



## **MANUFACTURING IMPERATIVE FOR REGIONAL DEVELOPMENT IN SOUTHWEST NIGERIA**

A Paper presented by **Mr. Oluseye Oyeleye**; Director General, DAWN Commission. At the 35th AGM of the Manufacturers Association of Nigeria South West Branch.

### **Protocols!**

#### **Introduction**

Manufacturing, without argument, is a vital driver of development. Although there is an ongoing debate about the future driver of growth and development between Manufacturing and the Service sector, it is however evidenced that Manufacturing has the highest multiplier effect on any major sector of the economy. The rapid growth of an economy largely depends on the productivity of manufacturing. Manufactured goods are crucial trade, service industries, economic value recreation (income and employment), poverty reduction and national power. Over the last 100 years, the "Great Powers", or most powerful four or five countries have been determined by their capacity to produce manufactured goods; they have control over 70 percent of global industrial productions, which are used to generate wealth and military power.

#### **About DAWN Commission**

DAWN, The Development Agenda for Western Nigeria, is a technocratic organisation established by the Southwest States to midwife the development aspiration of the Western Region of Nigeria.

DAWN Commission is both a Document and a Process. It sets out a clear framework for the Region's objectives, priorities, and major policy thrusts; one of these is the OneBloc Strategy Document of the Commission. It also provides roadmap upon which Governments, Development Partners, the Private Sector, and Civil Society can ride on to drive a development agenda – A short, medium and long-term framework for achieving the Regions development goals and aspirations.

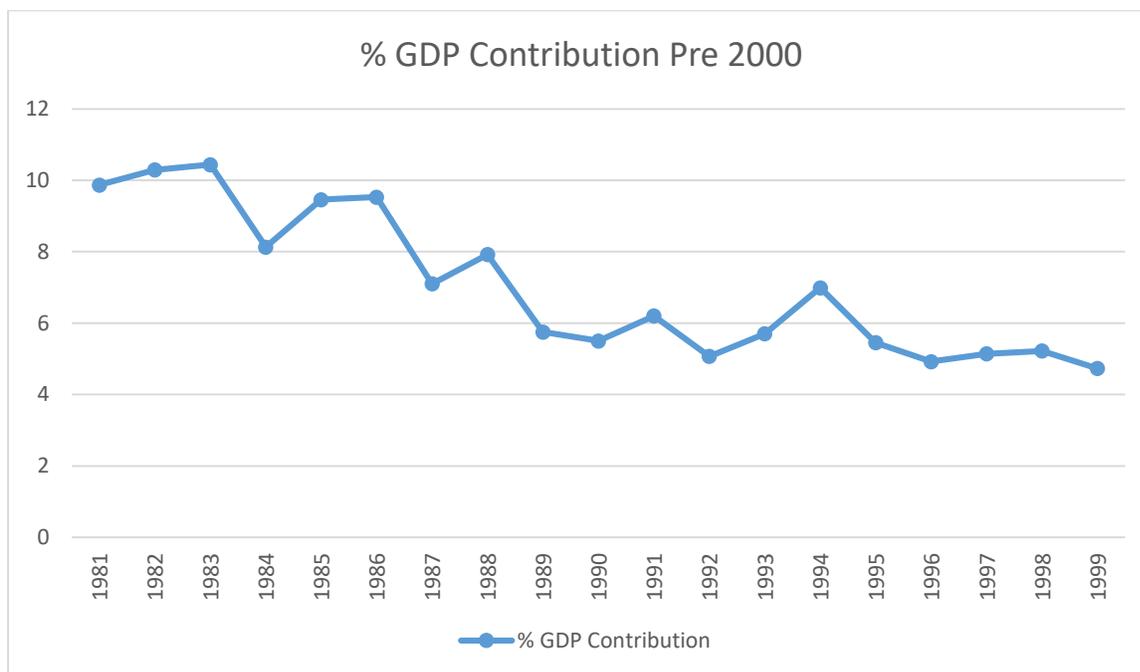
At DAWN, Commerce and Industry (with a special focus on manufacturing and SMEs) are one of our major pillars. We build up strategies for promoting commercial activities and reducing the impediments/constraints to all production activities. We have an

Investment Desk which is proactively working to enhance ease of doing business in the Region while thinking through ways to optimise the Region's economic potentials for development.

