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## ITC MARKET ANALYSIS SERVICES UPDATE

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ENHANCING THE TRANSPARENCY OF GLOBAL TRADE AND MARKET ACCESS

### ITC's PROGRAMME ON NON-TARIFF BARRIERS

BRINGING TRANSPARENCY TO TRADE AND GIVING SMEs A VOICE



The ITC's programme on non-tariff measures (NTMs) exists since 2010 and after two programme cycles of three years, it is a good moment to take stock and to thank our clients, partners, users of the NTM data users, collaborators and donors as well as all exporters and importers who have shared their experiences with us over the years.

With your support we have contributed to increasing transparency and helped countries better understand the non-tariff obstacles to trade faced by their business sectors.

We remain engaged to ensure that the concerns of small and medium-sized enterprises (SMEs) about regulatory and procedural trade obstacles are brought to the attention of policymakers and other stakeholders at the national, regional and multilateral level, enabling them to take concrete actions to address these.

The NTM programme comprises three main components:

#### *Regulatory Mapping*

This component consists of collection, review and classification of national trade-related regulations. ITC has made NTM data for over 90 countries publicly available through ITC's Market Access Map.

#### *NTM Business Surveys*

Large-scale surveys of businesses on their experiences with NTMs when exporting or importing. The survey identifies at the product and partner country level the prominent obstacles companies face with NTMs.

#### *Solution Packages*

Design and implementation of tailored solution packages to address regulatory and procedural trade obstacles reflecting SME priorities and high-impact areas.

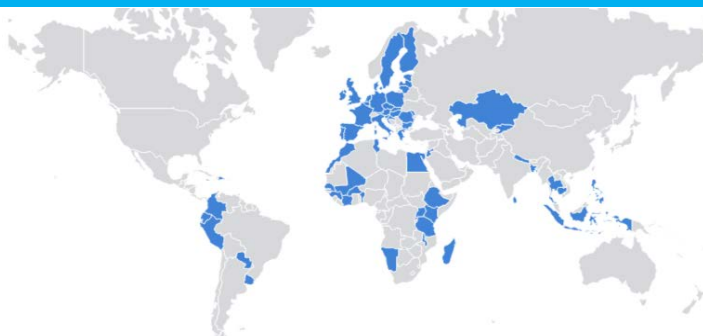
## NTM PROGRAMME ACHIEVEMENTS

Implemented NTM  
Business survey in



67

countries



28,255

Phone Interviews



8,189

Face-to-Face Interviews



Registered over **23,000** trade obstacles (NTM cases)

As reported by companies concerning trade with **185 countries**



**30 publications**

Part of ITC Series on NTMs,  
with over **8,500** downloads



Information on official requirement of

**90 countries**

made publicly available.



Surveys results for

**25 countries**

made available online



For more information:

[www.ntmsurvey.org](http://www.ntmsurvey.org)

Scan the code to visit

### New global trade alert system launched to boost market access for developing countries



A new online alert system, designed to help government agencies and small and medium-sized enterprises (SMEs) **keep track of the latest information on regulatory requirements for international trade**, was launched by the United Nations Department of Economic and Social Affairs (DESA), the World Trade Organization (WTO) and ITC, on 8 November 2016.

The new system, known as **ePing**, allows users to receive email alerts on WTO members' notifications of Technical Barriers to Trade (TBT) and Sanitary and Phyto-Sanitary (SPS) measures covering markets and products of interest to them. It also facilitates dialogue among the public and private sector in addressing potential trade problems at an early stage, linking users to national inquiry points for SPS and TBT.

The system is freely accessible as a global public good. It will also be integrated with the other ITC tools. ITC, UNDESA and WTO will jointly engage in outreach and capacity

building activities around ePing. Please do not hesitate to contact us in case of demand.

For more information visit: [www.epingalert.org](http://www.epingalert.org)

### National stakeholder meeting on non-tariff measures in Comoros, Seychelles, Uganda, Ecuador and Jordan

Between October and November 2016, ITC organized 4 national stakeholder meetings in Comoros, Seychelles, Uganda and Jordan in close collaboration with national authorities.

