

ITC MARKET ANALYSIS SERVICES UPDATE

ENHANCING THE TRANSPARENCY OF GLOBAL TRADE AND MARKET ACCESS

NTM BUSINESS SURVEYS: GIVING SMALL & MEDIUM SIZED ENTERPRISES A VOICE



THE ITC NTM PROGRAMME AT THE FIFTH GLOBAL REVIEW OF AID FOR TRADE

ITC was an active participant in the recently concluded *Fifth Global Review of Aid for Trad*e, held at WTO's Geneva headquarters from 30 June to 2 July 2015

The main focus for ITC at the event was on how to reduce the impact of NTMs, such as standards and technical regulations, on small and medium-sized enterprises. ITC organized a session "Getting Past Non-Tariff Measures: Reducing Costs for Business" together with the Government of Côte d'Ivoire and the United Kingdom Department for International Development (DfID). The session focused on how the rising number of NTMs, while reflecting higher consumer expectations for product quality and safety, can also impose significant financial and time costs on SMEs.

Speaking at the event, Arancha Gonzalez, Executive Director of ITC, highlighted the importance of identifying those NTMs perceived as burdensome by the private sector and the role of NTM Surveys in contributing to private-public

dialogue on NTMs, increasing transparency and reducing information asymmetries.

Also at the event, exporters from India and Thailand shared their own experiences with product standards and certification requirements, in both their home and export markets. They expressed how a lack of proper implementation of standards in India and high costs of SPS certification in Thailand have hampered their business activities. They called for a closer public-private cooperation to better respond to SMEs' needs.

Senior officials from Cote d'Ivoire and Mauritius described how ITC's business surveys on trade obstacles linked to NTMs helped them design policies to reduce trade-related costs and delays for SMEs. Representatives from the European Union and the UK, meanwhile, highlighted the importance of reducing SME trade costs for job creation and poverty reduction.







During the session, ITC also launched a new publication "The Invisible Barriers to Trade" which documents the results of the ITC's business survey on NTMs in 23

In another session, jointly organized by ITC, UNCTAD, World Bank and WTO, Marion Jansen – Chief Economist at ITC, highlighted that the small and medium sized enterprises in developing countries contribute to 80% of employment and that the enterprises that export or import are the most productive ones. She highlighted ITC's effort in helping SMEs by developing tools such as Standards Map (www.standardsmap.org) which help exporters obtainmore information on various types of Private Standards and their compliances, as well as the Trade Obstacle Alert which enables exporters and importers to report trade related problems directly to the concerned authorities.

ITC also participated in an event organised by the European Union on 1st July entitled "The Future of the EU Aid for Trade Strategy – A Stakeholder consultation" where among other things ITC highlighted how its market analysis tools have helped with the EC's support to bring down the cost for

countries. A new ITC website (www.ntmsurvey.org) dedicated to NTM survey results was also launched at the event.



SMEs of searching for information about trade opportunities and market compliance issues, including in sustainably certified products through its free tools Trade Map, Market Access Map and Standards Map.

ABOUT THE GLOBAL REVIEW OF AID FOR TRADE:

The Global Review of Aid for Trade is a biennial event on development assistance aimed at helping countries to increase their participation in global trade. The event brought together participants from around the world — including trade and development ministers, other government officials, heads of multilateral and development agencies, representatives of the private sector and civil society — to discuss how to reduce high trade costs, which act as a brake on the integration of many developing countries and least-developed countries (LDCs) into international trade. The theme for this year's event was 'Reducing Trade Costs for Inclusive, Sustainable Growth'.

OTHER EVENTS

World Trade Data Day

On July 3, ITC participated in the "Trade Data Day at WTO", a joint initiative from ITC, UNCTAD, the World Bank and WTO. The main purpose of the event was to review the main advances obtained in trade and market access statistics as well as looking at the way ahead. Two substantive panels focused on key aspects in: (1) monitoring and analysis of non-tariff trade policy measures, and (2) trade and market access information systems on commercial services.



During a panel discussion, Mondher Mimouni, Chief of ITC's Market Analysis and Research section (MAR), presented the progress made in the collection of NTM data including regulatory information and NTM Business Surveys as well as the challenges ahead.

At the event, UNCTAD, ITC and WTO presented their current databases and online applications on NTMs. ITC highlighted its efforts in NTM data collection and dissemination through Market Access Map (www.macmap.org) as well as the NTM Business Surveys



whose results are available in a new online application at www.ntmsurvey.org.

