

## DISCOVER OUR YEAR HIGHLIGHTS

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### NON-TARIFF MEASURES PROGRAM

#### ITC and Vietrade launch project to improve Viet Nam's trade competitiveness



**ITC's NTM project in Viet Nam was officially launched on 21 November 2018 in Hanoi. During the event, the ITC team had the occasion to present the objective and the scope of the project to the national stakeholders. About 90 participants attended the launch event including small and medium-sized enterprises representatives, trade support agencies, students and government staff.**

In support of Viet Nam's efforts to improve trade competitiveness, ITC will leverage its expertise in the area of non-tariff measures (NTMs) to help reduce trade cost related to NTMs and to increase the transparency and understanding of NTMs and related procedures.

In short, the key points of the ITC NTM project for Viet Nam are:

- NTM Business Survey (goods and services) : to identify the most challenging trade regulations and procedures faced by Vietnamese companies

- Stakeholder consultations: to define feasible actions to overcome existing trade obstacles and reduce trade cost
- Capacity building on NTMs: to develop the capacity of policy makers, trade support institutions, small and medium-sized enterprises (SMEs) as well as academia on NTMs.

Enhancing transparency on rules and procedures: ITC will make use of its comprehensive databases and public data dissemination tools to help rendering trade more predictable in terms of time and cost.

ITC's program on NTMs in Viet Nam is implemented in close collaboration with national partners to ensure maximum impact on the ground. Vietrade – Vietnam Trade Promotion Agency is ITC's main coordination partner. Throughout December, the ITC team will coordinate training sessions with the local partners in charge of the NTM Business survey interviews. Project stakeholders will be kept informed through regular project meetings.

More information on the project is available at: [www.ntmsurvey.org/vietnam](http://www.ntmsurvey.org/vietnam).

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**COMING NEXT:** ITC NTM projects are also underway in Ghana and Niger. Stakeholder consultations in October 2018 helped refining the 2019 work plan and underline the close cooperation of public and private sector partners with ITC with a view to boost both goods and services trade.



## New capacity building offer on NTMs presented at the MENA region

ITC has launched a capacity building tour in five countries of the Middle East and North Africa (MENA) focused on non-tariff measures. Funded by USAID, the initiative is part of a project to foster regional integration by increasing the transparency about the market access requirements.

The trainings emphasized the understanding of market access conditions, including basic concepts and information sources such as ITC's [Market Access Map tool](#), the [Rules of Origin Facilitator](#) and the alert system for WTO notifications on SPS and TBT measures ([ePing](#)). "The workshops really covered the main aspects of trade. It was very useful", said one of the participants in Algeria. After the conclusion of the sessions, the participants in Algeria, Morocco, Tunisia,

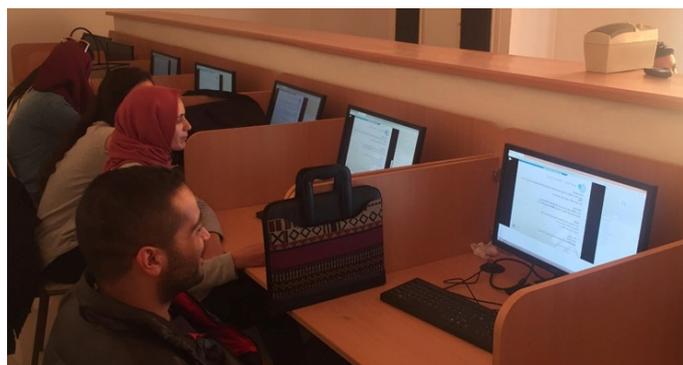


Jordan and Egypt were ready to apply the skills they acquired in their daily work and use ITC tools & methodology to make informed and actionable trade decisions. Many of the attendees expressed their willingness to participate to more workshops next year, notably for the issues of Rules of Origin.

