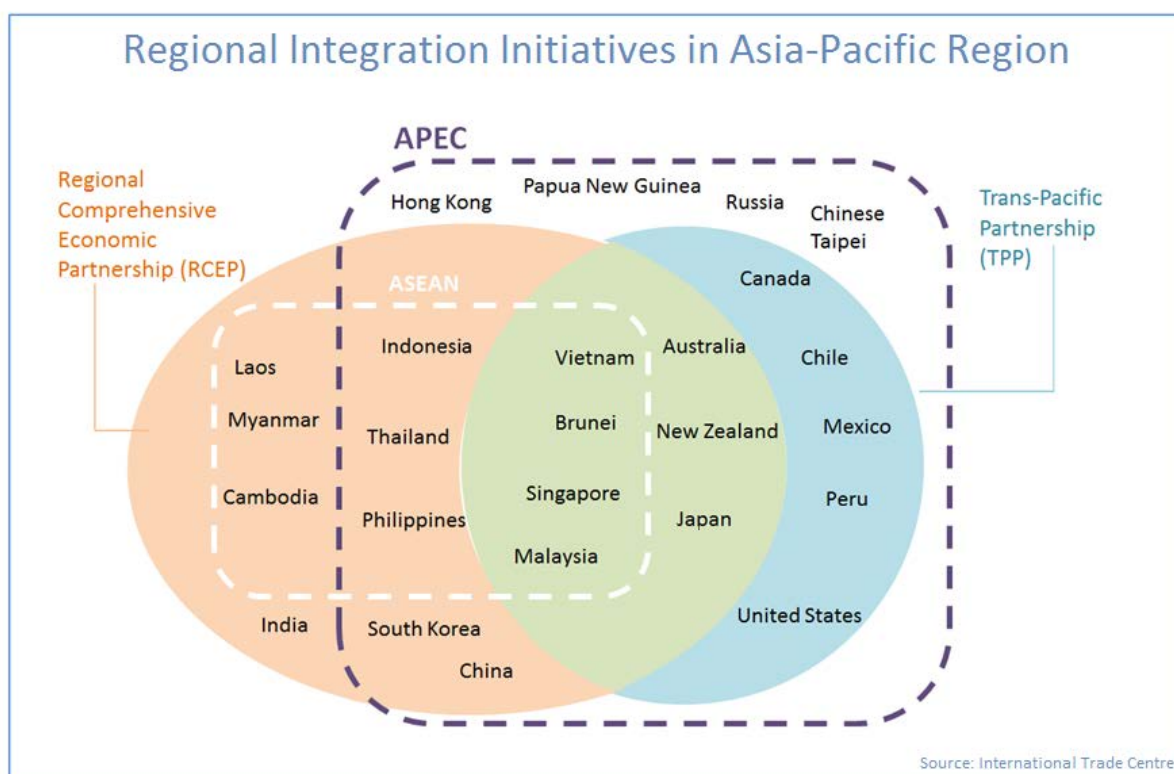


ITC MARKET ANALYSIS SERVICES UPDATE

ENHANCING THE TRANSPARENCY OF GLOBAL TRADE AND MARKET ACCESS

Increasing Transparency in Tariff Elimination under Trade Agreements



Large numbers of interconnected trade agreements containing different tariff reduction schedules over time make it very difficult to judge the economic impact of such agreements and complicate anticipating what tariffs will be applied to a good in coming years.

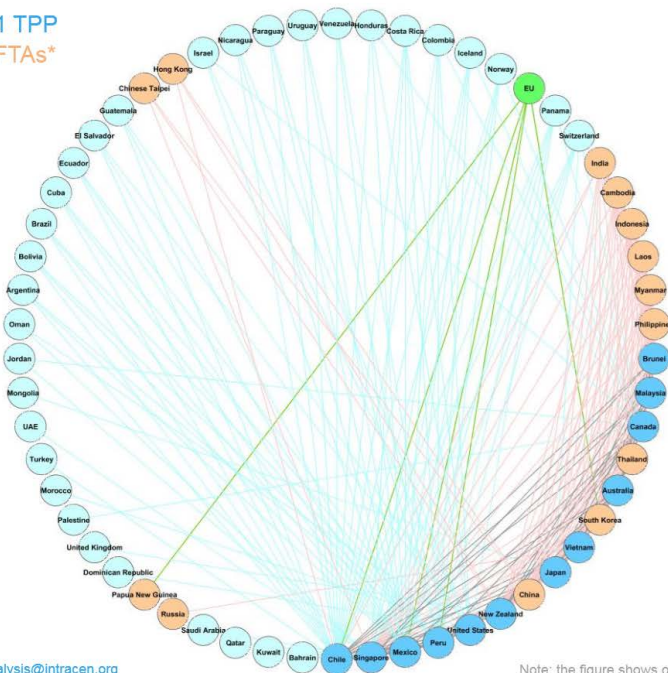
ITC's Trade and Market Intelligence section (TMI) recently completed an analysis of the tariff dismantling schedules of 125 active trade agreements between 25 countries of Asia-Pacific region and the European Union, and of the 12 Trans-Pacific Partnership countries (TPP-12) with country outside of this group. This extensive project was the extension of an initial study covering 37 trade agreements between the TPP-12 and the TPP agreement itself. The resulting data enables researchers and policymakers to derive more reliable

