

Table 1: Impact of foreign export spillovers: checks

Explained variable	new ODT export link in t+1					
	(1)	(2)	(3)	(4)	(5)	(6)
		China's share <45%	No top 3 provinces	No Textile Clothing	No Great China	Col. 6 and no Guangdong
Same product/country foreign export	benchmark		<85%			
0/1 same product/country foreign export	0.015 ^a (0.003)	0.016 ^a (0.003)	0.015 ^a (0.003)	0.013 ^a (0.004)	0.015 ^a (0.003)	0.017 ^a (0.003)
Other countries-same product foreign export	0.079 ^a (0.028)	0.063 ^b (0.028)	0.072 ^a (0.028)	0.077 ^a (0.026)	0.080 ^a (0.030)	0.063 ^b (0.026)
Same country-other products foreign export	0.008 ^a (0.002)	0.007 ^a (0.002)	0.008 ^a (0.002)	0.005 ^a (0.002)	0.008 ^a (0.002)	0.006 ^a (0.002)
Other countries/products foreign export	0.084 (0.107)	0.104 (0.106)	0.093 (0.106)	0.074 (0.095)	0.092 (0.107)	0.059 (0.100)
Control for domestic presence	yes	yes	yes	yes	yes	yes
Control for GDPs	yes	yes	yes	yes	yes	yes
Control for Macro export	yes	yes	yes	yes	yes	yes
Control for Macro export lags	yes	yes	yes	yes	yes	yes
Observations	4161535	3129712	3930390	3268362	3396644	3780905
R-squared (%)	12.47	13.73	12.76	11.33	13.30	12.55
Fixed effects	by province-product(HS4)-country triad and by year					
Share of domestic ODT starts	0.217	0.214	0.217	0.215	0.215	0.217

Heteroskedasticity-robust standard errors are reported in parentheses. Standard errors are clustered at the province level. ^a, ^b and ^c indicate significance at the 1%, 5% and 10% confidence level.

Table 2: Nature of foreign export spillovers - durable starts

Explained variable	Durable domestic new export link in t+1					
	(1)	(2)	(3)	(4)	(5)	(6)
Foreign export spillovers Year t	All products-countries foreign export	-0.408 ^b (0.193)				
	Country all products foreign export		-0.004 (0.005)			
	Product all countries foreign export			-0.003 (0.003)		
	Same product/country foreign export				0.021 ^a (0.002)	0.023 ^a (0.002)
	Other products-same country foreign export				-0.002 (0.005)	0.002 (0.005)
	Other countries-same product foreign export				-0.003 (0.002)	0.005 ^b (0.002)
	Other countries/products foreign export				-0.377 ^b (0.184)	-0.468 (0.362)
Demand Year t	Ln country-product total imports	0.108 ^a (0.012)	0.109 ^a (0.013)	0.109 ^a (0.013)	0.108 ^a (0.013)	0.050 ^a (0.009)
	Ln country GDP per capita	0.342 ^a (0.062)	0.342 ^a (0.062)	0.340 ^a (0.062)	0.337 ^a (0.061)	0.195 ^a (0.063)
	Ln Province GDP per capita	-0.474 (0.594)	-0.819 (0.640)	-0.821 (0.639)	-0.820 (0.642)	-0.631 (0.573)
Supply Year t	Ln export province	1.105 ^a (0.308)	0.879 ^a (0.312)	0.882 ^a (0.311)	0.877 ^a (0.312)	0.693 ^a (0.205)
	Ln export province-product	0.259 ^a (0.012)	0.263 ^a (0.012)	0.265 ^a (0.013)	0.260 ^a (0.012)	0.240 ^a (0.010)
	Ln export province-country	0.197 ^a (0.027)	0.201 ^a (0.029)	0.198 ^a (0.027)	0.198 ^a (0.027)	0.181 ^a (0.027)
	Ln export China-product	0.675 ^a (0.020)	0.671 ^a (0.022)	0.672 ^a (0.022)	0.668 ^a (0.022)	0.516 ^a (0.023)
	Ln export China-country	0.331 ^a (0.036)	0.329 ^a (0.036)	0.327 ^a (0.037)	0.327 ^a (0.037)	0.244 ^a (0.030)
Macro lags Year $t - 1$	Lag Ln country-product total imports				0.340 ^a (0.015)	0.340 ^a (0.014)
	Lag Ln export province				0.489 ^b (0.226)	0.466 ^b (0.233)
	Lag Ln export province-product				0.050 ^a (0.011)	0.051 ^a (0.011)
	Lag Ln export province-country				0.047 ^b (0.019)	0.047 ^b (0.019)
	Lag Ln export China-product				0.163 ^a (0.022)	0.158 ^a (0.022)
	Lag Ln export China-country				0.105 ^a (0.022)	0.103 ^a (0.024)
Dom. presence Year t	Ln Other countries same product domestic export					0.141 ^a (0.013)
	Ln Other products same country domestic export					0.110 ^a (0.042)
	Ln Other countries/products domestic export					-0.422 (1.060)
Observations	2486517	2486517	2486517	2486517	2486517	2486517
R-squared (%)	33.78	33.72	33.72	33.74	34.31	34.43
Fixed effects	Province-product(HS4)-country triad & by year					
Share of durable domestic starts	0.205					