## Public webinar in Arabic on ITC Tools

How to use more efficiently ITC's market analysis tools? How learn more about market access? Those questions and many others were answered at the online training in Arabic provided on the past 19th November. The webinar convened entrepreneurs, students, scientists, researchers, trade specialists and business owners. Female participation was high. Out of 50 attendees at the webinar, 27 were women. In 2019, ITC will deliver a new round of webinars for the Arab speaking audience.

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## WTO Public Forum's agenda includes discussions on Non-Tariff Measures



Policy makers, representatives of government, business, workers, consumers and civil society gathered at the World Trade Organization Forum in Geneva from the 2nd to the 4th October.

Under the main theme of "Trade 2030", the Public Forum discussed subjects such as sustainable trade, technology-enabled trade and a more inclusive trading system. At the panel "Market Access Strategies and Technology: Monitoring Non-Tariff Barriers", ITC's head of the programme on Non-Tariff Measures, Ursula Hermelink, pointed out that high quality information and alert tools to monitor NTMs are key elements to avoid unnecessary trade costs.

The full programme of the WTO Public Forum can be found here: [https://www.wto.org/english/forums\\_e/public\\_forum18\\_e/pf18programme\\_e.htm](https://www.wto.org/english/forums_e/public_forum18_e/pf18programme_e.htm).

## UEMOA puts in place the Trade Obstacles Alert Mechanism



The Trade Obstacles Alert Mechanism (TOAM) of UEMOA was launched in March at Abidjan, Côte d'Ivoire. This mechanism allows companies in the eight UEMOA countries to alert the local and regional authorities of the daily constraints they face to trade

their goods thanks to an online reporting system. The local and regional authorities can nowadays provide the appropriate answer or solution in return through the system, generating a flow of emails that anyone can get instantly. The tool comes together with an institutional network across the 8 UEMOA countries to ensure any concern is addressed on time. As of today, almost 700 users have registered to the online platform including 350 businesses, reporting a total of 90 obstacles including 80 within the region. This tool is a response to the trade challenges pointed out at the NTM surveys implemented in the region. To sustain the mechanism and its promotion to the private sector, ITC provided 15 training across West Africa to more than 400 entrepreneurs and government officers.

See [www.tradeobstacles.org/uemoa](http://www.tradeobstacles.org/uemoa) for more information.

## New Publications

### ETHIOPIA: COMPANY PERSPECTIVES

Ethiopia's export sector has grown rapidly in recent years, but an array of non-tariff measures (NTMs) are preventing businesses in the country from performing even better in international markets.

According to a survey of Ethiopian exporters, importers and producers by the International Trade Centre (ITC), 96% of trading companies report difficulties related to the application and implementation of NTMs. Exports are much more affected than imports: 90% of exporting companies

report facing burdensome NTMs, while only 56% of importing companies report such problems.

This report is available for download in English at: [www.ntmsurvey.org/ethiopia](http://www.ntmsurvey.org/ethiopia).

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



International  
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TRADE IMPACT  
FOR GOOD

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### A series of practical guides designed to help African exporters export to USA under AGOA



Last October, the NTM team was pleased to participate to a regional workshop on the export culture in Dakar, Senegal, and present the newly designed guides on how to export to the United

States from the 8 UEMOA countries (Benin, Burkina Faso, Côte d'Ivoire, Guinea Bissau, Mali, Niger, Togo

and Senegal). These guides provide practical and user-friendly information on step-by-step procedures to export 3 key products from each of the 8 countries such as mango, shea butter, dried pineapple, fabrics or wooden handicraft.

Presented in Dakar to government representatives of the 8 UEMOA countries, the guides are being validated in order to be published and disseminated to West African exporters in early 2019. They aim at boosting trade between the region and the United States under the African Growth and Opportunity Act (AGOA).

## TRADE FOR SUSTAINABLE DEVELOPMENT (T4SD)

### How can businesses increase their competitiveness

In 2018, T4SD implemented a project in Morocco and Kenya aimed at strengthening SME competitiveness through climate resilience in international value chains. The project was financed by the German Federal Ministry for Economic Cooperation and Development (BMZ) and targeted the textile and agro-processing sectors in Morocco, and the tea, coffee and cut flowers sectors in Kenya. The overall objective of this project was to support SMEs to integrate climate-change considerations into their corporate risk analysis and to create climate adaptation strategies that comprise practical and bankable measures.