economic estimates behind regional integration initiatives in Asia-Pacific region, such as Regional Comprehensive Economic Partnership (RCEP) and Free Trade Area of the Asia-Pacific (FTAAP). In addition, once integrated into Market Access Map, the database will provide forward-looking information on applied tariffs to exporters.

The new database on Asia-Pacific trade agreements covers the period 2014-2035, contains data at the most detailed national tariff line (NTL) level and represents 40% of all trade agreements in the world or 70% in terms of global trade covered by trade agreements. The project was financed by National Graduate Institute for Policy Studies (GRIPS) in Japan and the United States International Trade Commission (USITC).

FTA Network: Intra-APEC/RCEP/EU + Extra-TPP

37 Intra-TTP FTAs* + 1 TPP
 43 Intra-APEC/RCEP FTAs*
 8 EU FTAs*
 74 Extra-TTP FTAs*



* including GSP

For all inquiries please contact: marketanalysis@intracen.org

Note: the figure shows only reciprocal trade agreements (not GSP)

8 new certified trainers on ITC's Market Analysis Tools



Under the project, Linking SMEs in the fruit and vegetables industry to global and domestic value chains, the final part of ITC Market Analysis Tools' Training of Trainers took place in *Mykolaiv, Ukraine on February 13-15*. All of 8 participants successfully passed examination where they took a full role of a trainer by delivering a one-hour presentation on one of the assigned Ukraine's promising agrifood products by leveraging ITC Tools. Moreover, they were introduced to other innovative databases and trade intelligence solutions such as Standards

Map, Export Potential Map, business surveys on non-tariff measures (NTM), Trade Obstacles Alert Mechanism (TOAM), Trade and Investment Facilitation Mechanism (TIFM), and WTO SPS and TBT notifications alert system (e-Ping).

The newly certified trainers can now deliver effective trainings on ITC Tools to Ukrainian SMEs and help them find the best markets for their products. Since the training in February, two participants have already delivered a webinar and a seminar on the tools locally.

TRADE MAP EMBEDDED GOES REGIONAL WITH THE ISLAMIC CENTRE FOR DEVELOPMENT OF TRADE (ICDT)

The screenshot shows the OIC Trade Map interface. At the top, there are logos for the Islamic Centre for Development of Trade and the OIC Trade Map. The main area displays search filters for Product (08 - Edible fruit and nuts; peel of citrus fruit or melons), Country (All OIC members), and other criteria (Exports, Trade indicators, by country). Below the filters, a table titled 'List of exporters for the selected product in 2015' is shown. The table has columns for HS4, Exporters, Value exported in 2015 (USD thousand), Trade balance in 2015 (USD thousand), and Annual growth in value between 2011-2015 (%). A 'Public tenders' button is highlighted in a red box.

HS4	Exporters	Value exported in 2015 (USD thousand)	Trade balance in 2015 (USD thousand)	Annual growth in value between 2011-2015 (%)
	World	102,178,222	-10,253,889	5
	All OIC members Aggregation	12,666,898	2,275,432	
	Turkey	4,355,366	3,890,800	4
	Iran, Islamic Republic of	1,170,346	1,026,303	5
	Egypt	1,123,147	406,822	3
	Cote d'Ivoire	922,821	910,004	23

The Islamic Centre for Development of Trade (ICDT) has now its own embedded version of Trade Map. Trade data from the [57 ICDT member states](#) is made available on the ICDT-OIC website using the latest Trade Map

features. Public tenders published by ICDT member states are also accessible through OIC Trade Map. This information is updated on a daily basis.