These meetings are organized following the completion of the NTM survey in the respective countries with the objective of sharing the results and initiating planning of necessary action to alleviate the problems of exporters.

The results of the NTM survey will help the respective country to take a holistic look at all policies and measures that have an impact on its ability to trade, enhance competitiveness and develop its exports. Obtaining greater transparency on NTMs allows for related domestic reform of institutions and policies.

Understanding enterprises' concerns with NTMs will assist the country take concrete steps to alleviate the problems, for example by building national capacity in a number of areas including compliance with technical regulations.



### New technical paper: Indonesia: Company Perspectives – An ITC Series on Non-Tariff Measures

The paper takes a closer look at the major regulatory and procedural obstacles to trade faced by exporters and importers in Indonesia.

As a major palm oil, cocoa, rubber and coffee exporter, Indonesia plays a key role in global and regional commodity markets.

An ITC survey **among 950 Indonesian companies finds that 51% of fresh and processed food exporters face burdensome regulations**. Delays and high costs for technical and compliance requirements are their major trade obstacles. The companies recommended upgrading national testing facilities for accreditation, recognizing conformity procedures, and training programmes for SPS and quality requirements for food exports to overcome barriers.

The Paper is available for download here: [www.ntmsurvey.org/indonesia](http://www.ntmsurvey.org/indonesia).

#### INDONESIA: COMPANY PERSPECTIVES

AN ITC SERIES ON  
NON-TARIFF MEASURES





## Upcoming

- **National stakeholder meetings in Kyrgyz Republic and Ethiopia** are scheduled to take place on 14 and 19 December respectively. ITC will present the first results of the survey in the two countries during the events.
- ITC will present the **results of the business survey in the European Union** on 15 December (Brussels) and 16 December (Geneva). As part of the survey more than 8,100 companies in all 28 EU countries was interviewed on NTM related

barriers they face when export to extra-EU markets.

- ITC in collaboration with UNCTAD is supporting the Ministry of Commerce of Bangladesh develop **e-Regulation portal on trade procedures**. This portal is aimed at helping Bangladesh make rules and procedures fully transparent and to facilitate trade. It will provide companies with a step-by-step guide on required procedures to export certain products

## OFFICIAL LAUNCH OF EXPORT POTENTIAL MAP



**Export Potential Map**  
SPOT EXPORT OPPORTUNITIES FOR TRADE DEVELOPMENT

EN ES FR



What is the export potential for Select a product or country... ?



What are Morocco's products with highest export potential?



What are the best markets for Guatemala's coffee exports?



Into which products could Nepal diversify that have good chances of export success in the United States of America?

Export Potential Map has been officially launched during the World TPO conference in Marrakech (Morocco). The event that took place from 24-25 November gathered trade and investment promotion leaders from around the world (see: <http://www.intracen.org/news/Trade-and-investment-promotion-leaders-to-meet-in-Morocco-to-help-businesses-increase-exports/>).

Export Potential Map is a new web tool in the suite of ITC's market analysis tools that provides guidance to trade support institutions, policymakers and the private sector by translating economic analysis into practical information on trade opportunities.

The tool uses trade, tariff, GDP growth, distance and other data for 221 countries and 4,034

products fed into the Export Potential Assessment methodology, a calibrated trade model developed by the ITC. For each **exporter × product × market** combination, the tool indicates the **potential value of exports and the extent to which this potential is currently untapped**. This will help trade advisers prioritizing products and sectors for national export strategies and support the private sector in finding attractive markets for their exported products. The tool also allows finding **opportunities to diversify into new products that are within reach for the country and have good chances of export success in world target markets**.

Results are presented in *several visualizations and views fitting to your analysis*. The spot view gives a quick overview of exporters, products and markets with (untapped) export potential, the analytical view allows examination

of the drivers of export potential: supply, demand and easiness to export. All graphs can be downloaded, shared through social media and embedded into reports or websites.

