

## ITC MARKET ANALYSIS SERVICES UPDATE

ENHANCING THE TRANSPARENCY OF GLOBAL TRADE AND MARKET ACCESS

### ITC'S 50<sup>th</sup> ANNIVERSARY



*As we celebrate the 50th Anniversary of ITC we can be proud of the progress that we have made and the impact that we have had. As this photograph shows, we are indeed a "One-ITC" and it is our dedication that will allow ITC to continue to "Do More and Do Better" ITC Executive Director, Arancha González*

Take a look back at ITC's achievements over the last half a century through client testimonials, archive photos and case studies demonstrating the impact of the agency's projects as well as through memories evoked by retired staff. – Visit [www.intracen.org/the-50th-anniversary-of-itc/](http://www.intracen.org/the-50th-anniversary-of-itc/)

### TARGETING NON-TARIFF MEASURES IN DEVELOPING COUNTRIES

Addressing non-tariff measures (NTMs) in developing countries remains key to improving the export profiles of developing countries. Companies in developing countries continue to face difficulties in complying with SPS / TBT requirements. These issues are highlighted by ITC's NTMs programme which continues in 2014 with new survey launches, reports and follow up activities. The survey findings are aimed at promoting better understanding of NTM-related challenges in beneficiary countries and contributing to the development of solutions.

Building on the experience and knowledge of export and import businesses in dealing with non-tariff measures, these surveys are a viable and proven mechanism for deepening understanding on the perception and impact of NTMs, which by their nature are hard to quantify. They identify at product, sector and partner country-levels the predominant obstacles the business sector currently faces when complying with NTMs, as well as potential bottlenecks at the national or regional levels with regards to the capabilities and technical capacity to meet regulations and demonstrate compliance.

The NTM programme is mainly funded by UK's Department of International Development (DFID).

#### NEW PUBLICATIONS

Three new country reports as part of ITC's series on NTMs have been published during the second quarter of 2014. The key findings include:

##### KENYA

- Two-thirds of companies surveyed in Kenya are facing difficulties with trade-related regulations such as compliance with technical requirements,
- Many difficulties are due to red tape and delays in public agencies,
- Keys to improving Kenya's export performance: Streamlining government procedures, improving transport maintenance and IT infrastructure, and better dissemination of trade-related information,
- Countries of the East African Community need to make greater efforts to harmonize procedures and product standards.

##### SENEGAL

- 260+ companies surveyed in Senegal revealed that national administrative procedures to address foreign and national requirements represent a major non-tariff barrier,
- Lack of electricity, high transport costs and customs clearance are also important barriers,
- To help the private sector in Senegal to meet international requirements, Senegal needs to streamline national conformity assessment procedures and improve its business environment.

## CÔTE D'IVOIRE

- Côte d'Ivoire exporters face more obstacles in the regional market than in global markets,
- 2/3 of exporting companies encounter obstacles related to non-tariff measures,
- A main challenge is the delivery of certificates of origin to export to neighbouring countries,
- While several agreements are put into place to enhance trade integration and development, many barriers remain for their concrete application.



Download the full version of NTM publications on [www.intracen.org/ntm/publications/](http://www.intracen.org/ntm/publications/)

## SURVEYS

NTM surveys in *Thailand* and *Colombia* have been recently concluded with around 1,200 and 700 companies interviewed in the two countries respectively. Surveyed companies were asked about the regulatory obstacles to trade they face in their country, destination markets or any other transit countries. The results of the survey will be presented to representatives of the public and private sector of both countries in the coming months followed by a publication of the country report as a part of ITC's series on non-tariff measures.

The NTM survey in *Bangladesh* was launched in April 2014 in collaboration with the Ministry of Commerce of Bangladesh and Bangladesh Foreign Trade Institute (BFTI). The survey is expected to run until September 2014 with over 1,100 exporters and importers being interviewed on their experiences with NTMs.

In addition, preparation is ongoing for surveys in four new countries: *Philippines*, *Laos*, *Ecuador* and *Benin*, scheduled for launch in Q3 and Q4 2014.



## EVENTS

The NTM team presented a study "*Trade Facilitation in Arab States: Insights From the ITC Business Surveys On NTMs*" that served as input for the discussion at the high-level regional roundtable on NTMs, held in Tunis, Tunisia on 28-29 April 2014. The meeting brought together over 70 representatives from the Arab region's ministries of trade, standards bodies and customs agencies as well as international organisations and donors.