Participation at the APEC SME Global Supply Chain Event

ITC was invited to participate in the APEC SME Global Supply Chain event in June 2015 in Atlanta, United States. ITC presented the results of the NTM surveys in the Asia Pacific Region focusing on the agriculture and food processing sector. During the panel discussion, participants shared insights on how APEC can provide short to long term policy and program directions for addressing NTMs and for helping SMEs understand and navigate the rules in doing business across the borders.

ITC also moderated a session which presented the concrete experiences of APEC Economies dealing with NTMs. The panel consisted of representatives from different APEC economies, including representatives of the United States, Philippines, and Indonesia among others.

ACP Briefing on NTBs 19 May 2015, WTO Geneva

ITC presented at a briefing session for the ACP Group on 19 May on non-tariff barriers (NTBs) and presented some keytrends from ITC NTM surveys and reports undertakenin ACP States so far. The session focused on the impact of burdensome NTMS on exports (), with a particular focus on measures other than conformity assessment and technical regulations.

NEW NTM SURVEY LAUNCHES

ITC launches three new business surveys on non-tarif measures during the period April-June 2015. The results of these survey will help improve the understanding of the current trade and business environment in the country and will allow the private and public sectors to identify potential actions to support and improve the competitiveness of domestic firms.

JORDAN

ITC is currently conducting a large-scale survey of business enterprises in Jordan. The survey aims to understand trade barriers faced by the Jordanian private sector in their business operations in order to reduce bottlenecks to trade. The survey is being conducted in collaboration with the Ministry of Industry and Trade and Supplies of Jordan.

On 27 April 2015, ITC held the first stakeholder meeting on NTMs in Amman, Jordan, to officially launch the survey in the country. During this launch, which was attended by government officials from various ministries, trade support institutions and various other public and private sector stakeholders, ITC presented its programme on NTMs and introduced the objectives and the methodology of this survey, as well as the results obtained in other countries



MALI

ITC's NTM survey in Mali was officially launched 7th May, 2015 in collaboration with the Malian Ministry of Commerce and Industry. Mali is the 6th country in the West African region of ECOWAS to be surveyed by ITC.

During a meeting with ITC, Mr Abdel Karim Konaté, Minister of Commerce emphasized that "Mali has huge trade potential but it has been under-exploited and that Mali needs to improve its regulations to streamline the export process". The Minister also expressed the government's support to ITC during the survey implementation and called for an active participation of the Malian private sector in the survey.

The official launch of the NTM survey brought together around 50 representatives from the private and public sectors. Representatives of the cotton, leather and handicrafts sectors. as well as the customs department, stressed the importance of identifying major regulatory and procedural obstacles to trade faced by the Malian exporters and importers. Representatives of women associations also expressed their keen interest in the NTM survey and in addressing difficulties faced by women entrepreneurs.



EUROPEAN UNION

In May ITC launched a series of surveys on NTMs experienced by exporters and importers in European Union (EU) countries. The project, which will run until early 2016, is being implemented in collaboration with the European Commission, with a view to of providing a deeper understanding of firms' perception of NTMs. The resulting database will contain detailed information on NTM-related trade impediments to exports and imports with a particular focus on imports from developing countries and exports to

EU's major trading partners.

The survey will scrutinize a representative sample of EU exporters at the sector level (trade in goods, excluding arms and minerals). Overall, 7,000 companies will be interviewed across the 28 EU Member States. The survey is being implemented in close collaboration with government officials, business associations, chambers of commerce and other stakeholders and is being adapted to country specificities. The results of the survey will be available in early 2016.



Timeline of ITC NTM Survey implementation in the European Union

UPCOMING SURVEY LAUNCHES

In the remainder of 2015, 5 new national surveys in developing countries on NTMs are planned for Uganda, Kyrgyzstan, Ethiopia, Dominican Republic and Ecuador.

NEW ONLINE TOOL ON NON-TARIFF MEASURES

ITC is proud to unveil a new addition to its *Market Analysis Tools* – *the NTM Business Survey website* (www.ntmsurvey.org) – an online interactive platform to analyse the results of the ITC NTM Surveys.

The tool enables its users to explore and compare results based on over 14,000 interviews with companies in 25 countries. Data for new countries will be incorporated as they become available.

The platform provides detailed NTM data for companies of various sectors, sizes and locations. Users are able to analyse this data to identify major regulatory and procedural obstacles to trade faced by different types of companies, compare the situation across countries and understand why specific types of NTMs pose a hindrance to them.

The platform also provides access to various publications on NTMs, including the country reports that form part of the ITC Series on Non-Tariff Measures. Furthermore, introductory online courses on NTMs, the NTM survey methodology, survey results, and the NTM classification system are also available.