## Export Potential

FOR EXPORTER  
Botswana

IN MARKET  
World

PRODUCTSSECTORS

Search products by name/code...

☐ Meat (except poultry)

☒ Other food products

☒ Beauty products & perfumes

☒ Mineral products

☒ Other metals

☒ Paper products

☐ Plastics & rubber

☒ Skins, leather & products ther...

☐ Apparel

☐ Home textiles

☒ Other textile products

☒ Top 20

RESET



## Export Potential

FOR EXPORTER  
Botswana

IN PRODUCT  
Chewing gum

COUNTRIESSUB-REGIONS

Search country...

☐ ASEAN

☐ EU & West Europe

☐ East Africa

☐ East Asia

☐ Middle East

☒ North America

☐ Pacific

☒ SACU

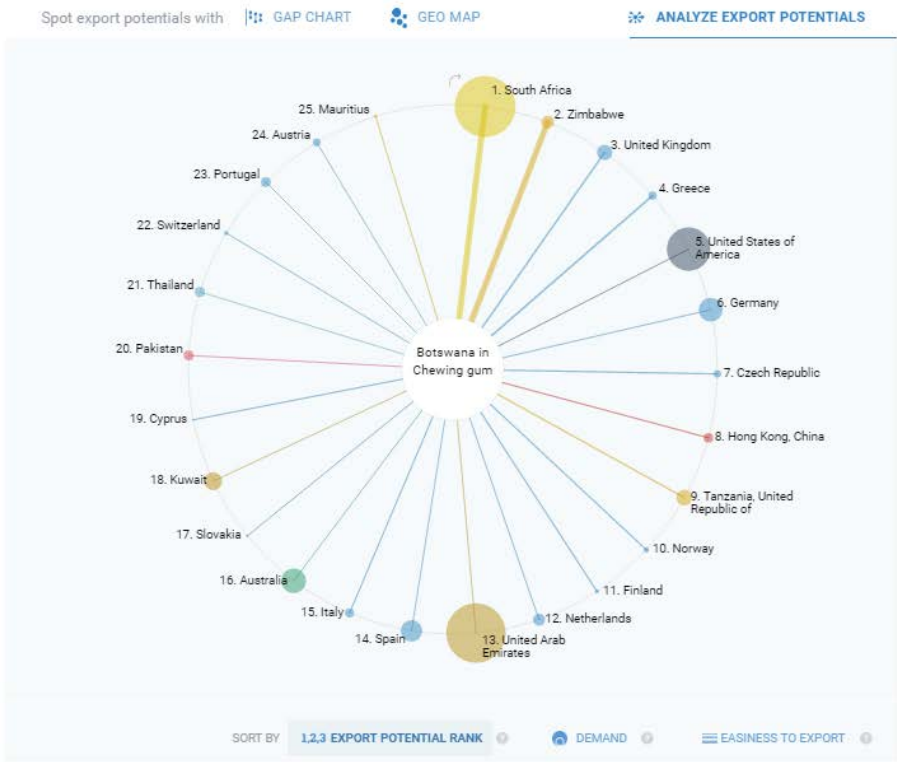
☐ South Asia

☐ Central Africa

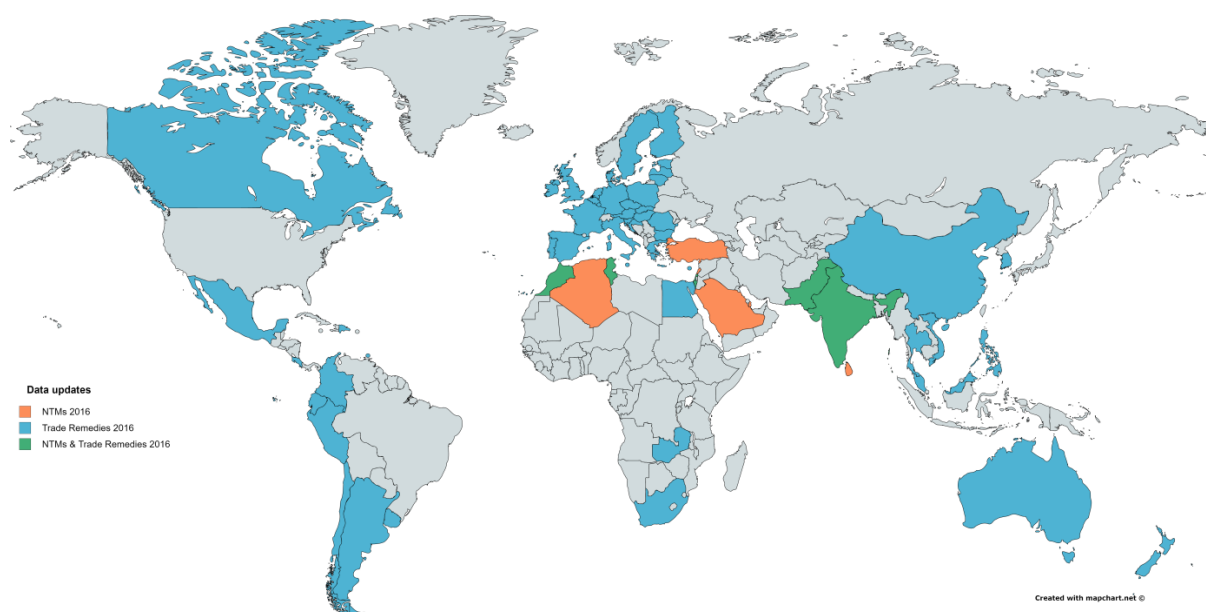
☐ East Europe & Central Asia

☒ Top 25

RESET



## MARKET ACCESS MAP UPDATED DATA & NTM MODULE



In recent weeks Market Access Map has seen substantial updates in both its trade remedies and non-tariff measures (NTM) databases. **Trade remedies data has been updated for 55 countries while the NTM modules on Market Access Map now feature an additional 12 countries with 2016 data.**

In addition our find non-tariff measures module has been redesigned for increased speed and user-friendliness. The revamped interface allows easier consultation of laws and NTM requirements applied by a country to a specific product. Once you have entered your search Market Access Map presents you with a list of relevant regulations and from here you can




simply drill down to identify market requirements for your product.

**NTM information for India**, globally the 13<sup>th</sup> largest importer, has been expanded significantly and now contains information on trade-related requirements from over 260 different regulations. 2016 additions include waste management rules, motor vehicle standards and multiple amendments on food safety standards. For each regulation, trade-related requirements are classified by type and summaries are provided. All this information is easily accessible through the redesigned module and complete legal texts are downloadable for the user's reference.

### Find non-tariff measures

Step 2/3

Requirements applied to 030559-Fish nes, dried, whether or not salted but not smoked exported to India from Bangladesh