Tailor your trade indicators table

New column picker

The screenshot shows the 'Standard indicators (latest available year)' and 'Trend indicators' selection interface. A 'New column picker' callout points to a table of selected indicators. The table has columns for Value imported in 2015 (USD thousand), Trade balance in 2015 (USD thousand), Annual growth in value between 2011-2015 (%), Annual growth in value between 2014-2015 (%), and Share world imports.

Value imported in 2015 (USD thousand)*	Trade balance in 2015 (USD thousand)	Annual growth in value between 2011-2015 (%)	Annual growth in value between 2014-2015 (%)	Share world imports
16,473,390,865	-237,868,350	-2	-12	
2,306,822,200	-802,951,800	1	-4	
1,681,670,816	600,185,106	0	-14	
1,057,616,400	270,932,700	-3	-13	
630,251,058	-163,955,375	-2	-9	

Select additional indicators and customize columns

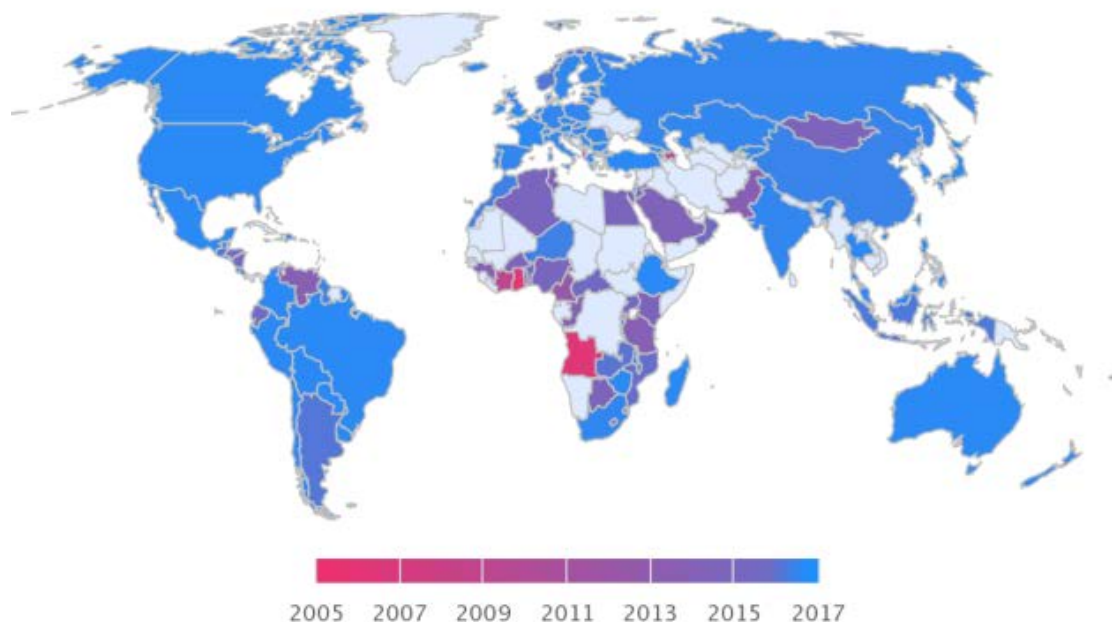
Gain more flexibility with the new Trade Map column picker for trade indicators. Pick and choose from a wider range of indicators and keep only what is relevant to your analysis. *Ease of doing business - World Bank ranking*

is now available to go further in your search for market opportunities. This new indicator is the first of many more to come in Trade Map. Stay tuned.

Full 2016 monthly data are available for more than 35 countries

Trade Map – Monthly data availability

Most recent periods available in Trade Map



In its continuous effort of publishing the latest available data, Trade Map is proud to bring already 97 countries to you with 2016 monthly data, among which 37 until December 2016.

Trade Map data availability is accessible on this interactive map: http://www.trademap.org/availability/monthly_availability.html

EUROMED TRADE AND INVESTMENT FACILITATION MECHANISM (TIFM)

In January 2017, ITC market analysts delivered a capacity building session on the user enquiry management system of the EuroMed Trade Helpdesk for Palestine's National Focal Points at the Ministry of Economy. ITC also took this opportunity to meet with the Customs Authority and the Palestinian Central Bureau of Statistics to inform them about the EuroMed Trade Helpdesk portal as well as other ITC's Market Analysis Tools and services.



During ITC Women Vendor Exhibition & Forum (WVEF) in Istanbul on 23-24 February, EuroMed Trade Helpdesk was presented to the audience of women textile exporters and to the Women Entrepreneurs Association of Turkey, KAGIDER. Ms. Yesim Sevig, KAGIDER's Secretary General, was impressed with potential the portal could offer to its members in the future.