### Historical accounts of Manufacturing in Nigeria

It is useful to consider some historical accounts and statistical evidence as recorded by Nigeria Bureau of Statistics, on the evolution of Manufacturing in Nigeria and define the significant contributions of Southwest (Western Nigeria) Manufacturers to Nigeria's growth process.

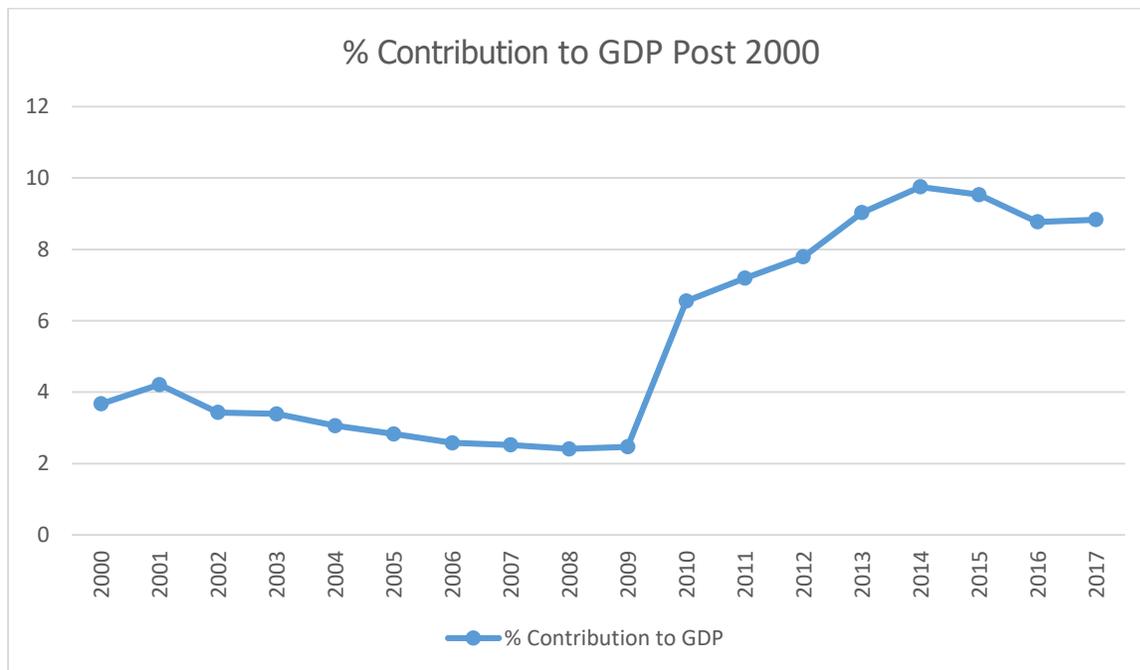
Prior to the 1970's oil boom, manufacturing contributed approximately 10% to Nigeria's economic output. Thereafter, concentration on oil and increased revenues from oil caused the sector's contribution to the Gross Domestic Product (GDP) to drop. In the early 1980's, the fall in world oil prices led the nation into recession and triggered policy attention back to the manufacturing sector. Price manipulation through export and import subsidies during the recession encouraged the importation of intermediary inputs and expanded assembly based industries making the sector contribute 7.83% to total economic output. However, the price manipulation discouraged domestic manufacture of inputs and investment in the infrastructure and human capital required to manufacture in the future. This again fell the share of Manufacturing to economic growth.



DAWN Commission, 2018

In 1987 import bans on raw materials were imposed under the World Bank Structural Adjustment Programmes (SAPs), encouraging import substitution. This, combined with the Privatisation and Commercialization Act of 1988, encouraged a higher degree of efficiency to be achieved in manufacturing. A slight increase in the share of manufacturing in economic output of 0.62% points was observed from 1986-1988.

Throughout the 1990s and 2000's, Nigeria continued to rely heavily on the export of oil, allowing manufacturing to remain in decline as evident in its contribution to GDP. However, a few key industries, such as beverages, textiles, cement, and tobacco kept the sector afloat.