The event involved three thematic roundtables on quality and conformity requirements, trade rules and regional integration, and customs clearance and border controls. Each regional roundtable discussed key challenges and concrete actions to be undertaken at national and regional levels to eliminate the identified NTM-related obstacles with the objective to support the development of intra-regional trade within the Arab region.

The study is based on evidence from large-scale business surveys that ITC conducts as part of its NTM programme and will be made available to the public in Q3 2014.

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ITC organized the *NTM Stakeholders Meeting in Tanzania* in Dar-es-Salaam, Tanzania on 21 May 2014 in collaboration with the Tanzanian Ministry of Industry and Trade. Results of the NTM survey in Tanzania were presented to over 50 representatives from the Tanzanian public agencies, private sector, business associations and international organizations. The aim of the one-day workshop was to validate the results of the survey as well as to obtain inputs for policy recommendations and possible follow up actions to remedy the issues highlighted during the survey. The findings from this meeting will be incorporated into the final NTM country report – a part of ITC's series on non-tariff measures. The report is expected to be published in Q3 2014.

## TRADE OBSTACLE ALERT

ITC has developed a *Trade Obstacle Alert (TOA)* mechanism for Côte d'Ivoire as a part of the Trade Support and Regional Integration Programme for the Côte d'Ivoire (PACIR). PACIR is ITC's largest country-based programme with the objective of strengthening the Ivorian economy and facilitating the regional integration process of the Côte d'Ivoire as outlined in the Economic Partnership Agreement (EPA). The project is funded by the European Union (EU).

As part of the TOA project, ITC is building an on-line tool as platform for policy makers and trade operators to identify and address barriers to trade. The mechanism is monitored by a national committee which groups all agencies dealing with trade procedures and regulations. The tool also functions as a database of up-to-date information on trade obstacles.

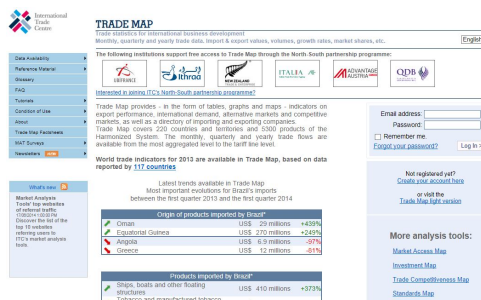


The TOA mechanism ([www.obstaclesaucommerce.org/cotedivoire/](http://www.obstaclesaucommerce.org/cotedivoire/)) was launched in May 2014, in collaboration with the Ministry of Commerce and the Chamber of Commerce and Industry. The national authorities and private sector representatives are currently being trained to use the portal. A number of obstacles have already been resolved thanks to this new tool.

## TRADE MAP: 2013 Trade indicators based on data reported by 117 countries are now available

On May 28<sup>th</sup>, 2014 Trade Map's famous trade indicators were updated. Between 2009 and 2013 the annual growth rate of world trade was 10%, which has been mainly linked to the recovery after the financial crisis in 2009. However, the small growth rate of 2% between 2012 and 2013 confirms a slowdown in world trade.

Discover the 2013 trade indicators and make sure your market studies and analysis are always up-to-date with [www.trademap.org](http://www.trademap.org)



## INTERESTING FACTS BASED ON THE LATEST TRADE INDICATORS:

- In 2013, the largest trade *deficit* was in the *United States* with US\$ 750 billion while *Germany* had the highest *trade surplus* of US\$ 264 billion
- One of the most dynamic countries between 2009 and 2013 was *Nicaragua*. Its exports have been multiplied by 4 between 2009 and 2013 to reach US\$ 4.8 billion and *article of apparels* represent more than one fourth of Nicaragua's exports
- Did you know? *China's exports to Nepal* multiplied by 5 between 2009 and 2013 to reach US\$ 2.2 billion and article of apparels represent 62% of these exports. However, according to trade data reported by Nepal in 2011, the import value of apparels was far below the export value declared by China. This could have been due to the fact that the *final destination* for these goods was a different country other than Nepal.





- In the same time *China's* imports from *Slovakia* have multiplied by 4 to reach US\$ 3.4 billion in 2013 and *automobiles* represent 86% of these imports.
- Indonesia* was the world's third biggest importer of *HS 040210-Milk powder not exceeding 1.5% fat*. Between 2009 and 2013, the demand for milk powder grew by 21% in value and by 9% in quantity. Both figures exceeded those of the world's average. Indonesia currently bought this product mainly from USA, New Zealand and Australia.
- Since 2008, *Ecuador* has reigned as the world's number 1 exporter of *HS 0803-Bananas including plantains, fresh or dried*. In 2011, Russia overtook United States as the biggest importer for Ecuador's bananas. Ecuador exported nearly *US\$550 million worth of bananas to Russia* and had 95.3% market share.

