreneurship would thus thrive.

The Government of Tanzania has a great role and capacity to improve the environmental setting. The civil society should also chip in where possible. Efforts to promote entrepreneurship should go hand in hand with efforts to expand the domestic economy and, therefore, the domestic market for the goods and services produced by the local entrepreneurs. Through its macroeconomic and sectoral policies the

government can influence the performance and growth of the domestic economy provided that the policies are well resourced and implemented.

Enhancing vigorous entrepreneurship calls forth the development of human and natural resources. In this respect both the Government and the civil society (non-governmental organizations and community based organizations) have a role to play. However, the government (through its vision) has to provide leadership for the sake of sustainability and credibility. Measures should be taken to increase the number and quality of people with energy, education, motivation and skills required for modern-type economic achievement as entrepreneurs and managers, technicians and skilled workers. Deliberate efforts must also be done to develop farm products, forest products, clay, limestone and many other industrial materials which, if properly developed, provide a resource base for specific lines of industry. Resource surveys, followed by developmental action, help to create a favourable environment for industrial undertakings.

The provision of the required and reliable economic infrastructure is a necessary component for promoting entrepreneurship. There should be reasonably good facilities for transportation, communication, water supply and power supply. The newly emerging (small) firms should also be able to find reasonably adequate services like banking, insurance, wholesale trade, construction, and the installation and repair of equipment.

If industry and entrepreneurship is to prosper, the laws, regulations and procedures in Tanzania should permit and encourage the starting and establishing of the legitimate business activities which are necessary for modernization and growth. This calls forth streamlining and simplifying registration procedures and reduction of the multiplicity of taxes and tax rates.

4.0 IMPLICATIONS OF TANZANIA'S TRADE POLICY ON THE INDUSTRIAL PERFORMANCE

Tanzania's trade policy emphasises liberalisation which in turn allows foreign firms to enter the domestic market and compete with firms. Domestic manufacturing industries have less capacity to compete the many foreign firms in both the local and foreign market.

Although the trade policy emphasises the importance of the provision of transportation and communication infrastructure, studies on Tanzania and many other Sub-Sahara African countries suggest that infrastructure is a statistically insignificant determinant of manufactured exports (Clarke 2004).

The trade policy does not emphasise the establishment of large firms. It is only large firms which can easily mobilise finances and other resources including modern technology required to improve efficiency and increase manufactured exports.

5.0 CONSTRAINTS TO MANUFACTURED EXPORTS

Exporters of manufactured exports face some combinations of the following constraints as enumerated in the study by Clarke (2004) on eight Sub-Saharan counties:

- *Tariff and non-tariff barriers* in the destination countries. It is argued that these barriers have been significantly reduced.
- *Firm size*. Larger firms can more easily mobilise the resources to cover large fixed costs, have better access to finance than do smaller firms. Large firms, thus can export more (manufactured goods) than smaller firms
- *Ownership*. State ownership of may or may not discourage export. On the one hand, state-owned enterprises are less likely to engage in exporting. On the other hand, state-owned enterprises are better placed to negotiate their way past regulatory barriers and might find it easier to access government programmes designed to encourage exports.
- *Internet use*. Firms connected to and which use internet tend have been found to export more than those not using the internet.
- *Human capital of the management*. Firms whose managers are learned or posses tertiary education (university degree) tend to have more contacts abroad and export more.
- *Transformation infrastructure* was found to be statistically insignificant.

6.0 POLICY OPTIONS AND STRATEGIES TO ENHANCE THE IMPACT OF TRADE AND INDUSTRIAL POLICIES ON POVERTY REDUCTION

- Improve the business environment. This requires streamlining the multiplicity of taxes, reduction of tax rates; ensuring stable and sufficient electricity and water supply, reducing cost of financing, improved tax administration, improved accessibility to finance, and reduced financing. (Tanzania Investment Climate Assessment 2003).
- Reduce restrictive trade and customs regulations and improve customs administration. Studies on Tanzania and Zambia suggests that improving policy in these areas could have a big impact on exports. Exports as a percentage of GDP could increase by more than 4%. (Clarke 2004).
- Promote entrepreneurship. Business firms should improve manufacturing skills, innovation, and export capacity. This requires the co-operation of the education system, the government, and the private sector.
- Promote the rural economy. This is important especially if poverty is to be reduced. The rural economy should grow by more than 5 % annually. One way to promote rural economy is to promote manufacturing which will increase the market for rural output.

7.0 CONCLUSION

The general objective of the paper is to shed more light on the linkages between trade, development and poverty reduction strategies in Tanzania during this era of globalisation. The specific objectives are first to trace the implications of Tanzania's current trade policy on the industrial performance; to identify policy options and strategies to enhance the impact of trade and industrial policies on poverty reduction; and thirdly to suggest strategic interventions that Tanzania can adopt to address the existing obstacles and constraints specific to manufactured exports.

In this paper, we have argued that since 1995 Tanzania has made major progress in economic reforms and macroeconomic stabilisation resulting in strong overall growth and low inflation. Growth since 1995 has resulted in significant reduction of poverty in urban Tanzania.

Past evidence of poverty and growth in Tanzania suggests that reaching the Millenium Development Goal (MDG) of halving the poverty by 2015 would require an overall annual growth rate of 5 % and of about 4.8 % in the rural economy. While the overall growth in Tanzania is consistent with MDG's goals, the rural economic growth falls short of that.