Details	Title and summary of the legislation	Requirements specified in the legislation	Document						
	<p><b>Title :</b> Food Safety and Standards (Food Products Standards and Food Additives) Amendment Regulations, 2016 related to standards of salted fish/dried salted fish</p> <p><b>Summary :</b> Dried/salted fish shall be bled, gutted, beheaded, split or filleted and washed prior to salting and drying. Salt used to produce salted fish shall be clean, free from foreign matter, show no visible signs of contamination with dirt, oil, bilge or extraneous materials. The product may contain food additives permitted in the regulation and shall conform to the microbiological and chemical requirement as per the regulation.</p>	<p><b>1 requirement</b> (Details +)</p>							
<div><div></div><div><b>Requirement - 1-Hygienic practices during production (NTM code - A42)</b></div></div> <table><tr><td><b>Measure definition</b></td><td>Requirements principally intended to give guidance on the establishment and application of microbiological criteria for foods at any point in the food chain from primary production to final consumption</td></tr><tr><td><b>Note on the requirement</b></td><td>The fish shall be bled, gutted, beheaded, split or filleted and washed prior to salting and drying</td></tr><tr><td><b>Note on the product</b></td><td>Applies to dried/salted fish. Salted and dried fishery products means the product prepared from fresh or wholesome fish after drying with or without addition of salt</td></tr></table>				<b>Measure definition</b>	Requirements principally intended to give guidance on the establishment and application of microbiological criteria for foods at any point in the food chain from primary production to final consumption	<b>Note on the requirement</b>	The fish shall be bled, gutted, beheaded, split or filleted and washed prior to salting and drying	<b>Note on the product</b>	Applies to dried/salted fish. Salted and dried fishery products means the product prepared from fresh or wholesome fish after drying with or without addition of salt
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## EUROMED TRADE AND INVESTMENT FACILITATION MECHANISM (TIFM)