Group picture—Closing workshop—Nairobi  
20th November 2018

The final project workshops in Casablanca and in Nairobi provided the opportunity to the beneficiary SMEs and local experts to present their climate change adaptation strategies to a broad audience of buyers, associations, government representatives and financiers, as well as to obtain guidance on how to access green finance. The numerous climate change adaptation measures identified include for instance: in

Kenya, the set-up of small water dams for tea cooperatives in order to deal with heavier rains, the planting of shade trees in order to increase coffee quality and productivity; in the Moroccan textile sector, the installation of double-roof units in order to better control the workspace temperature impacted by an increasing number of heat waves.



Textile factory—Morocco—Casablanca  
November 2018

The project highlighted the urgent need for SMEs to build capacity and skills to actively manage climate-induced risks and to strengthen awareness and accessibility of climate and green finance. The project also showed that climate change adaptation can be positively fostered by collaboration among all actors of the international value chains as well as by building private sector alliances on sustainability issues.

In Q1 2019, ITC will publish three reports summarising the lessons learnt of working on SMEs' climate resilience: a handbook on how to work on climate change in international value chains, a report on climate resilience in the Moroccan textile sector as well as in the Kenyan coffee and tea sectors.

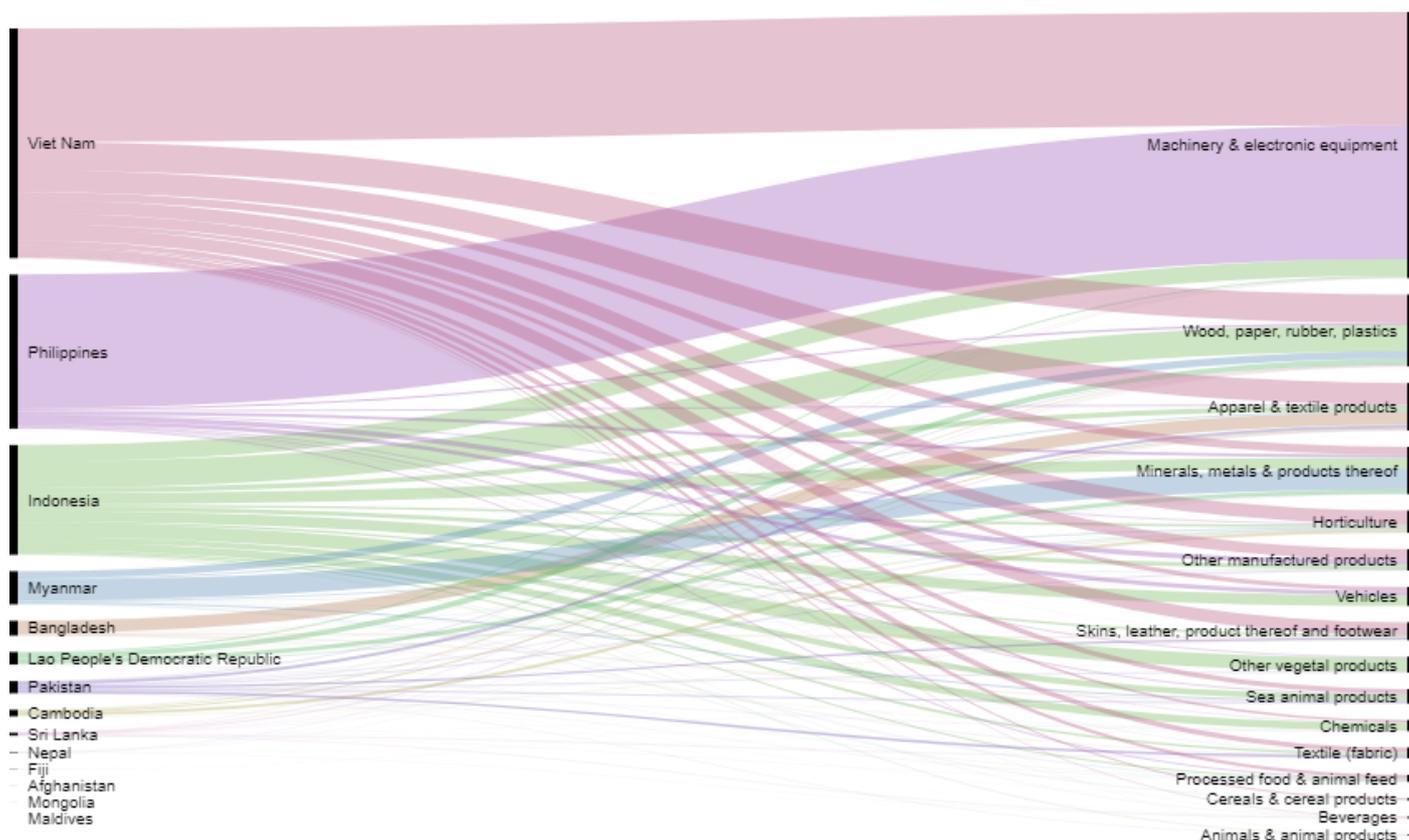
## EXPORT POTENTIAL ASSESSMENT

### Identifying opportunities for export growth in Asia and the Pacific through the China Belt and Road Initiative (BRI)

Within the framework of the "Trade Promotion between China and other Developing Countries along the Belt and Road Initiative" with the support of The Ministry of Commerce of the People's Republic of China (MOFCOM), this study of 14 countries from the Asia and the Pacific region seeks to shed light on opportunities for export growth within the Chinese market. The analysis demonstrates that there is significant scope for increasing exports to the Chinese

market. If economic growth continues according to forecasts and countries are able to address relevant market frictions, the 14 countries could realize an additional \$51.8 billion of exports by 2021. Nearly 55% of the region's export potential in the Chinese market remains unused. The greatest share of opportunities for the region lies in the machinery and electronics, wood, paper, rubber and plastics, and the apparel and textile sectors.