The paper ended with policy options and strategies to enhance the impact of trade and industrial policies on poverty reduction. These included improving the business environment; reducing restrictive trade and customs regulations; improving customs administration, promoting entrepreneurship and promote the rural economy.

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APPENDICES

**Table A1: Gross Domestic Product in Constant Prices by Kind of Economic Activity
(1992 = 100)**

Year	AGR	MING	MFG	ELH2O	CONSTR	TRADH	TRANS	FINANS	PAOS	LESS	GDPfc
1964	40.85	93.29	39.51	16.69	26.95	34.24	37.88	38.04	27.48	18.88	45.80
1965	40.10	108.01	44.72	17.29	28.10	36.28	39.14	40.87	32.56	28.42	47.30
1966	45.97	127.14	52.66	20.10	31.51	42.16	47.19	40.87	30.56	28.98	53.24
1967	46.00	121.25	58.59	21.51	42.47	43.59	52.47	46.77	32.86	57.95	55.44
1968	47.69	90.64	62.88	23.52	44.72	48.54	60.46	46.89	33.88	17.64	49.64
1969	47.97	98.00	68.92	26.74	41.61	49.72	63.04	49.28	34.18	18.76	50.77
1970	49.91	64.16	71.81	29.96	46.40	50.27	71.32	50.46	38.38	21.82	52.78
1971	49.30	100.65	78.65	31.36	53.96	49.66	79.61	52.91	42.20	25.31	54.63
1972	53.34	78.87	85.26	34.58	57.07	50.59	85.01	54.96	47.48	27.33	58.13
1973	53.85	60.33	89.06	37.19	59.33	53.08	88.56	57.35	51.31	30.19	59.70
1974	51.63	58.27	90.28	41.42	58.63	54.56	93.78	61.45	60.38	30.82	60.46
1975	56.00	48.27	90.58	45.24	55.63	54.87	97.56	62.23	70.09	31.52	63.56
1976	58.70	62.98	106.80	44.03	51.02	55.79	101.16	63.22	79.26	29.56	67.44
1977	61.10	60.50	105.65	43.20	54.24	56.64	91.06	63.54	74.32	32.03	67.71
1978	63.04	52.12	113.89	40.76	47.16	59.37	89.40	64.79	75.53	37.32	69.15
1979	67.57	59.09	103.91	39.09	50.15	60.36	89.69	65.38	79.97	41.61	71.16
1980	67.50	60.54	97.33	53.30	54.05	57.91	113.33	72.69	83.78	42.07	72.94
1981	70.04	46.70	90.76	45.13	49.43	57.14	99.82	74.27	84.99	41.44	72.57
1982	71.52	32.62	69.05	35.27	44.80	55.80	84.94	63.29	76.81	39.52	68.20
1983	78.90	27.22	68.71	38.38	26.83	59.47	78.20	60.57	92.67	33.46	72.42
1984	84.92	31.43	71.43	35.11	30.38	65.07	91.12	59.32	92.39	33.39	77.13
1985	80.64	70.81	86.57	60.60	107.99	85.38	70.64	40.02	58.74	64.27	77.06
1986	84.10	64.74	87.08	68.58	113.79	83.73	73.24	42.30	53.85	71.13	78.48
1987	85.19	64.02	90.62	70.85	73.57	87.15	80.41	80.74	76.84	72.41	83.98
1988	87.06	63.17	93.44	77.47	90.57	89.53	83.00	85.37	84.35	74.34	87.70
1989	90.43	71.35	98.30	84.52	77.93	91.44	84.84	93.37	87.56	91.63	89.95
1990	95.37	83.14	102.31	91.21	101.68	98.22	85.29	94.99	90.19	94.12	95.56
1991	98.78	92.84	104.22	101.31	94.49	100.68	87.57	96.35	94.69	95.51	98.21
1992	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00
1993	103.10	108.19	100.62	100.86	85.62	99.59	100.10	104.79	96.14	111.89	100.40
1994	105.28	124.44	100.43	102.85	86.82	100.73	101.03	107.62	96.06	120.73	101.80
1995	111.42	138.99	102.06	109.17	74.04	104.26	107.01	108.23	93.48	114.21	105.43
1996	115.73	152.41	106.98	121.30	79.68	107.86	108.17	108.66	94.94	102.79	109.86
1997	118.56	178.46	112.33	124.02	86.18	113.26	113.46	117.03	97.95	126.91	113.49
1998	120.82	227.36	121.32	130.88	94.67	118.61	120.49	123.53	100.59	137.82	118.02
1999	125.82	248.01	125.72	135.96	102.91	125.67	127.52	128.60	104.08	142.53	123.62
2000	130.06	282.49	131.76	143.95	111.56	133.81	135.24	134.63	107.79	144.51	129.66
2001	137.21	320.63	138.30	148.22	121.25	142.78	143.76	139.02	111.56	148.12	137.10
2002	144.04	368.72	149.36	152.79	134.59	152.78	152.96	145.72	116.09	152.27	145.55
2003	149.80	435.09	162.21	160.31	149.39	162.71	160.59	152.15	120.84	157.60	153.80
2004	158.72	502.96	176.16	167.86	165.83	175.73	170.48	159.07	126.22	170.15	164.16

Source: Computed from URT (1995) and various URT Economic Surveys.