During the last quarter of 2016, ITC was present in Turkey, Israel and Lebanon to provide trainings to TIFM national technical focal points on how to manage the user enquiries prior to its official launch. It also took this opportunities meet with relevant local trade support institutions to inform them about the EuroMed Trade Helpdesk portal as well as other ITC's Market Analysis Tools. Moreover, ITC had meetings with representatives from customs authorities to discuss the draft of customs procedures guides.

A suite of 10 video tutorials on features and functionality of EuroMed Trade Helpdesk can be found under user support material section of the

portal: <http://euromed.macmap.org/en/support-materials/video-tutorials>). These videos will enable users to carry out market research more efficiently. Videos in French, Arabic and Turkish will become available early 2017.

EuroMed Trade and Investment Facilitation Mechanism is a three year project funded by the European Commission (EC) and implemented by the International Trade Centre (ITC). The official launch of the portal will take place in 2017. Beta version of the portal with latest data is publically available on <http://euromed.macmap.org/>

## TRADE MAP

### HOW DO UNIVERSITIES HELP EXPORTERS THANKS TO THEIR TRADE MAP KNOWLEDGE?



In many countries like Mexico or Peru, trade and investment support institutions collaborate with universities to support local companies in their export development.

### Learning methods – case studies and what else?

ITC has interviewed professors from different universities to understand how they use ITC Trade Map in their course and exercises. We discovered that Trade Map has been regularly used by students for the preparation of market studies.

In Mexico, thanks to a good collaboration between ProMéxico and universities, *“students visit companies that wish to export. With the help of teachers and Trade Map they analyse the export potential of the selected products, they prepare export studies, exports plans and make it happen for real!”* said Ms. Paloma Ruiz Valles, professor at the Technological University of Durango.

In Peru, an interesting approach has also been set up by universities and trade promotion organisations. They organized national prize/competition where students were asked choose a product and use Trade Map to make a complete market study. At the VII Entrepreneurship Event organized by Universidad César Vallejo where PromPerú was in the selection panel, a group of students presented an innovative and promising product with local flair: an energy drink for European markets made of a local maca tuber.

In September 2016, some products initialised during the university competition have also been showcased at Expoalimentaria, one of the largest international trade shows ([http://www.ucvlima.edu.pe/detalle\\_noticia.aspx?id=2381#.VK5O9zSCLQ.facebook](http://www.ucvlima.edu.pe/detalle_noticia.aspx?id=2381#.VK5O9zSCLQ.facebook)). At the same event, PromPerú prominently featured Trade Map to the event-goers.

## TRADE INFORMATION CAPACITY BUILDING WORKSHOP



Within the *Lesotho Horticulture productivity and trade development* project implemented by the International Trade Centre (ITC) and included in the EIF framework Trade Information Capacity Workshop was organized from November 1-3 in Maseru, Lesotho.

The Government of Lesotho has embarked on the commercialization of agriculture, and commercial horticultural production is one of the important development goals. A focus area is the Fresh Fruits & Vegetables (FFV) sector where as much as three quarters of Lesotho's total supply comes from local production, mainly home gardens.