DAWN Commission, 2018

The upswing of the sectoral performance in 2010 with total manufacturing output in the formal sector amounting to N6.84 trillion can be attributed to the implementation of the power sector reforms and the rebasing of the country's GDP from a 1990 base year to 2010 base year. It further increased to N8.17trillion in 2011 and N9.82trillion in 2012. As at 2015, manufacturing share of the GDP was N8.97trillion, it however reduced to N8.89trillion in 2016 due to the scarcity of foreign exchange. Also, the harsh operating environment took its toll on the operations of the manufacturing sector. In 2016, the country's manufacturing ranked 117<sup>th</sup> in the World and 24<sup>th</sup> in Africa according to the

IndexMundi. The sector, however, picked up again in 2017 contributing 8.83% to the GDP.

Till this day, manufacturing production is mainly located in Southwest Nigeria because of its numerous potentials, in terms of market and input access.

### **Southwest Manufacturing Potentials**

The history of the development of manufacturing in Southwest dates as far back as 1940/50s where small scale (establishment employing less than 10 persons) and large-scale industries (establishment employing more than 10 persons) were surveyed to characterize their contributions to the economic development of Western Nigeria with manufacturing activities including Soap making, Clay pot making, and Tin smithy, Block making, etc. (*Ministry of Economic Planning and Reconstruction [Statistic Division, Ibadan, 1970]*).

*Examples* of early Manufacturers in Southwest Nigeria include:

1. **Candido Joao Da Rocha**, a native of Ilesha and was a slave returnee from Brazil who is believed to have established the Iju Water Works, that served the entire Lagos in the 1920's before it was taken over by the colonial administration.
2. **The Odutola Brothers**(1932-1948)  
**Adeola Odutola** (1902-1995) ventured into Sawmill and Gold mining at Ilesha and he was a major agent for John Holt in Nigeria. As an outstanding Nigerian entrepreneur, he ventured into the production of rubber-goods, tyres and tubes. He established various manufacturing factories in Nigeria, spanning the transport, food industry, breweries, beverages, education, etc.

**Jimoh Odutola-Jimoh** pioneered the manufacturing of rubber and plastic foam with his establishment of the Nigerian Rubber Foam Company in 1958, and the Nigerian Plastic Foam Company in 1960. He started the first tyre factory in Nigeria, the first Foam factory in West Africa and the first man to discover raw gold in Nigeria. According to Jimoh, the engine of growth and development of any country rest on its industrialists.

Jimoh's Tyre Company was invited by the governments of Kenya and Ghana to come and set up similar factories.

3. **Chief (Mrs) Bisoye Tejuosho**, high-flying Nigerian business woman from Abeokuta. In the early 1950s, she became an agent of the UAC and Vono industry and later set up a Teju industry, a firm specialized in foam manufacturing.
4. **Iyalode Wulemotu Aduke Kehinde** pioneered the distillery of Local Gin, using brewed tea, as a colourant, known in the Gbongan neighborhood then, as, - "Ogogoro Wule" in the 1960s, and also diversified into produce buying, transportation, sawmill and Petroleum business. She was described in a tribute by Justice Bolarinwa Oyegoke Babalakin, – a retired Justice of the Supreme Court of Nigeria, as a woman of "business sagacity"....**and many others...**

Southwest Nigeria, one of the constituent parts of the Nigerian federation consists of 6 states namely Lagos, Ogun, Oyo, Osun, Ondo, and Ekiti. The Region which plays host to over 60% of Nigeria's industrial capacity, has the largest manufacturing agglomerations providing 27% of national manufacturing jobs, while also holding two of Nigeria's most important deep seaports – the Lagos Port Complex, Apapa and Tin Can Island. These ports, handle over 100 million tonnes of goods per annum valued at approximately \$2 billion (2012). Southwest land borders account for 60% of the trading and commercial activities in Nigeria. It is the only Region in Nigeria with access to both land and sea borders.

By estimates, the Southwest region was the third largest economy in the continent of Africa in 2014 with the lowest poverty rates (16%) outpacing the other Regions in the country. Being a major driver of the country's economic diversification agenda, the Region contributes about 60% of the GDP in Manufacturing, Wholesale and Retail Trade. The Region is the choicest destination for foreign investment in the country, recording as high as \$69.1bn (2007 – 2013). It is strategically positioned to access and retain investible funds both domestically and internationally. Its proximity to seaports, airports and its geographical position as a land border post amongst others, further accentuate this relative business-attractive strength of the Region. Indeed, of the (18) major investments worth N658.4bn (\$4.12bn) into the country since mid-2012, ten (13) are in the Region.