## Graph: Unrealized export potential in the Chinese market by sector from countries in the Asia and the Pacific region



**Note:** The data used in this graph utilizes a mix of direct and mirror data for an average of the 2012-2016 period, in accordance with the rigorous reliability check outlined in the Data section. Minerals and other products are excluded.

**Source:** ITC calculations, based on data from ITC Export Potential Map ([exportpotential.intracen.org](http://exportpotential.intracen.org))

Nevertheless, realizing these opportunities to their fullest potential will require additional efforts to overcome existing market frictions on the part of exporting countries in several regards. For the region as a whole, \$12.1 billion of additional exports could be realized if relevant market frictions were addressed.

TISIs need to work closely with exporters and sector associations in their countries to offer their support in overcoming these challenges. This includes working on 'behind-the-border' processes and strengthening institutional capacities to ensure that the necessary documentation and processes required for exporting high potential goods function effectively. In addition, increasing transparency and exporter familiarity with

Chinese import and customs procedures particularly for exporters in high potential sectors to ensure compliance with all product standards, regulations, and preferential access requirements is also crucial. Helping exporters better understand consumer preferences and purchasing behaviours, as well as relevant private and public voluntary standards is particularly important for realizing the potential for products that are currently successfully exported to other markets but have not yet entered the Chinese market. Exporters could also benefit from assistance in building their business network of direct buyers in China, such as through participation in trade fairs, as well TISI guidance on branding, labelling and packaging specificities for the Chinese market.

### Presentations at "Regional Workshop on Evidence-Based Trade Policy Making for Sustainable Development", organized by UNESCAP in Bangkok, Thailand



An audience of ca. 60 senior- to mid-level policymakers and researchers from the Asian-Pacific region gathered for this 4-day workshop covering emerging issues in trade and investment, including policy implications of recent trade frictions, the rise of non-tariff measures, and LDC graduation – all in the context of the 2030 Sustainable Development Agenda as well as technical training on statistical software on data management, gravity modelling and trade analysis.