An important component of this project is to improve the collection, analysis, circulation and dissemination of information to stakeholders, in order to facilitate decision making in the context of the implementation of their strategy.

ITC staff delivered a capacity building training to enable 23 trade information officers of Ministry of Trade and Industry, Ministry of Agriculture and Food Security and Ministry of Small Business Development, Co-operatives & Marketing and One Stop Business Facilitation Centre on the development of market intelligence products.



An opportunity was provided to the managers and officers to identify and access the most up-to-date methods, key sources of trade information and information analysis tools for developing various market reports and bulletins capturing vital production aspects of priority products, market trends, demands and requirements using various templates.

The training focused on:

- Improving research skills on sources of market information.
- Developing analytical skills for the analysis of market information.
- Acquainting participants with key features of a market news bulletin.
- Developing customized market news bulletins for selected priority sectors.

The training programme was designed to ensure that the relevant trade information staff of the various target trade support institutions regularly track and disseminate business intelligence in real time, via web, social media to the Lesotho business community.

As a result, the trainees were able to process and organise information on market opportunities, business contacts, market requirements, export checklist and trade fair and exhibition information for apple, cashew and honey market profile.

The participants were also introduced to the ITC Market Insider as a key source of market intelligence and major international information sources including ITC's resources essential for market research such Trade Map, Standards Map, Market Access Map, Eurostat, USD Agricultural Marketing Service and Statistics Division of the FAO (FAOSTAT).

Several meetings were organized with the Minister of Trade and Industry, Joshua Setipa, Permanent Secretary of Ministry of Trade and Industry, Mr. Fusi Notoane, Mr. Lebone Molahlehi, the Director of Agriculture of Ministry of Agriculture and Food Security, the Marketing Director of Ministry of Small Business Development, Co-operatives & Marketing Mr. Lekhohe Makhate.

Along the discussions the training programme was highly appreciated by the respective colleagues and it was suggested to explore a possibility of collaboration with Ministry of Small Business Development, Co-operatives & Marketing on customization and implementation of an embedded Trade Map.

Considering the great results the groups have produced and the tasks completed during training programme, certificates were awarded to the participants by their respective Directors.

During the field visit to the greenhouse beneficiaries in Maseru and Berea districts discussions were held with the farmers on their activities and requirements.

## TRADE FOR SUSTAINABLE DEVELOPMENT (T4SD) PROGRAMME

### Expanding work on environmental issues

ITC's Trade for Sustainable Development team is happy to announce that it has merged with the ITC Trade and Environment team. Our e-solutions and sustainability platforms will now draw from greater expertise, specifically in the areas of climate-smart exports, conservation and biodiversity, and environmental mainstreaming. We look forward to working on a Climate Resilience Toolbox for Small and Medium-Sized Enterprises in the coming year, as well as expanding partnerships for sustainable and transparent sourcing.

See more information about the Trade and Environment program [here](#)



## 43 new initiatives added to Standards Map in 2016

This year, **43 new initiatives were added** to Standards Map, covering products such as soy, gold, textiles, and furniture. There are currently 234 standards in total referenced on the site! The Standards Map team maintains the quality of existing standards information throughout the year so that it remains your roadmap to sustainable trade. Standards Map offers comprehensive, verified and transparent information on standards, covering issues such as environmental protection, work and labour rights, quality and food safety, and ethics.



## A sweet new initiative to support Ghanaian cocoa farmers

The **CHOCOTHON initiative** in Ghana aims to empower and connect cocoa farmers, create new opportunities in cocoa production, and reduce supply disruption risks. The first phase of the event aims to raise awareness and share information on three main topics: the current situation of cocoa international trade and farming practices in Ghana, the International Trade Centre's tools, and tech solutions already available to include Ghanaian cocoa farmers in the supply chain. This is followed by a two-day hackathon, where IT specialists will collaborate

intensively to develop innovative applications to empower cocoa farmers.