Private sector initiatives thrive in the Region, currently having the highest number of Small and Medium Scale Enterprises (about 6,648 Small Scale Enterprises and 541 Medium Scale Enterprises). Southwest alone holds over 25% of total Micro enterprises, over 36% of the small enterprises and over 33% of the medium scale enterprises in Nigeria according to NBS Survey report, 2013 with Lagos having the highest number of micro enterprises (3,224,324), followed by Oyo state (1,864,954).

Apart from having a good number of Free Trade Zones in the Region, Lagos and Ogun aid international trade in Nigeria, the access route to the expansive market of the

Economic Community of West African States (ECOWAS), the major international airway and seaway in Nigeria.

Manufacturing industries in the region include food, beverages and tobacco, chemicals and pharmaceuticals, rubber and foam, cement, plastic products, basic metals, steel and fabricated metal products, pulp and paper products, electrical and electronics, textile manufacturing, furniture and wood products, motor vehicles and miscellaneous assembly, etc.

### **Southwest Nigeria Regional Development Focus**

Southwest Regional development aspiration is hinged on the necessity to organise and optimise the competitive advantages of the Region, to position it as the fore and most preferred place to live, work and invest in Africa. This lofty dream is based on the principle of OneBloc and is achievable with sustained collaborative efforts of all critical elements in the Region, with the Private Sector a principal element. The focus is to build an integrated, well supported, private sector-led, highly diversified, industrialised and innovation-based Regional Economy by leveraging Regional competitive and differentiated advantages especially business competitiveness, regional strengths, and market opportunities.

These regional developmental objectives are wrapped around the following focus:

- i. Economic Development (Agriculture, mineral resources, Housing, etc.)
- ii. Human Capital Development (Education, Health, Sports, etc.)
- iii. Commerce and Industrial Development (Manufacturing, MSMEs, etc.)
- iv. Infrastructural Development (Transport, Power, ICT, etc.)
- v. Security, Law, and Enforcement
- vi. Culture, Tourism, Arts, and Heritage
- vii. Environmental, Climate resilience and Habitat
- viii. Civil Service, Good Governance, and Inclusive Institutions

### **Manufacturing and the Development of Southwest Region**

Considering the history of manufacturing in Nigeria and the potentials of Southwest Region, understanding the channels through which manufacturing growth has an impact on the economy is essential to assess how manufacturing can mobilise higher growth and development, as well as employment creation in Southwest Nigeria. According to Jon Rynn, the author of "Manufacturing Green Prosperity: The power to rebuild the American middle class", manufacturing is the best route to development. So, why is manufacturing a big deal for Southwest Development?

1. **Manufacturing is a root of economic power:** This path has been the strategic achievement of developed nations. They create high-quality manufacturing sector in order to develop national wealth and power. Erik Reinert (A Norwegian development Economist) shows this in his book "How Rich Countries Got Rich and Why Poor Countries Stay Poor." Attributing the rise of England in the 19th century, to the rise of the US, Germany, Japan and the USSR in the 20th, to the newly industrialised countries like Korea, Taiwan, and now China to the quality of their manufacturing sector, manufacturing has been the key to prosperity. In a similar vein, for an increasing socioeconomic development to be recorded in Southwest Nigeria, manufacturing activities must be in top gear.
2. **Manufacturing is the foundation of Innovations, Research, Development and Technology.** Productivity growth and technological advancement lie at the root of economic development, which is why manufacturing is so important. Manufacturing provides the foundation for many kinds of innovations. The most powerful nations and Regions in the world — the "Great Powers" as they are called — are those that control the bulk of the global industrial production and manufacturing of technologies. That is, moving beyond the establishment of factories and production of more goods, to producing know how to make the machinery that makes the goods.