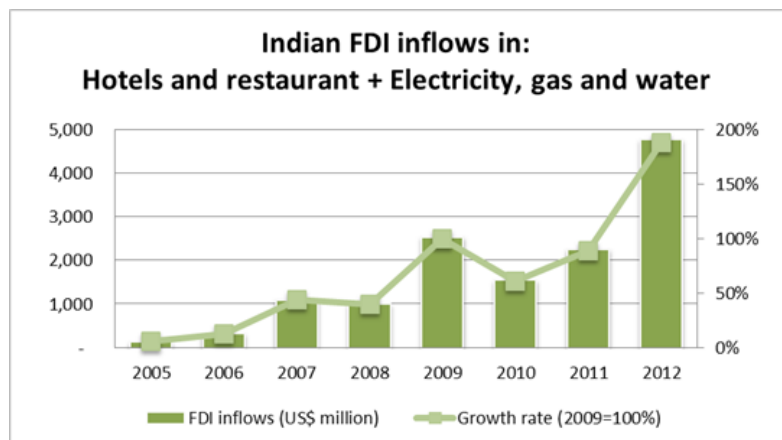


## MARKET ACCESS MAP: 2013 World Tariff Profiles and Historical data on Market Access Map

The *2013 World Tariff Profiles*, jointly developed with WTO and UNCTAD, are now available under the Tariff and trade indicators sub-module of Market Access Map ([www.macmap.org](http://www.macmap.org)). The module is designed for companies looking for an at-a-glance overview of trade and market access conditions and contains one page with the key trade related information per country, presented in Excel format and easily accessible. Specifically, exporters can identify top destination markets and tariffs faced in these markets, while importers may find import tariffs by product group and corresponding shares of duty free access.

	A	B	C	D	E	F	G	H	I	J	K	
1	Bolivia, Plurinational State of											
2	Part A.1 Tariffs and imports: Summary and duty ranges											
3	Summary			Total	Ag	Non-Ag	WTO member since				1995	
4	Simple average final bound			40.0	40.0	40.0	Binding coverage:			Total	100	
5	Simple average MFN applied			2012	11.2	12.4	11.0	Non-Ag			100	
6	Trade weighted average			2011	8.7	11.2	8.5	Ag: Tariff quotas (in %)			0	
7	Imports in billion US\$			2011	7.7	0.7	7.0	Ag: Special safeguards (in %)			0	
8												
9	Frequency distribution			Duty-free	0 <= 5	5 <= 10	10 <= 15	15 <= 25	25 <= 50	50 <= 100	> 100	NAV
Tariff lines and import values (in %)								in %				
11	Agricultural products											
12	Final bound		0	0	0	0	0	100.0	0	0	0	
13	MFN applied	2012	0.3	9.9	50.8	19.5	19.5	0	0	0	0	
14	Imports	2011	0.0	4.3	77.4	7.8	10.5	0	0	0	0	
15	Non-agricultural products											
16	Final bound		0	0	0	0	0	100.0	0	0	0	
17	MFN applied	2012	7.4	33.5	29.6	10.0	13.2	6.3	0	0	0	
18	Imports	2011	13.4	17.6	61.9	3.7	2.0	1.4	0	0	0	
19												
20	Part A.2 Tariffs and imports by product groups											
21	Product groups			Final bound duties				MFN applied duties			Imports	
AVG				Duty-free	Max	Binding	AVG	Duty-free	Max	Share	Duty-free	
in %				in %			in %			in %	in %	
24	Animal products			39.8	0	40	100	12.6	1.1	20	0.1	0.8
25	Dairy products			40.0	0	40	100	12.0	0	20	0.2	0
26	Fruit, vegetables, plants			40.0	0	40	100	14.1	0	20	0.5	0