NEW NTM RELATED PUBLICATIONS

Two new reports have been added to the ITC publication series on NTMs. All reports can be accessed free of charge here: www.ntmsurvey.org/publication



NOW BUSINESSES EXCEPTED
NOW TARRET MEASURES



The Invisible Barriers to Trade: How Businesses Experience Non-Tariff Measures

A new study by ITC on how businesses experience non-tariff measures in 23 developing countries finds small firms in the world's poorest countries to be hit hardest by non-tariff measures. The impact of NTMs on companies and countries is unevenly distributed with small firms highly affected. Developing countries find their agricultural exports to advanced economies are seriously affected by NTMs; but they also find their exports of manufactured products to their own regional developing markets challenged by NTMs. These invisible barriers to trade are mostly a combination of conformity and pre-shipment requirements requested abroad, and weak inspection or certification procedures at home. Over 11,500 exporters and importers participated in the surveys; details on the methodology and additional survey results are included in the report.



*

Guinea: Company Perspectives

A new country report on Guinea reveals that Guinea is one of the most affected countries by burdensome non-tariff measures. The study, based on a survey of Guinean enterprises, finds that 95% of the companies interviewed faceobstacles related to NTMs when exporting or importing goods. Companies suffer from stringent and complexEuropean technical and compliance requirements, as well as from a lack of efficiency and transparency in inspection and taxation procedures at the national and regional levels. The survey shows that a large part of trade barriers can be addressed through the simplification and increased transparency of national administrative procedures.

UPCOMING PUBLICATIONS

A new publication "Thailand: Company Perspectives" will be published in the coming months. The country report, based on interviews with over 1,100 companies in Thailand. investigates the types of regulatory and procedural obstacles to trade faced by the Thai business community.

TRADE OBSTACLES ALERT MECHANISM

The Trade obstacles alert (TOA) is currently being implemented in Côte d'Ivoire and Mauritius. The TOA allows trade operators to alert public authorities, each time they face anobstaclewhen exporting or importing their goods. Responsible agencies can then take the necessary actions to remove the identified obstacle.

In Côte d'Ivoire, the TOA platform is being promoted by the Chamber of Commerce and Industry of Côte d'Ivoire which organised different workshops in the country. More than 100 companies participated in these workshops which aim at presenting the TOA platform and familiarising the private sector with the tool and its functionalities. The platform counts more than 300 registered users, of which more than 200 are companies.

In Mauritius the TOA project is being piloted by the Mauritius Chamber of Commerce and Industry which has been trained by the ITC. The pilot phase aims at testing the system with a sample of companies. The platform will be launched in early September.











TRADE MAP

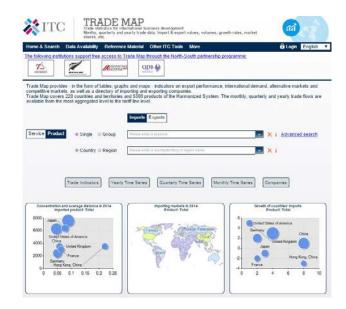
NEW HOMEPAGE

Trade Map's homepage has been revamped recently. Now you will find three small graphs at the bottom of page that simultaneously reflect the query you feed into the dropdown menus above. Or

In Trade Map's revamped homepage, you can now find the new feature of three small graphs which simultaneously reflect whichever query you select from the drop down menu (see screenshot above).

The different types of graphs or maps available on the Trade Map homepage can easily be embedded on any web site. This new graphical approach also makes it easier for other websites to integrate the latest trade statistics in a more attractive way.

If you are interested in embedding the graphs from Trade Map on your website, please contact us:marketanalysis@intracen.org



2014 TRADE INDICATORS NOW AVAILABLE BASED ON DATA FROM 115 COUNTRIES

Interesting facts based on the latest trade indicators

- In 2014, the largest trade deficit was in the United States with US\$ 785 billion while China overtook Germany as the country with the highest trade surplus of US\$ 380 billion
- One of the most dynamic countries between 2010 and 2014 was *Mozambique*. Its exports have more than doubled over the last 5 years to reach US\$ 8.7 billion. *Cereal* is one of its biggest sectors

Did you know? China's imports of HS-12 oil seed, oleagic fruits, grain, seed, fruit, etc, from Ethiopia have almost doubled over the last 5 years to reach the milestone US\$1 billion. The oil seed sector is the second largestsector of Ethiopian exports after coffee

More interesting trade statistics can be found on www.trademap.org – Access is always free for all users.

MAKING TRADE WORK FOR DEVELOPMENT

In collaboration with the **Gesellschaft für Internationale Zusammenarbeit (GIZ)**, the Market Analysis and Research Section (MAR) held a workshop on ITC's Trade Map and Market Access Map as a kick-off for GIZ's three day workshop in Hamburg, Germany.