EuroMed Trade and Investment Facilitation Mechanism (TIFM) 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 be in June 2017. Beta version of the portal with latest data is already publicly available on <http://euromed.macmap.org/>



T4SD AND ITS PARTNERS LAUNCH THE CHOCOTHON



The first phase of the *Chocothon initiative* was launched in January 2017 in Ghana bringing together a diverse range of experts from the cocoa community (private, public sector and cocoa farmers) during eight days of activities in Accra and Kumasi.

The activities aimed at raising awareness about the challenges faced along the cocoa supply chain in terms of implementing sustainable practices and organizing trainings to multipliers (training of trainers) and farmers about sustainable farming practices.

The first activity featured *a three-day conference (January 18-20)* hosted at the Impact Hub in Accra. It focused on raising awareness and sharing knowledge about the current context of international trade in cocoa, farming practices in the Ghanaian cocoa sector and the related ITC web-based platforms. Among attendants there were buyers, affiliated/identified producer organizations, national institutions and software developers.

A two-day hackathon (January 21-22) followed the first activity of Chocothon, bringing web developers, social entrepreneurs and cocoa agriculturalists to collaborate intensively on low-tech solutions to reduce sustainability challenges for cocoa production. Three teams participated in the hackathon with the aim to deliver innovative solutions to address problems in the cocoa supply chain. The winning team, Cocoa Sika, developed a mobile and web application prototype to provide farmers with access to low interest loans.

An additional event took place in Kumasi, from January 23-25 aimed at training cocoa producers' representatives and producers'

coaches in the use of market analysis and sustainability related tools. The objective was to provide better technical assistance on sustainable production practices to producers.

The Chocothon initiative was organized by T4SD together with Google Food Lab (GFL), Business School Lausanne (BSL), Future Food Institute and the Crowdfunding platform. The knowledge partners were Googlers Give Global Leadership Program, Google Accra, Nestlé and Barry Callebaut.

The overarching goal of the initiative was to promote a shared value sustainable cocoa supply chain by:

- *sharing knowledge* among platform members about challenges and solutions for sustainable cocoa supply chains;
- *connecting stakeholders* using cutting edge technology to tackle obstacles to link upstream to downstream actors in the cocoa supply chain;
- *empowering producers* through the development of customized training and tools that contribute to solving the sustainability challenges they experience.

Next steps of the Chocothon initiative include a second mission in Q3 to deliver training activities to cocoa cooperatives' lead farmers and extension officers on sustainable cocoa practices, as well as field-testing of Cocoa Sika's winning hackathon solution.

For more information about the Chocothon initiative, please visit www.chocothon.com

At ITC, please contact cabrera@intracen.org

JOINT PROJECT WITH ILO “SPOTTING EXPORT POTENTIALS FOR EMPLOYMENT”



Since the beginning of 2017, ITC supports the International Labour Organization (ILO) in the identification of export sectors and products that offer the best employment perspectives. The work will inform an ILO project with the overall aim to *“strengthen the capabilities of country partners to analyse and design sectoral and trade policies and programmes that would enhance employment creation in terms of quantity and quality.”* The project is implemented in six countries: Benin, Ghana, Guatemala, Morocco, Myanmar and the Philippines. The project is implemented in six countries: Benin, Ghana, Guatemala, Morocco, Myanmar and the Philippines.

In each country, ITC applies its export potential and diversification methodology to identify the products or sectors.

- with (untapped) export potential in traditional or new target markets,
- that offer opportunities to diversify the country's export basket.

Untapped export potentials are then used to project production and subsequently direct and indirect employment effects. The direct effect reflects in an increase of demand and eventually employment in the sector with untapped export potential.

The indirect effect arises from stronger demand for inputs that enter into the production of the good for which final demand has increased. The production of these inputs again requires inputs, triggering a multiplier employment effect across various sectors of the economy.

First results for Morocco were presented during *a stakeholder event in Rabat from 14-16 February 2017*. Interestingly, the sectors with largest untapped export potentials are not necessarily the ones with greatest possibilities for job creation. Realizing the US\$ 1.6 billion potential in clothing could possibly translate into 113,492 new jobs in the sector, but would not generate much employment in upstream sectors like cotton or textile because inputs into the clothing industry are largely imported. On the other hand, making use of the slightly lower export potential in *agro-food and beverages may create “only” 12,044 jobs in the sector but 165,070 jobs in related input industries*. The analysis is done for total and female employment: while women would hardly benefit from additional fish exports, they are well represented in clothing, textile and leather sectors.