The key to power, therefore, is to make the "means of production." These innovations and technologies are now the motivators for development. Most technological breakthroughs have been associated with the manufacturing sector in advanced Regions, such as the steam engine, the internal combustion engine, airplanes, steel ships, and semiconductors, etc. In fact, efficiency across all sectors of the economy was attributed technology diffusion from the manufacturing sector (The Guardian, 2015)

3. **Manufacturing is the most overarching driver of economic growth.** Manufacturing firms and their subsidiaries are the main drivers of economic growth. Manufacturing outputs serve as input to produce other goods or services in the other sectors of the economy. The technological and productive potential of manufacturing leads to explosive economic growth through its multiplier effect on MSMEs who have the potentials for developing domestic linkages for rapid and sustainable industrial development. With the Region playing host to 23%, 36% and 33% Micro, Small and Medium Scale enterprises respectively, Manufacturing is a big deal to sustain these enterprises for economic development activities.
4. **Global trade is predominantly goods than services:** According to OECD-WTO data, 67% of world trade among regions is merchandise trade in 2014 and 70% in 2015— that is, only about 30% of world trade is in services. Hence, manufacturing becomes an imperative to increase the Region's participation in the Global Value Chain

which is the new order of production, predominantly manufacturing. Multinationals are beginning to consider the manufacturing base of their prospective investment location for plant siting, partnering/collaborating with existing manufacturing firms. The Manufacturing sector, therefore, determines the Regions access to these foreign domestic investments.

5. **Other Sectors are dependent on manufactured goods:** Many have argued that Services are the future driver of development. However, other sectors of the economy rely on the derivatives of the manufacturing sector. Jon Rynn (2011) defined Services as mainly "the act of using manufactured goods". This further reiterates the importance of Manufacturing to foster rapid development in Southwest with about 60% of the country's banking assets, 67% of its insurance assets, and high population of wholesale and retail traders. Retail and wholesale are the act of buying and selling manufactured goods. The same goes for real estate, which is the act of buying and selling a "real" or physical asset, a building which had been constructed using manufactured products. Even health is the act of using medical equipment and drugs, which are all outputs of manufacturing.

In the same vein, Finance involves the redirection of surplus resources that the nonfinancial sector of the economy produces, which means that indirectly, even finance is dependent on manufacturing as well as other sectors; the surplus generated by leveraging technologies of production and then redirected to the deficit sectors. To sum up: the health of the economy is critically dependent on the health of the manufacturing sector.

6. **Manufacturing creates good jobs.** Most jobs, directly or indirectly, depend on manufacturing. The sector provides thousands of more high-quality, long-term, well-paying jobs. This can be noted in the influx of job seekers from other Regions in the Country. Interestingly, each manufacturing job supports other entities in the economy; both social (families, religion affiliates) and economic entities (small businesses, etc.) These improve the wellbeing of a wide range of actors. Hence, manufacturing is central to the economy.
7. **Manufacturing enhances public expenditures on developmental projects:** Taxes are one of the major sources of income for the government. These taxes, if complied to, increase the fiscal strength of the government to carry out development activities at the national and sub-national level. Invariably, manufacturers are enablers of developmental projects via their taxes to the government.

Export earnings from manufacturing are another major contribution to growth and government revenue.

8. **Manufacturing provides the path to development:** The Manufacturing sector can drive the Southwest Region towards the achievement of the global goals as contained in the Sustainable Development Goals (SDGs). In specifics, manufacturing can aid the achievement of SDGs 1-No poverty, SDGs 8-Decent work and Economic growth, SDGs 9- Industry, Innovation, and Infrastructures, SDGs 13- Climate Action. The achievement of these goals and their various targets cannot be achieved in isolation of economic agents, where manufacturers are key.

One other way manufacturers enhance development is through their Corporate Social Responsibilities (CSR). The independent social and economic projects carried out by manufacturers, ranging from Youth and Women Empowerments programmes, Poverty alleviation programmes, local content development policies, Water and Sanitation facilities, etc. all increase the Region's developmental potentials.