## INVESTMENT MAP: Did you know?



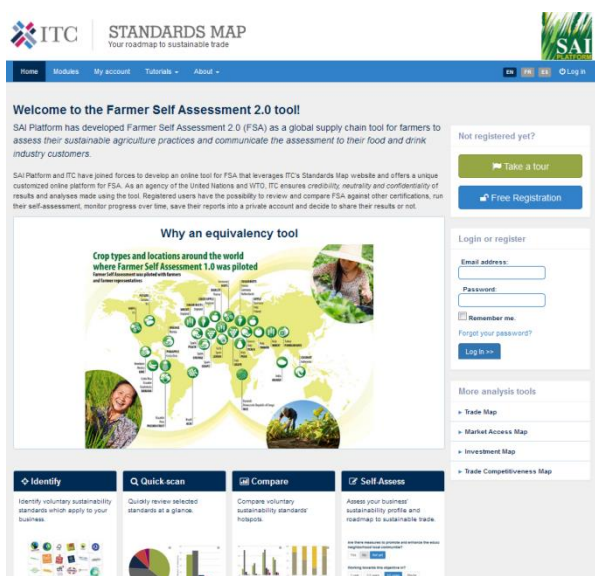
Services sectors in India attracted the greatest stake of FDI in 2012. In particular, FDI inflows in the “Electricity, gas and water” and the “Hotels and restaurant” sectors increased sharply between 2005 and 2012. Services sectors accounted for 64% of total FDI inflows in India in 2012, amounting to a total of US\$ 4.8 billion.

Investment Map is the only online resource for FDI information detailed by country and sector. Investment Map contains detailed 2012 data broken down by partner country and/or by destination sector for around [80 countries](#). This statistical data is coupled with sectoral information on more than 165,000 foreign affiliates established in developing countries and emerging markets, as well as with trade and market access statistics.

Visit [www.investmentmap.org](http://www.investmentmap.org) for more.

## STANDARDS MAP

We are pleased to inform you that [additional standards](#) are now available for review in Standards Map, covering floriculture (Kenya Flower Council Standards), tourism (Green Line, Responsible Tourism Tanzania), and energy (Equitable Origin) and UNILEVER Sustainable Agriculture Code.



Discover the [Farmer Self-Assessment online tool](#) launched on April 3rd, developed in collaboration with the Sustainable Agriculture Initiative (SAI) Platform, which leverages Standards Map and offers a customized tool and self-assessment module for farmers and suppliers of SAI Platform members, among which Nestlé, Unilever, Danone, The Coca-Cola Company, PepsiCo, Mondelez and MARS. See more at [www.standardsmap.org/fsa](http://www.standardsmap.org/fsa)

[Standards Map](#) [www.standardsmap.org](http://www.standardsmap.org) – an online tool that brings transparency and offers comparability and self-assessment on over 135 voluntary standards, codes of conduct and audit protocols that producers and exporters may face when accessing international markets.

## BUILDING THE CAPACITY OF ENTERPRISES AND TRADE SUPPORT INSTITUTIONS IN TRADE INTELLIGENCE AND MARKET ANALYSIS

During the second quarter of 2014, ITC delivered *38 capacity building workshops*, webinars and other training programmes in market analysis reaching over *1,200 beneficiaries in 60 developing countries*. Groups benefiting from training included: Small & Medium sized Enterprises (SMEs); Trade Support Institutions (TSIs); chambers of commerce; national ministries; educational institutions and the media. In addition to the first quarter activities, *a total of 1,581 beneficiaries have been reached through 58 training sessions in 2014* so far.

Some of the training highlights include:

### ■ IVORY COAST (PACIR PROGRAMME), APRIL & MAY 2014:

ITC organised a seminar on "Identify and Analyse Export Markets" in Abidjan on May 27<sup>th</sup> to 28<sup>th</sup> and trained 8 TSIs as well as 15 Ivorian companies representing a variety of sectors including pharmaceuticals, agro processing and trade logistics services. 8 national ITC-certified trainers facilitated this seminar under the supervision and guidance of 2 ITC experts. An additional workshop will be held in July, facilitated by these Ivorian trainers and targeting SME exporters.



On May 28<sup>th</sup> a web-based trade obstacle alert mechanism was officially launched in Abidjan to create a communication bridge between Ivorian companies and public institutions and to facilitate the identification and removal of non-tariff barriers to international trade. The mechanism enables companies to report the trade obstacles that they face and have their enquiries investigated and resolved. The Ivorian Chamber of Commerce is the national focal point responsible for managing and facilitating the resolution of the trade obstacles reported on the platform.

### ■ BOTSWANA TRAINING, APRIL 2014:

More than 30 participants were trained on ITC Market Access Map and Trade Map for researching export markets. The workshop was funded by the European Commission (EC) and implemented by ITC in collaboration with Botswana Investment and Trade Centre (BITC). Thanks to the training BITC is using the tools to produce a value-chain analysis and export strategy for its beef sector.

### ■ TRAINING ON ITC TOOLS FOR JOURNALISTS, MAY 2014:

6 Journalists representing media channels including Reuters, Expert Kazakhstan Magazine, received training on ITC's tools, with a view to helping them report about international trade trends, bilateral trade relationships between countries and specific market characteristics. In 2013 trade statistics from ITC were referenced by the media more than 2,800 times.