The workshop equipped the 23 participants working on GIZ projects around the world with the necessary knowledge on how to analyse trade flows and regional markets with respect to their potential as well as access requirements.





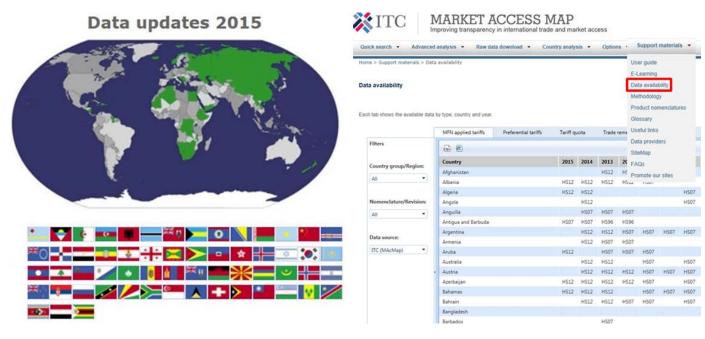
MARKET ACCESS MAP

Market Access Map (www.macmap.org), funded with the support of the European Commission and donors to the ITC Trust Fund, contains information on tariffs and other market access requirements for more than 190 countries. To see

an overview of the data available on our tool, check the page Data availability at $\frac{www.macmap.org/SupportMaterials/DataAvailabilityMfn.asp}{\underline{x}.}$

2015 CUSTOMS TARIFF UPDATES

2015 tariffs are now available for 62 countries and territories and 20 more countries will be added by the end of July!



2014 NTM OFFICIAL DATA UPDATES

Are you looking for data on Non-Tariff Measures? Visit our module *Find non-tariff measures*! We have updated 7 new countries with fresh data for 2014: *Tunisia, Lebanon, Algeria, Jordan, Palestine, Egypt and Israel*.





TRADE AND PRIVATE SECTOR DEVELOPMENT PROGRAMME WORKSHOP IN ZIMBABWE

On June 1-3, ITC provided training for **Zimbabwe's Ministry of Industry and Commerce (MolC)** in Trade, Market Access and Export Potential Analysis. The workshop was funded under the **EU Trade and Private Sector Development Programme**.

Officers from Ministry of Industry and Commerce (MoIC), Ministry of Finance and Economic Development, the Competition Tariff Division and the Zimbabwe Revenue Authority became familiarized with ITC's market analysis tools and other methods to analyse national trade performance, market access and export potential.



EU FUNDED EXPORT MARKET ACCESS TRAINING IN ZIMBABWE & LESOTHO

From 4-5 June, ITC's market analysts provided **ZimTrade** professionals with training on how to use ITC Tools to better advise clients— local exporters. In group exercises, participants identified attractive target markets for different Zimbabwean export products by comparing demand, competition, prices, tariffs and available voluntary standards in a wide range of existing and new markets. After the training, participants of both workshops testified that the training will help them better analyse and research markets and that they feel more equippedto take better trade-related decisions in the future.

Another workshop on the market analysis tools was also delivered to the Kingdom of Lesotho (June 4-5). The workshop, organized by the *Ministry of Trade and Industry* and the *Lesotho Chamber of Commerce and Industry (LCCI).* was attended by 17 participants, of which 65% women, from both the public and private sectors. The



vast majority of the participants reported that the workshop significantly enhanced their capacity to analyse markets and make better trade related decisions. Best mention: "The workshop was an eye opener in terms of international trade issues and access to international markets. Highly inspirational".

THE THIRD TECHNICAL MEETING ON EUROMED TRADE AND INVESTMENT FACILITATION MECHANISM (TIFM)

ITC. with of the European the support Commission, conducted a workshop from June 2-4 in Brussels, dedicated to the EuroMed Trade and Investment Facilitation Mechanism (EuroMed TIFM). 27 officials from Customs Administrations, Ministries of Trade and regional organizations attended the workshop from 9 countries including Algeria, Egypt, Israel, Jordan Lebanon, Morocco, Palestine, Tunisia and Turkey. Representatives from the EC's Trade and Development Cooperation units also participated in the meeting as did the EU's Export Helpdesk.

The EuroMed Trade and Investment Facilitation Mechanism (EuroMed TIFM) is a 3-year project to improve trade and investment within the Euro-Mediterranean region by providing an online Trade Helpdesk, similar to the EU Export Helpdesk, containing information about trade trends and opportunities, customs procedures and import duties, taxes as well as general and product-specific market requirements including product health and safety regulations. In addition to obtaining free market information, users of the portal will benefit from a trade enquiry helpdesk service managed by a network of trade support institutions in the 9 countries.