Similar analyses will be conducted and presented in each project country until August 2017.



ITC'S PROGRAMME ON NON-TARIFF MEASURES

National stakeholder meeting on non-tariff measures in Kyrgyzstan and Ethiopia

ITC organized *two national stakeholder meetings on non-tariff measures in December 2016*. The two events were held in Kyrgyzstan and Ethiopia in close collaboration with national authorities of the respective countries.

The national stakeholder meetings on NTMs 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.

Regional Trade Information Portal and Trade Obstacles Alert system for the West African Economic and Monetary Union (WAEMU).

ITC will develop a *WAEMU regional Trade Information Portal* that will also include a regional Trade Obstacles Alert (TOA) system.

The TOA system will enable companies in the region to report regulatory and procedural obstacles to intra and extra-regional trade to alert the competent authorities. It will also help policy makers at the national and regional level to assist companies in their trading activities by understanding better and on real time their daily constraints.

The trade information portal will also combine information on trade opportunities for businesses including company directory and ecommerce platform.



The WAEMU trade portal will be launched in 2018 within the framework of an EU-funded project and following the recommendations of a study on West African trade barriers

New technical papers: Navigating Non-Tariff Measures: Insights from a business survey in the European Union

European exporters have similar experiences with non-tariff measures (NTMs) as developing countries, especially for procedures related to technical regulations, conformity assessment and rules of origin.

An ITC-European Commission survey, based on 8,100 company interviews in all 28 European Union (EU) countries, reveals that *more than a third of European exporters encounter burdensome NTMs, both within their*

countries and in destination markets. The report, unprecedented in scope, provides insight into trade-related technical assistance, so that developing countries improve their capacity to trade with the EU. It also serves as a foundation to integrate the voice of European businesses in trade negotiations and policymaking.

The paper is available for download here: www.ntmsurvey.org/eu

Thailand: 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 Thailand.

Thailand, one of the world's most export-driven economies, is a leading exporter of rice, various food products and electronic components.

ITC surveyed over 1,000 Thai companies to understand their perceptions of non-tariff measures (NTMs). *Overall, 38% of Thai*

exporters are affected by burdensome NTMs. Difficulties proving compliance to technical requirements, administrative hurdles relating to obtaining certificate of origins and border clearance procedures are the key concerns of exporters. The study also finds Thai authorities taking appropriate measures to address companies' concerns and facilitate trade.

The paper is available for download here: www.ntmsurvey.org/thailand

NAVIGATING NON-TARIFF MEASURES
INSIGHTS FROM A BUSINESS SURVEY
IN THE EUROPEAN UNION



THAILAND:
COMPANY PERSPECTIVES
AN ITC SERIES ON
NON-TARIFF MEASURES



TRADE IMPACT
FOR GOOD

Upcoming events and publications

- *NTM business survey in Sudan*: is scheduled for launch in Q2, 2017. ITC will interview around 300 active exporters in Sudan to identify the major trade obstacles they face.
- *Seven new publications*: on ITC series on NTMs will be published in Q2, 2017. These reports highlight the major obstacles to trade faced by exporters in the Philippines, Nepal,

Bangladesh, Benin, Mali, Comoros and Seychelles. The results are based on national level business surveys in the respective countries.

- The NTM Survey report on Philippines would be release at end-March in Manilla during the Working Group on NTMs led by the Department of Trade and Industry.



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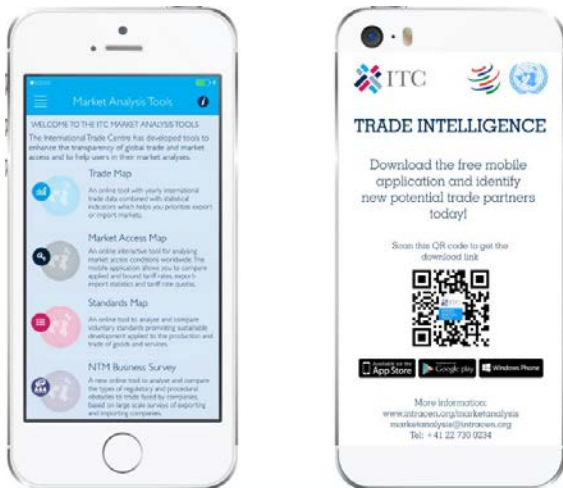
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