## Tracking the importance of manufacturing within the Southwest Developmental Focus

The track board below summarise the multi-level channels where manufacturing transmits to the achievement of Southwest Developmental aspirations via its importance explained above:

		SOUTHWEST DEVELOPMENTAL FOCUS AREAS							
		Economic Development	Human Capital Development	Commerce and Industrial Development	Infrastructural Development	Security, Law and Enforcement	Culture, Tourism, Arts and Heritage	Environmental, Climate resilience and Habitat	Civil Service, Good Governance and Inclusive Institutions
<b>IMPORTANCE OF MANUFACTURING</b>	Economic Power	✓		✓					
	Innovation & Technological Development			✓	✓	✓			✓
	MSMEs Sustainability	✓		✓			✓		
	Global Value Chain Positioning	✓		✓			✓	✓	
	Job Creation		✓	✓		✓			
	Development of other sectors	✓	✓	✓	✓		✓	✓	✓
	Revenue to the Government		✓		✓	✓		✓	✓

	CSR		✓			✓		✓	
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## Challenges facing manufacturing in its role as a driver of Regional Development

From our various researches, the numerous challenges facing the manufacturing sector in the Region can be categorised into infrastructure, Financial, Technical, regulatory and economic constraints.

- i. **Infrastructure Constraint:** Poor condition and poorly developed Infrastructure (Transport systems, educational and health facilities, potable water, electricity, etc.). Poor energy supply, for example, is a key infrastructural challenge that has an immense effect on manufacturing production output. Our research shows that power accounts for 40-45% production cost in the Region.
- ii. **Financial Constraint:** Inadequate credit, inadequate financial services, high debt burden. This is due to inefficient financial policies, inefficient financial market, high risk of lending, corruption, bureaucracy, unstable exchange rates, low returns from investments.
- iii. **Technical Constraint:** Poor technological base, inadequate availability of viable technology and inputs, low productivity, high production hazards, inadequate affordable skilled labour etc. These are due to low support (business development services), inadequate government policy, poverty, low level of awareness, lack of access to and inadequate research, increasing the price of inputs.
- iv. **Regulatory Constraints:** The bureaucratic hurdles in the various standards and charges set by multiple regulatory agencies leading to disruptions to manufacturing operations. Examples include heavy charges to manufacturers, long delays in product registration and certification, etc.
- v. **Economic Constraint:** Economic mismanagement, the high cost of production, low access to market information, high investment risks, forex, etc. These can be attributed to socio-economic factors including policy instability, ineffective government policies, high inflation rate, multiple taxations, the inadequate flow of credit, corruption and poor resource management.

## The prospect of Manufacturing in Southwest Nigeria

Moving beyond the current challenges, the prospects for manufacturing are bright in Southwest Nigeria. The Region is increasingly seen as a viable and preferred location for local and global manufacturers. In 2014, Ogun State and Lagos State became top manufacturers' investment destinations in Nigeria. While Ogun, which is now Nigeria's industrial hub, recorded N377 billion worth of investments within the period, Ikeja, Lagos State returned investments worth N39.86 billion. Ogun State's represents 78 percent of N483 billion worth of investments made in the whole of the manufacturing sector within the period, while Ikeja shares 8.3 percent. "These statistics revealed that

the majority of manufacturing investments were directed towards Ogun industrial axis, which consists of Otta, Agbara, Ibafo/Mowe and Shagamu industrial areas,” said MAN, in its January-July 2014 economic review.

With the ongoing construction of the Lagos-Ibadan railway, and the Araromi/Ondo State, Akoko/Lekki in Lagos State, it is expected that the interland states will also experience a boom in investments; as accessibility to the parts becomes a lot easier. It will take 45minutes on the rail from Apapa to Ibadan once completed. Araromi in Ondo State to Akoko/Lekki in Lagos State road is 50km journey, meaning in less than an hour you can leave Ondo State and be trading or clearing your goods at the Lekki deep sea port under construction by Lagos State Government.

Data also revealed investments in Oyo/Ondo/Osun/Ekiti as N19.2 billion within the period, making Southwest the most competitive in the manufacturing sector in Nigeria.

In a bid to fuel the sector and drive economic growth, States in the Region are making pro-growth manufacturing policies to fully optimise the development potentials in the sector. For example, Lagos State its State Development Plan in 2014 hopes to increase manufacturing share in the GDP from 10% to 43%.Currently, manufacturing contributes about 29.6% of the GDP of the Lagos State according to the data released by the Manufacturers Association of Nigeria (MAN).