The meeting in Brussels of EuroMed countries focused on reviewing the trade and market access data that has been collected and processed, examining the portal under development and discussing future training, marketing and awareness raising activities to ensure traders and investors make use of the service. The network also discussed in depth, issues relating to the workflows and practical implementation of the trade enquiry service. Special attention was given to the role of technical focal points (TFP) in the functioning of the Enquiry system.



The EuroMed Trade Helpdesk will be launched in the last quarter of 2015.



STANDARDS MAP

INVITATION - JOIN US AT THE SECOND EDITION OF THE TRADE FOR SUSTAINABLE DEVELOPMENT (T4SD) FORUM

The event will take place in Geneva, Switzerland from 1-2 October 2015 under the theme "Connecting Smallholders to Sustainable Supply Chains". ITC's Trade for Sustainable Development (T4SD) Forum is a unique global

event dedicated to exploring the complex landscape of sustainability standards, methodologies and tools that facilitate market access and promote efficiency in supply chains.





Sustainability

oupport and promote sustainable trade practices, with regards to social, environmental, economic and management, quality and ethics issues at stake in the production, processing and trading of goods and services.



Transparency

Contribute to efficiency in global supply chains by clear demonstration of openness to sharing good practices, to foster transparency, trust and inclusiveness at all levels of global supply chains.



Harmonization

Build on existing resources and methodologies with a collaborative approach avoiding duplication that may provoke proliferation of standards, multiplication of public or presegment methodologies



Sustainable Development Goals

Act in alignment to the United Nations Post-2015 Development Agenda, which builds upon the Millennium Development Goals, with a view to developing a set of plobal sustainable development goals

Taking the perspective of one year after launching the Trade for Sustainable Development principles (Sustainability, Transparency, Harmonization, UN SDGs), ITC will bring back to the table over 200 representatives from multinational corporations, governments, international organizations and NGOs of the sustainable trade movement and discuss progress made, trends and new challenges ahead.

The Opening Session of this event will be held as part of the WTO Public Forum on 1 October, focusing on sustainability standards that protect the workers, the environment, and consumers.

This will be followed by a full day event on 2 October specializing on the perspectives of suppliers and buyers in how standards should be implemented, the harmonization that benefits them and ITC's core principles for sustainability standards.

Sign-up today as the number of seats is limited! www.intracen.org/Trade-for-Sustainable-Development-T4SD-Forum/

THE GFSI-GLOBAL MARKETS PROGRAMME ONLINE TOOL

The *Global Food Safety Initiative (GFSI)* and the International Trade Centre (ITC) have launched a free public customized joint online application of the Global Markets Programme (www.standardsmap.org/myqfsi). It is designed to bolster the competitiveness of small- and medium-sized (SME) agribusinesses, enabling them to better access global markets and contribute to food safety.

The programme sets out how smaller food companies can meet the challenge of food safety, while simultaneously reducing hazards in global food supply chains and working towards market access through certification to one of the 10 GFSI-recognised schemes. It provides an unaccredited entry point for SMEs with its step-by-step programme designed to build capacity within production and manufacturing operations, and implement a course of continuous improvement. GFSI and ITC Standards Map are a natural fit and working towards similar goals.

This free public tool serves as a first entry point for food manufacturers to learn and adhere to best food safety practices, generate diagnostic profiles directly online and be able to share those with business partners and auditing organizations.



- It provides a real time snapshot of their current arrangements against the requirements of the Global Markets Programme.
- Smaller business owners can also look at other standards for sustainability and food safety within the ITC Standards Map; which provides comprehensive and comparative information on over 180 sustainability standards and codes of conduct. The goal is to strengthen the capacity of producers, exporters, policymakers and buyers to participate in more sustainable production and trade.
- The new GFSI web portal embedded within the ITC Standards Map provides a link to the GFSI website, which provides free access documents including the Checklist, the Protocol and the
- Training and Competency Framework.



This new tool will help private companies to collaborate on food safety with the UN, civil society and other stakeholders. It complements existing initiatives that advance food safety in food and agriculture sectors.

CONTACT

International Trade Centre

Palais de Nations 1211 Geneva 10, Switzerland Telephone: +41 22 730 0111

Market Analysis and Research Team

Telephone: +41 22 730 0234

Email: marketanalysis@intracen.org

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The Transparency in Trade Initiative – a cooperation of ITC, UNCTAD, the World Bank, the African Development Bank and donors to this initiative



4C Association