ITC spoke on two topics:

**“Assessing and reaching trade potential”** with a special focus on the use of export potential data to inform trade policy negotiations. A case study to simulate the trade impact of Lao’s graduation from LDC status showed that Lao could largely compensate potential losses from post-graduation tariff increases through targeted trade advisory. While untapped export potential augments to \$6.3 billion, tariff changes would reduce exports by \$79 million, according to new ITC research. For the apparel sector, which accounts for 55% of the of the total trade reduction, applying for the more preferential GSP+ rather than the GSP regime on the EU market could lower the impact of graduation to \$18 million.

**“Private sector perspective on NTM”**, presenting evidence from the ITC business surveys on regulatory and procedural trade obstacles and related insights on how to reduce NTM-related trade cost. The surveys meanwhile cover over 65 countries and involved interviews with nearly 30,000 companies to date. Survey results underline that what matters most, to

exporters and importers alike, is clarity of the trade-related rules and procedures, consistency of their application and procedural efficiency. They also show that there is ample scope for reducing trade cost that NTMs imply without undermining legitimate objectives that many regulations serve, and that much of these trade cost can be tackled at home, i.e. in the exporting country. ITC and ESCAP are currently working on a dedicated publication summarizing survey insights on regional integration in Asia and the Pacific, which will be released in the course of 2019.



## RULES OF ORIGIN FACILITATOR

### International organizations discussed the present state of transparency on non-preferential rules of origin

**Geneva, 16 October** - ITC took part in the meeting of the Committee on Rules of Origin (CRO) at the World Trade Organization (WTO), along with speakers from the World Trade Organization (WTO) and World Customs Organization (WCO), where issues of transparency, data availability and the vital importance of improving access to rules of origin-related information were discussed.



Experts agreed that information gaps pose challenges to trade policymakers, customs offices, and private sector. Speaker on behalf of WTO secretariat underscored the necessity of improving transparency through enhanced notification of non-preferential rules

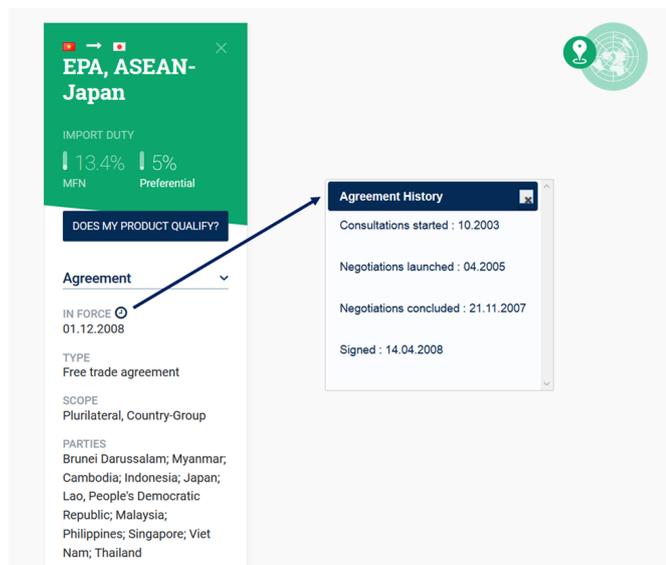
of origin information (presentation slides [here](#)). WCO stressed that lack of information on non-preferential rules of origin limits the predictability and transparency of international trade, increasing cost and uncertainty to the detriment of importers, exporters and consumers (presentation slides [here](#)). ITC speaker presented to the WTO members the new joint initiative to bring more transparency to origin requirements in trade agreements and non-preferential regimes: Rules of Origin Facilitator accessible at [findrulesoforigin.org](http://findrulesoforigin.org).