Also, About 82% of the Lagos – Ibadan corridor rests in Ogun State, the current industrial and manufacturing hub of Southwest and Nigeria. At DAWN Commission, we are determined to help our states develop plans and strategies to leverage these huge economic potentials of the Region.

Manufacturing in Southwest forms a significant part of Nigeria’s economic landscape and could propel Nigeria into the manufacturing big leagues along with BRICs countries such as China and India. Southwest accounts for over 60% of manufacturing employment in Nigeria, significantly contributing to the national GDP constituted by manufacturing.

Following the above, the opportunities for Manufacturers in Southwest can be summarized into:

1. Growing Population
  - Ready labour pool for production
  - Ready markets for local consumption.
2. Strategic location
  - Land, Air, Sea and Rail connections to markets in central and western Africa region, Europe and the rest of Nigeria,
  - The easy flow of both raw materials and processed goods.
3. Availability of land and resources for expansion

4. Opportunity for backward integration
  - Availability of vast industrial zones
5. Availability of Research and Training Institutions for Staff development
6. State Governments increasing focus on upgrading urban infrastructures such as transport facilities, power supply, water supply and other important facilities.(Ijeoma and Tamilore, 2015)

### **How can we unlock manufacturing potentials in Southwest for Development?**

1. Development of an advanced Manufacturing Development Strategy: The Region needs a well-articulated development strategy for the manufacturing sector to fast-track the Region's attainment of the current industrial revolution. This strategy will contain elements such as a competitive tax system, free and fair trade, education and talent development, energy efficiency, technology, and innovation etc. – DAWN Commission is taking the lead in these areas.
2. Fostering an advanced manufacturing ecosystem: Apart from articulating a development strategy, there is need to develop an integrated portfolio of public policies that can enhance the overall innovation capability of manufacturers to design, develop and manufacture a wide variety of sophisticated products. Technology and Innovation are currently the drivers of competitiveness. The Region and manufacturers must begin to leverage this.
3. Export incentives: This is one of the key public policies that need to be put in place by the government. There should be provision of incentives for firms to become more export-oriented. Rapid income growth is often associated with the expansion of manufactured exports; a microeconomic analysis of African firm data indicates that 70 African firms that do participate in the exports market tend to improve productivity through a 'learning-by-exporting' process (Måns and Francis, 2002)
4. Detailed Market Knowledge: Manufacturers need a highly detailed understanding of specific emerging local and international markets, as well as the needs of existing customers to leverage the potentials of Southwest. Manufacturers must build their Research and Development (R&D) capacities, their expertise in data analysis and product design as appropriate for their respective market. Manufacturers must carry out their own research to have an up to date knowledge of the constantly changing market interests and characteristics
5. Manufacturers Adoption of Research and Innovations: Manufacturers need to cultivate and nurture the culture that supports ongoing innovations. Local and

international markets increasingly demand for innovative products from manufacturers. Failure to do this will reduce the market for such products. Therefore, Manufacturers innovate their operations from processes to staff training, across products and marketing. Improving existing processes will help to minimize wastes, identify efficiency issues and non-performing lines.

6. Building Partnership: Collaboration between/among the State and private manufacturing organisations (PPP) need to be increasingly established to drive the talent and innovation agenda for the manufacturing sector in Southwest.

Another partnership and collaboration highly importantly to unlock the region's potential are between the government, the manufacturing sector, and the educational institutions. These actors need to collaborate to ensure that skills and training offered in schools fit the needs of the manufacturers who are employers. Since employers need qualifying, computer-savvy factory workers and agile managers for complex local and global supply chains, a collaborative effort is required to improve the education system.

The good news here is that DAWN again has taken the lead and we are collaborating with the UI Research Centre to bring the gown to the Industry.

## **Conclusion**

Undoubtedly, manufacturing plays an irreplaceable role in driving growth and economic development; it is a necessary precondition for sustained economic growth. Although, the manufacturing sector of the Region, with all its prospects, is highly under-utilised with a huge dependence on import despite different government policies and orders. Irrespective of this, manufacturing is important to Southwest Economic future. With a joint effort, manufacturing potentials in the Regional can be unlocked for sustainable development of Southwest.

We aspire to have a Region of Middle and high-income class. Manufacturing can take us there.

Thank you.

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