### ■ MALAWI, MAY 2014:

From May 6<sup>th</sup> to 9<sup>th</sup>, 2014, ITC's held a 4-day workshop in Malawi to support the production and analysis of trade statistics using various data management tools. An important objective of the Malawi project, sponsored by the European Development Fund, is to enhance the capacity of Malawi institutions to improve the overall quality of their trade statistics as well as Malawi's ability to calculate various trade indices. This was the first in a series of 4 workshops in Malawi to enhance data management skills and the processing of Malawi's trade statistics.



### ■ EURO-MED TRADE AND INVESTMENT FACILITATION MECHANISM WORKSHOP, MAY 2014:

ITC is the technical implementing agency of a European Commission (EC) funded project to facilitate closer economic ties and improve trade and investment transparency in the Euro Mediterranean region. In May ITC delivered a workshop for technical focal points from 9 southern Mediterranean countries – Algeria, Egypt, Jordan, Israel, Lebanon, Morocco, Palestine, Tunisia and Turkey.



The workshop was hosted by the Secretariat for the Union for the Mediterranean (UfM) in Barcelona, Spain and focused on the design of an online tool to provide economic operators with free trade and market access data about the region and the formation of a Network of institutions across the region responsible for responding to enquiries from companies and other economic operators about doing business in their markets. These technical focal points will also work with ITC and relevant institutions in their country to identify, collect and process trade and market information for the expected launch of the portal in mid-2015.

#### ■ SOUTH AFRICA EXPORT MARKET RESEARCH TRAINING: “PREPARING A MARKET PROFILE REPORT”, JUNE 2014:

In partnership with the South African Department Agriculture Forestry & Fisheries, ITC ran a 5-week Export Management & Market Analysis E-Learning course between May 5th and June 8th. Via lectures, videos, quizzes and forum discussions, this interactive online training course covered subjects such as export market research, trade performance analysis, and market access conditions.



The course, which ran on the new ITC corporate SME Trade Academy platform, attracted over 50 participants from 23 different institutions. From this pool, 29 participants have been selected to participate in further face-to-face training workshops in Johannesburg.

*“This has been a mind-stimulating module and I hope to learn more daily. Indeed a great intervention by the ITC for developing countries!” - Participant*

#### REPLICATED TRAININGS FOR SUSTAINABLE IMPACTS:

We would like to extend our hearty congratulations to Mr. Surendra Gongal (sitting second from the left of the picture) from Nepal's Trade and Export Promotion Centre (TEPC) on his success in delivering a 3-day



training workshop on market analysis in Thimpu, Bhutan in May 2014 with the support from the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) which resulted in around 20 private sector operators being trained in market research.

Mr. Gongal participated in a USAID and EC funded market analysis and research capacity building programme in 2013. He is also planning to organise at least 3 more training workshops on ITC Market Analysis Tools in different cities of Nepal in the second half of 2014.

## KEEP IN TOUCH WITH ITC MARKET ANALYSIS TOOLS

Get regular updates about the latest monthly data or simply contact us if you have any problems or questions through one of your current social networks such as Facebook, Twitter or YouTube. We would be happy to learn more about how you are using ITC Tools and their impact on your work.



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## HELP US PROMOTE ITC MARKET ANALYSIS TOOLS

At the end of each month, a list of the top 10 referral websites to ITC Market Analysis Tools is featured on the Trade Map home page. By actively recommending ITC Market Analysis Tools to your friends and colleagues and a link to your organisation's website might be published on our portal. This is an effective way to create visibility for your organisation and it is completely free of charge.

For your information, the top 5 websites of referral traffic to ITC Market Analysis Tools for May 2014 are shown in the box below.

### ITC Market Analysis tools

#### Top 5 websites of referral traffic for May 2014

1. Facebook <a href="http://www.facebook.com">www.facebook.com</a>	
2. Wikipedia <a href="http://www.wikipedia.org">www.wikipedia.org</a>	
3. Prom Peru <a href="http://www.siicex.gob.pe">www.siicex.gob.pe</a>	
3. Promexico <a href="http://www.promexico.gob.mx">www.promexico.gob.mx</a>	
4. VK <a href="http://www.vk.com">www.vk.com</a>	

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Federal Ministry for Economic Cooperation and Development (BMZ)		State Secretariat for Economic Affairs SECO		UTZ Certified	
HIVOS International		The Transparency in Trade Initiative – a cooperation of ITC, UNCTAD, the World Bank, the African Development Bank and donors to this initiative		4C Association	