The portal integrates detailed rules of origin information for 120 trade agreements mapped with applicable duty rates<sup>1</sup>. It also incorporates non-preferential rules of origin applied by Switzerland, the European Union, and the United States. The experience of constructing this database revealed that non-preferential rules of origin can be more complicated for firms than preferential rules of origin due to multi-purpose use, changes in national origin legislation, complexity of primary and residual rules, availability only in national languages, origin procedural information hidden in voluminous national customs acts, and a disharmony of non-preferential rules of origin between the exporting and the importing countries (presentation slides [here](#)).

<sup>1</sup> The duty rates are sourced from the regularly updated ITC’s Market Access Map tariff database ([macmap.org](http://macmap.org))

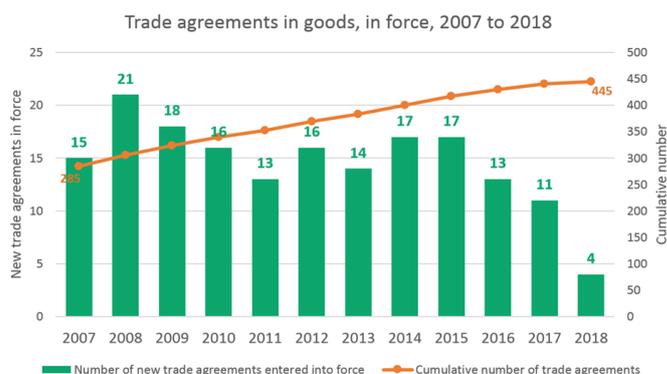
## Learn trade agreement history with Rules of Origin Facilitator

Users of Rules of Origin Facilitator can now access historical milestones of a trade agreement by clicking on a time icon.



For example, in the case of ASEAN-Japan free trade agreement (illustration above), the consultations for the agreement started in October 2003 as a result of ASEAN-Japan Summit in Bali. Negotiations were launched in April 2005, and after eleven consecutive rounds the negotiations were concluded on 21 November 2007. The agreement text was signed by the parties on 14 April 2008, and after domestic ratification procedures, it was brought into force on 1 December 2008.

This information is part of ITC's trade agreements database and it has been made available publicly for the first time. The database covers more than 400 trade agreements in force, including texts and proofs of origin, and another 400 trade agreements that have been under consultations, negotiations, or are inactive. The statistics show (figure below) that the number of trade agreements in force has risen dramatically in the past ten years by 60% creating a "spaghetti bowl" leading to a confusion among exporters and importers who seek to take advantage of them. The pace however slowed down in the recent years, with only 4 free trade agreements brought into force in 2018, and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) scheduled to become 5th.



Note: Trade agreements in goods cover both regional trade agreements and preferential trade arrangements

Source: ITC trade agreements database (findrulesoforigin.org), extracted on 03.12.2018

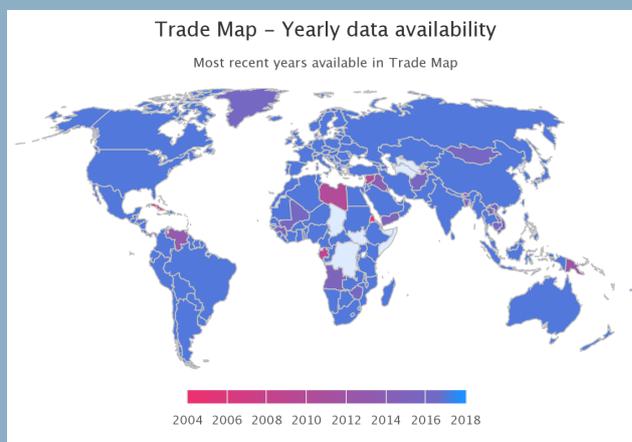
## ITC TOOLS UPDATES

### Trade Map's Trade Indicators update

Trade Map is more than ever one of the biggest trade flows database in the world. The database is constantly updated with the latest trade data from all over the world.