Heteroskedasticity-robust standard errors are reported in parentheses. Standard errors are clustered at the province level. ^a, ^b and ^c indicate significance at the 1%, 5% and 10% confidence level.

Table 3: Nature of foreign export spillovers DUMMY

Explained variable	Domestic new export link in t+1				
	(1)	(2)	(3)	(4)	(5)
Spillovers Year t	0/1 Same country foreign export	-0.040 (0.039)			
	0/1 Same product foreign export		-0.015 (0.016)		
	0/1 Same product/country foreign export			0.196 ^a (0.014)	0.191 ^a (0.014)
	0/1 Other products-same country foreign export				0.192 ^a (0.014)
	0/1 Same product-other countries foreign export				-0.044 (0.040)
				-0.020 (0.020)	-0.018 (0.020)
Control for domestic presence	yes	yes	yes	yes	yes
Control for imports and GDPs	yes	yes	yes	yes	yes
Control for Macro export	yes	yes	yes	yes	yes
Control for Macro export lags	yes	yes	yes	yes	yes
Fixed effects	by province-product(HS4)-country triad & by year				
Observations	4374850	4374850	4374850	4374850	4374850
R-squared (%)	12.19	12.19	12.22	12.56	12.56
Share of domestic starts	0.219				

Heteroskedasticity-robust standard errors are reported in parentheses. Standard errors are clustered at the province level. ^a, ^b and ^c indicate significance at the 1%, 5% and 10% confidence level.

Table 4: Nature of foreign export spillovers - durable starts DUMMY

Explained variable	Durable Domestic new export link in t+1				
	(1)	(2)	(3)	(4)	(5)
Spillovers Year t	0/1 Same country foreign export	-0.026 (0.058)			
	0/1 Same product foreign export		-0.020 (0.022)		
	0/1 Same product/country foreign export			0.205 ^a (0.019)	0.198 ^a (0.020)
	0/1 Other products-same country foreign export				0.198 ^a (0.020)
	0/1 Same product-other countries foreign export				-0.032 (0.060)
				-0.029 (0.022)	-0.027 (0.022)
Control for domestic presence	yes	yes	yes	yes	yes
Control for imports and GDPs	yes	yes	yes	yes	yes
Control for Macro export	yes	yes	yes	yes	yes
Control for Macro export lags	yes	yes	yes	yes	yes
Fixed effects	by province-product(HS4)-country triad & by year				
Observations	2486517	2486517	2486517	2486517	2486517
R-squared (%)	33.72	33.72	33.74	34.25	34.25
Share of durable domestic starts	0.205				

Heteroskedasticity-robust standard errors are reported in parentheses. Standard errors are clustered at the province level. ^a, ^b and ^c indicate significance at the 1%, 5% and 10% confidence level.

Table 5: Summary statistics on domestic starts and foreign presence nature

Year	Domestic start=1				Domestic start=0			
	Total	Same product Same country	Other product countries	Other products Same country	Total	Same product Same country	Other product countries	Other products Same country
1997	83818	5688	5047	71753	776830	17230	444238	581812
2006	159318	13001	118686	146838	395054	31580	250577	358320
Total	1268768	94690	885055	1123626	6060088	226741	3674106	4956347
Share (%)		7.5	69.8	88.6		3.7	60.6	81.8
				100				100