This initiative is based on a partnership between ITC's Trade for Sustainable Development (T4SD) project, the Google Innovation Lab for Food (GLF), Business School Lausanne (BSL), Future Food Institute and the Crowdfunding platform. The knowledge partners are Googlers Give Global Leadership Program, Google Accra, Nestlé and Barry Callebaut and the Media partners: Food Inspiration and Food Tech Connect.

### CHOCOTHON

Event dates: 18-25 January 2017

Location: Accra, Ghana

[REGISTER HERE](#)

[More Information](#)



## Joint T4SD/Swisscontact project supporting cocoa farmers in Colombia

The T4SD team and Swisscontact, with the support of the Swiss State Secretariat for Economic Affairs (SECO), initiated a programme to incorporate LBCS (Lineamientos Basicos para un Cacao Sostenible) into the Standards Map online tool to empower cocoa producers in Colombia and raise awareness around sustainability issues required by international certifications. By using the offline/online version of LBCS tool, 1,000 Colombian cocoa producers and 26 cooperatives were surveyed regarding their level on the implementation of sustainable

practices on cocoa production. Upon completing the survey, the producers developed and started implementing improvement plans.

ITC, Swisscontact Colombia and the National Cocoa Network are signing an MOU to implement LBCS as the basis for improving/measuring the sustainable productive and commercial performance of its 56 affiliates – cooperatives of cocoa producers. They are seeking to impact the lives of about 15,000 cocoa farmers in the Colombia.

[Learn more about partnerships](#) with ITC's Trade for Sustainable Development team.

### Joint Report: Social and Environmental Standards

A ground-breaking report by the European University Institute and ITC was launched in September at the World Trade Forum in Florence. By performing econometric analyses of standards data in the T4SD database, the report explores how the design of governance structures of social and environmental sustainability standards help determine how accessible they are to producers in developing countries. In addition, the report offers recommendations on how standard-setting organizations and value chain players can foster inclusiveness and sustainable development, and provides guidance for policymakers on supporting the integration of their SMEs and small farmers into sustainable value chains. Read the report [here](#).

#### SOCIAL AND ENVIRONMENTAL STANDARDS

CONTRIBUTING TO MORE SUSTAINABLE VALUE CHAINS



### Sustainability Map – coming in 2017!

In Q1 2017, T4SD will launch a new platform: The **Sustainability Map**. **Sustainability Map** is a free and user-friendly portal that offers access to wide-ranging information for trade-related sustainability initiatives and standards.

Integrating well-established online tools, such as Standards Map and the SustainabilityXchange, the Sustainability Map will offer new functionalities such as the **Sustainability Network**. The online platform enables users, regardless of their position in the value chain, to improve their performance, visibility and connectivity to new markets.





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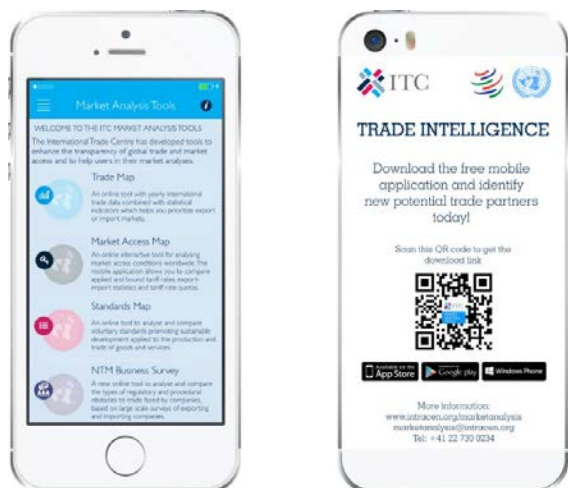
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## ITC TOOLS NOW AVAILABLE ON APP STORES!

Now one of the world's most comprehensive database on trade is available at your fingertips. Download it for free and quickly access the latest information from you smart phones.



Scan this QR code to get the download link



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4C Association