Following an important update in Trade Map on September 2018:

- 2017 global trade indicators are now available, based on data reported by 145 countries. You can get the complete list of available annual data by clicking [here](#). A new update will be done before the end of 2018.
- Monthly trade data is available until December 2017 for 92 countries and until September 2018 for 62 countries. You can get the complete list of available monthly data by clicking [here](#).



## Rules of Origin Facilitator

Rules of Origin Facilitator has added new data on more than 30 trade agreements, among which are regional and bilateral trade agreements between Arab states, as well as CARICOM, SADC, ECOWAS, COMESA and EAC, and US-Mexico-Canada Agreement (USMCA).

Take advantage of these trade agreements now by clicking on [findrulesoforigin.org](http://findrulesoforigin.org)!

## Export Potential Map

Export Potential Map updated its results in November with new base years for trade flows of 2013-2017 and projections for 2022 based on growth forecasts from the IMF. In addition, we enhanced the methodology in several respects. First, we altered the weighting scheme to put more emphasis on recent years. Second, we expanded product coverage to include chapter 28 and electrical energy. Finally, we revamped the reliability assessment evaluation of trade data reporters.

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# TRADE AND MARKET INTELLIGENCE 2018 HIGHLIGHTS

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## ITC TOOLS FAMILY

We thank you for being on board with us over the past few years. Thanks to your support the ITC tools community has grown by 17% in 2018. Your comments and suggestions are extremely valuable on our journey of providing better service. Stay tuned in 2019 for new features and developments that will guide you in your journey towards the global trade intelligence world.

## NEW: THE MARKET PRICE INFORMATION PORTAL

In July, ITC launched an innovative new online platform: Market Price Information (MPI). The portal provides MSMEs, Trade Support Institutions and policy makers with, accurate international market prices and market news updated on a daily, weekly or monthly basis as well as local market prices detailed by variety, quality, origin, destination packaging and many other many other characteristics for more than 300 products. Market Price Information is the successor of the ITC Market News Service (MNS), created over forty years ago. Discover it at [mpi.intracen.org](http://mpi.intracen.org).

## NEW: THE RULES OF ORIGIN FACILITATOR

In June, the section launched its new Rules of Origin Facilitator. The free online portal is designed to help MSMEs to understand easily the applicable rules of origin to their products and get the most benefits from available trade agreements via a simple search function. Access it at [findrulesoforigin.org](http://findrulesoforigin.org).

## ITC & UEMOA WEB SOLUTIONS

ITC and the West African Economic and Monetary Union launch new web solutions for companies in the UEMOA countries to benefit from trade opportunities and remove obstacles within the region. Discover [ConnectUEMOA](#) and the [UEMOA Trade Obstacles Alert Mechanism](#).

## WORLD TARIFF PROFILES

In July, ITC, in collaboration with WTO and UNCTAD, released its annual report World Tariff Profiles, which provides a statistical overview of tariff policies and non-tariff measures applied by 175 countries and territories. The publication is available at [www.intracen.org/publication/World-Tariff-Profiles-2018/](http://www.intracen.org/publication/World-Tariff-Profiles-2018/).

## EPM MALAWI AND MALAWI STUDY

In March, ITC published [Exploring Malawi's Export Potential](#). The study provides a roadmap for Malawian exporters and policymakers to identify higher value-added products and markets with growth potential, as well as giving guidance to realize these opportunities and overcoming production challenges.

In April, Export Potential Map • MALAWI, the first customized spin-off of the global ITC Export Potential Map web tool ([exportpotential.intracen.org](http://exportpotential.intracen.org)), was launched in Lilongwe. This country-tailored tool features new interactive modules that allow the user to find opportunities for regional integration in both traditional exports, as well as opportunities for value chain development and upgrading into transformed products.

## OPPORTUNITIES THROUGH THE BRI

In November, we finalized "Identifying opportunities for export growth in Asia and the Pacific through the China Belt and Road Initiative". The study sheds light on opportunities for export growth for 14 countries from the Asia and the Pacific region within the Chinese market.

## T4SD FORUM

In October, T4SD Forum brought together representatives of the private and public sector, research institutions and international standards organizations to discuss major trends in sustainable value chains. This year's addition, the focus was on SDG 12 "Responsible Consumption and Production" and its relationship with sustainable trade in global value chains.

## HS CODE CORRESPONDANCES

The identification of your product code is the starting point of the trade flows analysis in Trade Map. A major improvement has been done this year on the "[advanced search](#)" feature in Trade Map to easily identify the Harmonized System product code corresponding to your keywords. Based on a large thesaurus, the products search is now more powerful and faster than ever.

## PUSHING THE FRONTIERS OF EXPORT POTENTIAL

During 2018, the Studies team worked on methodological extensions in three directions: the identification of diversification opportunities that add value to domestic inputs to create more transformed products (VCI), the assessment of export potential in services for 194 countries, and the estimation of direct, indirect and induced jobs associated with a full use of export potential across sectors.

## PROCUREMENT MAP CONTRACT AWARDS

Procurement Map database has been enhanced with contracts awards: in addition to active public tenders in more than 180 countries, Procurement Map now provides you with 700,000 historical contracts awards.

## CAPACITY BUILDING

In 2018, ITC's Capacity Building team conducted over 70 workshop training sessions and webinars that were attended by nearly 3,000 beneficiaries from over 50 countries. In-person workshops were held in 24 different nations, and over 60% of attendees were women. Trainings were well-attended by students and professionals from a multitude of disciplines, including policymakers, business owners and workers from the private sector, and representatives from numerous trade support institutions and sectoral associations.

In February 2018, ITC, the UNDP, and the Islamic Trade Finance Corporation kicked off the second workshop of the trade intelligence training programme for Central Asia in Istanbul, Turkey, bringing together participants from Trade Support Institutions (TSIs) of eight nations; Afghanistan, Azerbaijan, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan. 12 new trainers were certified, and can now organize training events in their country to enable local businesses to even better understand current trade trends and market requirements.

In May, 23 Kenyan professionals (including 18 women) came together in [Nairobi, Kenya](#), to sharpen their analytical skills through the Export and Investment Potential Assessment Training. These professionals from KenInvest, the Kenyan Export Promotion Council and business professionals from the National Chamber of Commerce worked diligently to conduct market research on promising products using Trade Map, Market Access Map, and Export Potential Map.

In [Buirut, Lebanon](#), this past July, ITC worked with the Lebanese Ministry of Economy and Trade to conduct a training on market profiles organized by the Aid for Trade Initiative for the Arab States (AfTIAS) programme. This training was attended by representatives of the Ministry of Economy and Trade, the Ministry of Foreign Affairs, and the Ministry of Industry, as well as members of other agencies.

## WOMEN, TRADE AND NTMS

ITC's NTM and SheTrades Program have started a collaboration to start filling the data gap in gender-specific issues regarding NTMs. They aim to offer a better understanding of women's participation in trade and shed more light on women entrepreneurship, female employment in exporting firms and uncover women's barriers to trade.

## EXPORT POTENTIAL MAP UPGRADES

Export Potential Map is now also available in French and Spanish, responding to the needs of our beneficiaries in Latin America and Africa. We also updated the tool with revised product groups to include the HS 2017 revision and a new weighting scheme that puts greater emphasis on exports for recent years. Navigational videos for the tool are forthcoming by the end of 2018.

Overall, 2018 was an excellent year for ITC's Capacity Building program. Through Training-of-Trainers workshops, webinars, and in-person trainings combined with online preparatory courses, ITC greatly expanded the use of its market analysis tools and gave students and professionals throughout the world additional capabilities to gain access to global markets.



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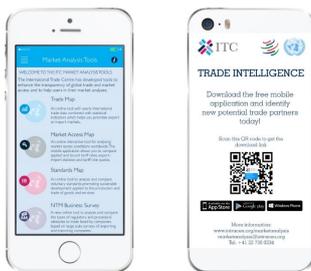
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